

SVQ 4 in Customer Service at SCQF Level 8

Scottish Vocational Qualifications

Specification

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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 strategy as published by the relevant Sector Skills Council/Standards Setting Body
- the Technical Apprenticeship Framework in which the qualification is included, where appropriate.

1 Introducing Scottish Vocational Qualifications

What are Scottish Vocational Qualifications?

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

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

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

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

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

Most candidates will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment 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 4 in Customer Service at SCQF Level 8
Operational start date	01/09/2015
Minimum age	18+ 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 strategy.
Number of required units	8
Credit points	64
Assessment	Portfolio of Evidence (internal assessment).
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification. However, it is likely that candidates will be seeking work in the customer service sector, or they may already be employed in a cross-sector role or function that involves responsibility for defined service-related activities with an area of responsibility, and/or carrying out defined customer service management activities within an operational area of responsibility. Centres must also follow the Pearson <i>Access and Recruitment</i> policy (see <i>Section 7, Access and Recruitment</i>).
Funding	Details of funding approval are available from Skills Development Scotland at: www.skillsdevelopmentscotland.co.uk and the Scottish Funding Council at: www.sfc.ac.uk Information is also available on the Scottish Qualifications Authority (SQA) website: www.sqa.org.uk

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

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4 Qualification rationale

Qualification objectives

The SVQ 4 in Customer Service at SCQF Level 8 is for candidates who work in or who want to work in customer service management roles such as:

Client Services Manager

Communications Manager

Customer Operations Manager

Service Delivery Manager

The qualification gives candidates the opportunity to:

- develop and demonstrate a range of technical skills and behaviours that supports competence in the job roles stated above. This includes managing and preparing staff and resources for customer service delivery, developing customer service strategy and reviewing and improving the quality of customer service
- develop their knowledge and understanding related to the job roles specified above, including, techniques and practices for monitoring and improving the quality of customer service, understanding how to build effective relationships with customers and how resources are developed to support customer service delivery
- have existing skills and knowledge recognised
- achieve a nationally-recognised SCQF Level 8 qualification
- develop personal growth and engagement in learning.

Relationship with previous qualifications

This qualification does not replace any other qualification.

Progression opportunities

Candidates who achieve the SVQ 4 in Customer Service at SCQF Level 8 can progress to the Modern Apprenticeship in Management at Level 4, which includes the SVQ 4 in Management at SCQF Level 9, or the Modern Apprenticeship in Management at Level 5, which includes the SVQ 5 in Management at SCQF Level 11.

Industry support and recognition

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

Relationship with National Occupational Standards

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

5 Qualification structure

SVQ 4 in Customer Service at SCQF Level 8

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

Minimum number of credits that must be achieved	64
Minimum number of credits that must be achieved at Level 8 or above	48
Number of mandatory units that must be achieved	2
Number of optional units that must be achieved The candidate must complete both mandatory units plus a minimum of one unit from Optional Groups B, C, D and E. In addition, the candidate must complete a further two units from any of Groups B, C and E	6

Unit	SQA unit code	Mandatory units – Group A Customer Service Foundations	Credit points	SCQF Level
1	CFACSF5	Show Understanding of Customer Service Management	10	8
2	CFACSF6	Follow Organisational Rules, External Regulations and Legislation when Managing Customer Service	10	8
Unit	SQA unit code	Optional units – Group B Impression and Image	Credit points	SCQF Level
3	CFACSA17	Champion Customer Service	10	8
4	CFACSA18	Make Customer Service Environmentally Friendly and Sustainable	11	8
Unit	SQA unit code	Optional units – Group C Delivery	Credit points	SCQF Level
5	CFACSB12	Maintain and Develop a Healthy and Safe Customer Service Environment	8	8
6	CFACSB13	Plan, Organise and Control Customer Service Operations	10	8
7	CFACSB14	Review the Quality of Customer Service	8	8
8	CFACSB15	Build and Maintain Effective Customer Relations	8	8

Unit	SQA unit code	Optional units – Group C Delivery (continued)	Credit points	SCQF Level
9	CFACSB16	Deliver Seamless Customer Service with a Team	8	8
Unit	SQA unit code	Optional unit – Group D Handling Problems	Credit points	SCQF Level
10	CFACSC8	Handle Referred Customer Complaints	10	8
Unit	SQA unit code	Optional units – Group E Development and Improvement	Credit points	SCQF Level
11	CFACSD14	Implement Quality Improvements to Customer Service	10	8
12	CFACSD15	Plan and Organise the Development of Customer Service Staff	9	8
13	CFACSD16	Develop a Customer Service Strategy for a Part of an Organisation	11	8
14	CFACSD17	Manage a Customer Service Award Programme	7	8
15	CFACSD18	Apply Technology or Other Resources to Improve Customer Service	11	8
16	CFACSD19	Review and Re-engineer Customer Service Processes	11	8
17	CFACSD20	Manage Customer Service Performance	7	7
18	CFACSD21	Analyse and Report on the Content of Customer Service Feedback Posted on Social Media	4	6
19	CFACSD22	Develop a Customer Service Network through Social Media Platforms	5	7

6 Programme delivery

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

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

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

Elements of good practice

Candidate recruitment, preparation and support

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

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

Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

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

Employer engagement

Good practice in relation to employer engagement includes:

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

7 Centre resource requirements

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

- Centres must have the appropriate physical resources to support delivery and assessment of the qualification, for example a workplace in line with industry standards, or a Realistic Working Environment (RWE), where permitted, as specified in the Assessment Strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where RWE is permitted, it must offer the same conditions as the normal, day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment strategy in *Annexe A*. Staff assessing candidates must meet the occupational competence requirements within the overarching assessment strategy for the sector.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.
- Centres must deliver the qualification in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, see *Section 7, Access and recruitment*. For full details on the Equality Act 2010 go to www.legislation.gov.uk or www.scotland.gov.uk

8 Access and recruitment

Our policy on access to our qualifications is that:

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

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

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

Prior knowledge, skills and understanding

No prior knowledge, understanding, skills or qualifications are required before candidates register for this qualification. However it is likely that candidates will be seeking work in the customer service sector, or they may already be employed in a cross-sector role or function that involves responsibility for defined service-related activities with an area of responsibility, and/or carrying out defined customer-service management activities in an operational area of responsibility.

Access to qualifications for candidates with disabilities or specific needs

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 8, Assessment*.

9 Assessment

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

Language of assessment

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

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

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

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

Internal assessment

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

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

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

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

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

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the candidate
Consistent	achieved on more than one occasion
Current	usually not more than two years old
Sufficient	fully meets the requirements of the performance, behaviour and knowledge outcomes and standards.

Candidates can provide evidence of occupational competence from:

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

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

- a combination of these.

Assessment strategy

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

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 10, Quality assurance of centres*) and the requirements of the assessment strategy given in *Annexe A*.

In line with the assessment 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 one piece 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 be clearly reference the unit being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

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

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

Appeals

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

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

Dealing with malpractice

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

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

Reasonable adjustments to assessment

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

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

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

Special consideration

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

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

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

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

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

Credit transfer

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

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

10 Centre recognition and approval

Centre recognition

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

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

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

Approvals agreement

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

11 Quality assurance of centres

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

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

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

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

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

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

12 Unit format

Each unit has the following sections.

Unit title

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

Unit code

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

SCQF level

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

Credit points

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

Unit summary

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

Unit assessment requirements

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

Terminology

Key terms and concepts that feature in the unit.

Assessment outcomes and standards

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

Knowledge and understanding

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

Performance criteria

The level of competence the candidate has to achieve.

Unit 1: Show Understanding of Customer Service Management

Unit code:	CFACSF5
SCQF level:	8
Credit points:	10

Unit summary

Management responsibilities in a role that is directly related to customer service generally involve a set of skills, knowledge and understanding that might be expected of any manager. However, the nature of customer service means that, if you have specific customer service responsibilities, there is a further skills and knowledge set that you need.

This unit covers the key principles of customer service that influence how it is managed and the links between your management responsibilities and those key principles. The unit recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This unit gives you the opportunity to demonstrate the knowledge and understanding needed to be effective in customer service management.

Unit assessment requirements

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

Terminology

Customer service management; key principles; knowledge; understanding; strategic principles

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	
1	the customer service management role and responsibilities in relation to your organisation's service offer, customer expectations and customer satisfaction
2	how effective customer service depends on a combination of organisational systems and the individual skills of those responsible for customer service delivery
3	how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation
4	how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality
5	the options for monitoring customer service performance and the benefits and drawbacks of each option
6	the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors
7	the key features of a customer service culture in an organisation
8	how risk assessment can be applied to customer service situations when dealing with customer service problems
9	options for making use of technology to improve customer service delivery
10	ways in which an organisation can seek continuous improvement in its customer service
11	ways in which the ethical and values base of an organisation's approach to customer service are demonstrated and maintained
12	the nature of your responsibilities for customer service resources and systems in your organisation

Knowledge and understanding

13	your leadership role in customer service delivery
14	the key skills and attributes to be sought when recruiting for a person to deliver customer service in your organisation
15	options for training, development and/or achievement of qualifications by your organisation's staff in customer service and the benefits and drawbacks of each option
16	the importance of the steps you take to monitor and maintain effective delivery of customer service in your organisation
17	ways in which you promote continuous improvement within your organisation
18	the importance of establishing a strong network of contacts with similar interests in customer service

Performance criteria

Demonstrate understanding of the principles of customer service that influence the way it is managed

1	exercise customer service management responsibility with consideration for your organisation's service offer, customer expectations and resources
2	supervise and develop staff skills in the delivery of customer service
3	contribute to the development of customer service policies, culture and ethics in your organisation
4	evaluate options for technology that will improve customer service delivery
5	carry out risk assessment when dealing with customer service problems

Demonstrate how your management responsibilities link with customer service principles

6	display leadership in a customer service role
7	contribute to recruitment and development of staff with appropriate customer service skills
8	monitor and maintain effective customer service in your organisation
9	promote improvement of customer service in your organisation

Unit 2: Follow Organisational Rules, External Regulations and Legislation when Managing Customer Service

Unit code:	CFACSF6
SCQF level:	8
Credit points:	10

Unit summary

Management responsibilities in a role that is directly related to customer service generally involve actions and a set of knowledge and understanding of legislation and regulation that impact on the management function and the way you fulfil it.

Regulation of customer service may originate from within an organisation through policies and procedures or from external regulators. Some legislation applies directly to the relationship between service providers and customers. This unit is about observing the law and rules, and what you must know and understand in order to manage customer service processes effectively.

Unit assessment requirements

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

Terminology

Management; legislation; regulations; laws; rules; knowledge; understand; managing processes; influencing skills; 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	
1	the steps that managers can take to encourage development of a customer service culture in your organisation
2	the importance of influencing skills for the development of customer service in your organisation
3	the opportunities provided and constraints placed on customer service delivery by the policies and procedures of your organisation
4	the structure of authority in your organisation relating to customer service management
5	the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise customer service management actions alone
6	how you should involve service partners in customer service management actions
7	the sources of information about organisational rules, policies and procedures that relate to customer service
8	your organisation's definition of a complaint and your responsibility in connection with complaints
9	the structure of legislation and external regulation that impacts on the customer service of your organisation
10	the importance of the regulatory authority of different legal and regulatory bodies for your organisation
11	the risks for your organisation presented by non-compliance with different legal and regulatory bodies
12	the level of knowledge and understanding needed by people in your organisation involved in customer service delivery regarding relevant legislation and external regulation
13	the importance of taking full account of legal and regulatory requirements when planning customer service developments
14	the relationship between customer service policy and compliance

Performance criteria

Follow your organisation's rules and culture related to customer service

- | | |
|---|--|
| 1 | contribute to the development of customer service in your organisation within the organisation's rules and culture |
| 2 | act within your own authority to promote customer service in your organisation |
| 3 | use appropriate sources of information about organisational rules, policies and procedures that relate to customer service |
| 4 | deal with customer service problems and complaints within organisational rules |

Follow external regulations and legislation when managing customer service

- | | |
|---|--|
| 5 | manage customer service activities following external regulations and legislation |
| 6 | assess the risks resulting from non-compliance with external regulations and legislation when supervising the delivery of customer service |
| 7 | contribute to development of customer service policies and procedures that comply with external regulations and legislation |

Unit 3:

Champion Customer Service

Unit code: CFACSA17

SCQF level: 8

Credit points: 10

Unit summary

Staff with high levels of responsibility for customer service have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit.

This unit is about acting as a champion – being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your knowledge and expertise to others.

Unit assessment requirements

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

Terminology

Responsibility; excellent service; service partners; knowledge; champion; analyse; expertise; 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	
1	the processes for decision making within your organisation and who is involved
2	how to monitor developments within your organisation
3	how to use your influence and authority to affect decision making
4	the types of developments that are likely to affect customer service and how to analyse the implications for customer service
5	the importance of empathising with customers and how to represent their viewpoint in a constructive way
6	how to identify when others need advice and information on customer service issues
7	how to use different types of research to support your advice and information on customer service
8	how to apply your advice and information in practice
9	how to monitor the effect of your advice and information

Performance criteria

Promote the importance and benefits of customer service

- | | |
|---|---|
| 1 | explain the role of customer service within your organisation's strategic and business plans |
| 2 | continuously monitor developments in your organisation in order to identify those important to customer service |
| 3 | analyse the implications of customer service developments in your organisation |
| 4 | question and challenge developments from the customer's standpoint |
| 5 | use your influence to ensure that developments improve customer service |

Provide advice and information on customer service issues

- | | |
|----|---|
| 6 | make it known that you can provide customer service advice and information |
| 7 | respond to requests for customer service advice and information |
| 8 | carry out any necessary research to enhance or verify the advice and information you are giving |
| 9 | communicate customer service advice and information effectively |
| 10 | help others to explore the implications of your advice and information for their own work and identify actions that the advice and information might prompt |
| 11 | monitor how effective your advice and information has been |
| 12 | review the way you collect information, formulate advice and communicate it to others |

Unit 4: Make Customer Service Environmentally Friendly and Sustainable

Unit code: CFACSA18

SCQF level: 8

Credit points: 11

Unit summary

Environmental awareness, and acting positively in relation to current environmental issues, form an important aspect of strategy for many organisations. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. Periodically, the link between customer service and environmentalism needs to be reviewed so that appropriate changes may be made. Environmental and sustainability awareness must be encouraged constantly so that staff, suppliers, customers and other stakeholders are reminded of their contributions and responsibilities.

This unit is appropriate for you if your job involves responsibility for customer service and sufficient authority to review and promote environmental matters in your organisation or in some part of it.

Unit assessment requirements

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

Terminology

Environmental; policies; sustainability; awareness; responsibilities; customer service; authority

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	
1	principles of environmentalism and sustainability that are relevant to customer service operations
2	ways to express environmental policies and link them with customer service
3	principles of energy management and reduction of carbon emissions
4	principles of waste management relevant to your organisation
5	techniques for reviewing environmental aspects of customer service systems
6	different actions that may be taken to improve environmental aspects of customer service delivery
7	ways to minimise resource use in customer service delivery
8	techniques for communicating and developing awareness of environmental matters among stakeholders
9	ways to encourage customers to act more environmentally friendly

Performance criteria

Review and monitor environmental and sustainability aspects of customer service

1	identify your organisation's policies on customer service and on the environment and trace links between the two
2	identify your organisation's policy on energy management and carbon emissions and their key links with customer service systems
3	identify your organisation's policy on waste management and its key links with customer service systems
4	carry out a systematic review of your organisation's customer service systems to identify opportunities for environmental improvements
5	identify service partnerships that affect your organisation's environmental profile and what they might do to improve it
6	develop an action plan to promote environmental actions and improvements in your organisation's customer service delivery

Promote environmental and sustainable aspects of customer service in your organisation

7	make links between your organisation's environmental policies and customer service delivery routines
8	encourage those involved in customer service delivery to promote an environmental approach by customers
9	identify and promote ways to minimise resource use in customer service delivery
10	communicate your organisation's environmental policies to service partners, including suppliers, and encourage their participation in environmental improvements
11	communicate your organisation's environmental policies to customers and encourage their participation in environmental improvements
12	develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability
13	develop community stakeholder's awareness of your organisation's environmental policies and approaches

Unit 5: Maintain and Develop a Healthy and Safe Customer Service Environment

Unit code:	CFACSB12
SCQF level:	8
Credit points:	8

Unit summary

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers.

This unit is about managing the delivery of services or products in a way that is safe for customers and colleagues.

Unit assessment requirements

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

Terminology

Health; safety; environment; delivery; customer service; risks; hazards; emergency; drills; codes of practice; customer service; communication; problem solving; behaviours; work with others; team work; 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	
1	the importance of maintaining a healthy, safe and effective working environment for customers and staff
2	your responsibilities for health and safety in the workplace
3	your responsibilities for maintaining an effective working environment
4	how to access information on legal and regulatory requirements for health and safety and relevant codes of practice
5	the types of health and safety hazards that are likely to occur in your area of responsibility
6	how to assess the risks associated with these health and safety hazards
7	how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice
8	your organisation's policies and procedures for health and safety
9	the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment

Performance criteria

Assess the customer service environment for factors that affect health and safety

1	identify health and safety hazards in your customer service environment
2	assess the risks associated with these hazards
3	identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers
4	evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against your organisation's policies and procedures and customer expectations
5	provide information about risks and hazards to those responsible for health and safety

Minimise risks to health and safety in the customer service environment

6	ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety
7	ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures
8	ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them
9	enable staff to identify and report health and safety hazards
10	use agreed organisational procedures to deal with hazards when they occur
11	review the health and safety aspects of the customer service environment as required by law and your organisation
12	carry out emergency drills within your area of responsibility
13	follow organisational procedures for keeping health and safety records up to date and for reporting health and safety incidents

Unit 6: Plan, Organise and Control Customer Service Operations

Unit code:	CFACSB13
SCQF level:	8
Credit points:	10

Unit summary

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, you must be able to deal with these problems in a way that leaves your customer with a positive impression of your organisation.

This unit is about managing the delivery of services to the customer.

Unit assessment requirements

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

Terminology

Delivery; customer loyalty; monitoring; solving problems; positive impression; 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	
1	how to develop plans for customer service operations and what these plans should contain
2	how to identify and work within allocated budgets and time targets for customer service operations
3	the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
4	the types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
5	how to develop objectives and targets for staff
6	the importance of briefing staff and how to do so effectively
7	the importance of monitoring the quality of your customer service operations
8	the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
9	the importance of liaising with customers and colleagues about problems and possible solutions
10	how to identify and evaluate possible solutions
11	the different sources of information available, including the internet and social media, and the opportunities they present for monitoring information about customers

Performance criteria

Plan customer service operations

- | | |
|---|---|
| 1 | analyse customer expectations and define the service offer designed to meet those expectations |
| 2 | develop specific plans that will ensure sustainable and consistent delivery of customer service |
| 3 | identify any contingencies that may occur, assess their risks and develop effective plans to deal with them |
| 4 | plan how you will monitor and evaluate customer service operations |

Supervise customer service operations

- | | |
|----|--|
| 5 | negotiate the availability of people and other resources that you need to implement your customer service delivery plans |
| 6 | develop specific, measurable and realistic targets for the staff who deliver customer service |
| 7 | ensure that planned resources are available when required |
| 8 | brief staff on their objectives and targets |
| 9 | encourage feedback from staff and customers and use their feedback to modify objectives and targets |
| 10 | collect and analyse feedback from customers and staff on customer service operations |
| 11 | evaluate how effectively agreed outcomes and processes are being achieved |
| 12 | modify your plans for customer service operations in the light of your evaluation |

Performance criteria

Deal with problems relating to customer service operations

13	collect information on the nature of the problem and assess the likely impact on the customer
14	identify the causes of the problem and possible solutions
15	evaluate possible solutions against customer expectations and organisational needs
16	select and implement an acceptable solution with the minimum possible disruption to customers
17	monitor the implementation of the solution and, where necessary, make adjustments

Unit 7:

Review the Quality of Customer Service

Unit code: CFACSB14

SCQF level: 8

Credit points: 8

Unit summary

Members of staff managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal, or how to improve customer service to meet and exceed customer expectations.

This unit is about collecting and analysing information so that you can measure standards of customer service. You will develop conclusions and recommendations and then report your findings to the relevant people. Most importantly, this unit is about reviewing customer service quality systematically and making full use of your findings.

Unit assessment requirements

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

Terminology

Delivery; quality; expectations; planning; collecting; analysing; measuring; 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	
1	the importance of measuring the quality of customer service
2	how to identify which aspects of the customer service process affect customer satisfaction
3	how to select the criteria you will use for measurement of customer service
4	how to construct representative samples
5	the types of information collection methods you could use
6	how to make use of all available sources of information and feedback about service quality including what is available through social media
7	methods of analysing information on the quality of customer service
8	how to identify recommendations that flow from your measurement of customer service
9	the procedures for making recommendations on customer service improvements within your organisation

Performance criteria

Plan how to measure customer service

- | | |
|---|---|
| 1 | identify the features of customer service delivery that affect customer satisfaction |
| 2 | plan how you will monitor the features of customer service delivery that affect customer satisfaction |
| 3 | plan how you will analyse the information you have collected |

Collect and analyse information on customer service

- | | |
|---|--|
| 4 | implement your plans for monitoring customer service processes and outcomes |
| 5 | analyse the monitoring information you have collected |
| 6 | compare the conclusions of your analysis with the criteria you identified |
| 7 | adapt your plans if the agreed methods of collecting and analysing information are not proving effective |
| 8 | communicate the results of your measurement of customer service to colleagues |
| 9 | agree actions to improve customer service that result from your measurements and analysis |

Unit 8: Build and Maintain Effective Customer Relations

Unit code:	CFACSB15
SCQF level:	8
Credit points:	8

Unit summary

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty.

This unit is about establishing and maintaining effective customer relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success.

This unit is for you only if you are in a position to influence the way your organisation determines the level of service offered to different customers.

Unit assessment requirements

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

Terminology

Customer relationships; building relationships; loyalty; influence; 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	
1	how to identify and prioritise types of customers with whom you should be building a longer term relationship
2	the most appropriate method of establishing relationships with customers targeted for longer term relationships
3	the importance of effective communication skills when dealing with customers
4	how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship
5	how to communicate with customers, especially when they are dissatisfied with services or products
6	how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
7	the types of compromises that would be acceptable to your organisation when meeting customer expectations
8	how to use your influence and authority in your organisation to meet or exceed customer expectations
9	methods of monitoring customer satisfaction appropriate to your level of authority in the organisation
10	the part played by internet contact and social media and the potential this offers for building and maintaining effective customer relations

Performance criteria

Establish effective customer relations

- | | |
|---|--|
| 1 | identify the types of customers with whom you should build longer term customer relations and promote loyalty |
| 2 | communicate with these customers so that they know they are important to your organisation |
| 3 | explain your role, the purpose of making contact and the mutual benefits of building a longer term relationship with customers |
| 4 | make it clear that you welcome two-way communication about customer expectations |

Maintain and develop effective customer relations

- | | |
|---|--|
| 5 | keep customers informed and accept criticism from customers openly and constructively |
| 6 | regularly assess whether customer expectations are being consistently met |
| 7 | use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded |
| 8 | collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction |
| 9 | analyse customer relations and propose changes that will develop longer term loyalty to people with authority in your organisation |

Unit 9: Deliver Seamless Customer Service with a Team

Unit code:	CFACSB16
SCQF level:	8
Credit points:	8

Unit summary

Excellent customer service is a team effort. You cannot win and maintain the loyalty of customers without pulling together with all the other staff that help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities.

The team probably includes colleagues, senior managers and service partners who are working in other departments or outside your organisation but still contribute to customer service delivery. To achieve your organisation's aims and objectives for customer service you will need to have effective working relationships with all of these – especially when you urgently need their cooperation and support.

Unit assessment requirements

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

Terminology

Teamwork; delivery; maintain loyalty; work with others; team; working relationships; cooperation; support; gambling

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	
1	how to analyse the contribution and roles of colleagues and service partners when delivering customer service
2	the types of support you could provide to colleagues and service partners and they could provide to you to deliver seamless customer service
3	the benefits and challenges of collaborative working, what may go wrong and how to prepare for this
4	the value and importance of effective communication with colleagues and service partners
5	the types of behaviours that show you have a relationship of respect and honesty with colleagues and service partners
6	how to deal with conflict constructively

Performance criteria

Build effective working relationships with colleagues

- | | |
|---|--|
| 1 | identify and agree with colleagues team strategies for delivering seamless customer service |
| 2 | share information and knowledge to improve customer service |
| 3 | encourage, accept and respond positively to feedback from colleagues on customer service performance |
| 4 | work with colleagues to deal with conflict constructively |
| 5 | review teamwork strategies for delivering seamless customer service with colleagues |

Build effective relationships with service partners

- | | |
|----|---|
| 6 | identify the service partners who are most significant to delivery of seamless customer service |
| 7 | take opportunities to establish and develop effective working relationships with service partners |
| 8 | ensure that your commitments to service partners and their commitments to you are being fulfilled as agreed |
| 9 | communicate clearly and in good time with service partners on issues that affect them and your customers |
| 10 | work together with service partners to resolve customer service problems |
| 11 | work together with service partners to deal with conflict constructively |

Unit 10:

Handle Referred Customer Complaints

Unit code: CFACSC8

SCQF level: 8

Credit points: 10

Unit summary

However effectively customer service is organised, customers make complaints from time to time. In some organisations, it is simply a matter of procedure for all complaints to be handled by particular people. Sometimes, front-line staff or supervisors can deal with these complaints, however often more senior staff must deal with the complaint. This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level. This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

Unit assessment requirements

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

Terminology

Complaints; solutions; patterns; trends; referrals; repetition; customer service; communication; problem solving; behaviours; work with others; giving information; team working; 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	
1	the importance of minimising customer complaints and dealing with them effectively and promptly when they occur
2	your organisation's complaints procedures and the limits of your authority
3	the procedures you must follow if a complaint is likely to be escalated or have wider implications
4	the types of complaints that could have wider implications for your organisation
5	why it is important to communicate with your customer at all stages of a complaints procedure
6	how to devise solutions that balance customer expectations and organisational aims
7	why it is important to identify and present to the customer a range of possible options
8	why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
9	how to identify trends and patterns in customer complaints and solutions
10	how to explore the implications of these patterns and trends for your organisation's policies and procedures
11	how to recommend changes to organisational policies and procedures
12	the benefits and drawbacks of using different forms of response when complaints have originated through different channels such as social media

Performance criteria

Investigate referred customer complaints

1	collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint
2	take personal responsibility for dealing with the complaint subject to the limits of your authority
3	keep your customer informed about what steps are being taken to deal with their complaint
4	follow the correct procedures if your customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation

Take action to deal with referred customer complaints

5	identify a range of possible solutions that balance customer expectations and your organisation's service offer
6	liaise with your customer and colleagues to negotiate an acceptable solution
7	agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
8	implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken

Identify repeated customer complaints and recommend changes to policies and procedures

9	identify patterns and trends in customer complaints
10	analyse trends in customer complaints
11	identify solutions acceptable to your customers that fit your organisation's service offer
12	identify possible changes to customer service policies and procedures
13	consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
14	select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers

Unit 11: Implement Quality Improvements to Customer Service

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

Unit summary

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results.

The unit covers the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular, it is vital to involve customers at all stages of the quality improvement process.

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Plan the introduction of customer service improvements

- | | |
|---|---|
| 1 | identify possible customer service improvements and the resources available to implement them |
| 2 | evaluate factors that may help or hinder the introduction of change |
| 3 | develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues |
| 4 | assess the risks associated with each action to effect change |
| 5 | plan how you will evaluate the proposed improvements |

Manage the implementation of customer service improvements

- | | |
|---|--|
| 6 | inform the people who will be affected by change, win their support and keep them informed of progress |
| 7 | implement your plans for improvements dealing effectively with any difficulties |
| 8 | provide the necessary support to all your colleagues who are involved with changes and improvements |
| 9 | ensure that planned improvements are implemented on time and within budget |

Monitor and evaluate customer service improvements

- | | |
|----|---|
| 10 | monitor and evaluate the impact that changes are having on the quality of customer service |
| 11 | identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of improvements |
| 12 | identify any lessons from the change process and note these for future activities |

Unit 12:

Plan and Organise the Development of Customer Service Staff

Unit code: CFACSD15

SCQF level: 8

Credit points: 9

Unit summary

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

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

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Identify customer service staff development and training needs

- | | |
|---|--|
| 1 | identify where customer service could be improved through staff training and development |
| 2 | help staff providing customer service to identify their own development and training needs |
| 3 | help staff to identify how they learn best |
| 4 | agree the types of staff development and training activities that are needed |
| 5 | report staff development needs to relevant people in your organisation |

Organise customer service development and training

- | | |
|----|--|
| 6 | agree the aims and objectives of the customer service development and training activities |
| 7 | agree the type and style of customer service development and training that are appropriate |
| 8 | agree the detailed design of customer service development and training activities |
| 9 | organise customer service development and training activities |
| 10 | monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice |
| 11 | organise additional help and training for staff where this is needed |

Unit 13:

Develop a Customer Service Strategy for a Part of an Organisation

Unit code: CFACSD16

SCQF level: 8

Credit points: 11

Unit summary

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's own customers as well as their general expertise in customer service, such as their knowledge of other organisations and the published research into trends in customer service.

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

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Research and evaluate your organisation's business and customer service strategy

1	identify your organisation's values, aims and objectives
2	identify the role of a given part of the organisation in achieving the strategy
3	evaluate the implications of the strategy for customer service in this part of the organisation
4	confirm the implications of the strategy for customer service with colleagues
5	collect information on and analyse customer expectations
6	match customer expectations with the customer service implications of the business strategy for a given part of your organisation

Help to identify current and future best practice in customer service

7	identify other organisations which represent models of good practice in customer service
8	evaluate the key features of customer service in these organisations and the principles that underpin their approaches
9	identify and analyse current research on trends and developments in customer service
10	identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
11	explore the implications of your research for the part of the organisation you are working in
12	discuss the outcomes of your research with colleagues

Performance criteria

Identify and recommend the key features of a customer service strategy

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

Unit 14: Manage a Customer Service Award Programme

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

Unit summary

This unit is about the competences involved in managing a customer service award programme for individuals or teams in an organisation. A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers your commitment to customer service.

While such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take full account of the strategic customer service implications.

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Plan a customer service award programme

1	identify all the possible options for a customer service award scheme drawing on examples inside and outside of your own organisation
2	identify the benefits and drawbacks of each option for a customer service award programme
3	choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
4	plan the details of your chosen customer service award programme
5	identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
6	make a business case for the introduction of a customer service awards programme or for the development of an existing programme

Implement and manage a customer service award programme

7	launch developments in the customer service award programme in a way that informs and motivates customers and team members
8	ensure that the criteria for the customer service awards are transparent and are considered fair by team members
9	publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
10	organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
11	announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
12	review and evaluate the effects of the customer service awards programme on customers and team members

Unit 15:

Apply Technology or Other Resources to Improve Customer Service

Unit code: CFACSD18

SCQF level: 8

Credit points: 11

Unit summary

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

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

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Identify and specify opportunities for customer service improvement

- | | |
|---|---|
| 1 | monitor developments in technology and the use of other resources to improve customer service |
| 2 | review customer service delivery systems with specific reference to use of resources and technology |
| 3 | identify opportunities and options for improving customer service by applying technology or other resources |
| 4 | analyse the customer service benefits that could result from options for improvement |
| 5 | specify the changes in technology or other resources needed to deliver the options |

Evaluate options for applying technology or other resources to improve customer service

- | | |
|----|--|
| 6 | identify the options for improving customer service with the application of technology or other resources |
| 7 | establish the costs associated with each option for improving customer service |
| 8 | list and, where possible, quantify the benefits from each option for improving customer service |
| 9 | estimate the affordability of each option to improve customer service |
| 10 | recommend the most appropriate options for implementation |
| 11 | identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions |
| 12 | plan a business case to support your recommendations for improvements through application of technology or other resources |

Performance criteria

Oversee the implementation of resource changes to improve customer service

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

Unit 16:

Review and Re-engineer Customer Service Processes

Unit code: CFACSD19

SCQF level: 8

Credit points: 11

Unit summary

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

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

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

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Scope the customer service processes to be reviewed

- | | |
|---|---|
| 1 | define the boundaries of a customer service process |
| 2 | agree with the appropriate people the boundaries of the customer service process to be reviewed |
| 3 | set parameters for the types of change that might be made during the re-engineering |
| 4 | communicate with everybody involved regarding the aims of the review |

Analyse the customer service process and identify improvement opportunities

- | | |
|----|---|
| 5 | identify all the key steps in the customer service process |
| 6 | analyse each step in the customer service process in fine detail |
| 7 | assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation |
| 8 | raise questions about each step in the current process to establish where there is scope for development and improvement |
| 9 | explore all the questions raised with those involved in the process and their managers |
| 10 | identify options for re-engineering improvements that deserve further investigation |

Evaluate improvement options and re-engineer service processes

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

Unit 17:

Manage Customer Service Performance

Unit code: CFACSD20

SCQF level: 7

Credit points: 7

Unit summary

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

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

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

Monitor performance in customer service operations

1	collect regular statistics on customer service operations performance
2	interpret broad patterns of customer service operations statistics
3	investigate questions raised by interpretation and analysis of performance
4	interpret statistics regarding customer service performance in specific product and service areas
5	match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
6	use customer service performance statistics to identify trends
7	compare customer service performance statistics with broader quality monitoring results
8	review resource provision to identify any resource changes needed to improve customer service performance management

Take management actions to improve performance in customer service operations

9	identify management actions to maintain and improve on customer service performance
10	summarise monitoring evidence to support the case for management actions to improve performance
11	brief team members on changes they must make to improve customer service performance
12	organise resource changes needed to improve customer service performance
13	organise suitable coaching or training to improve customer service performance where development needs have been identified
14	adjust customer service performance targets which have ceased to be both challenging and achievable

Unit 18:

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

Unit code: CFACSD21

SCQF level: 6

Credit points: 4

Unit summary

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

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

Unit assessment requirements

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

Terminology

Development and improvement; social media platforms; customer feedback

Assessment outcomes and standards

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

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

Performance criteria

Collect and collate customer service feedback on social media platforms

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

Analyse customer service feedback gathered from social media platforms

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

Unit 19:

Develop a Customer Service Network through Social Media Platforms

Unit code: CFACSD22

SCQF level: 7

Credit points: 5

Unit summary

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

This unit is all about the customer service actions needed to maintain and develop a customer network using social media platforms as important channels of communication. You should choose this unit if your customer service role includes a full and active involvement with social media platform uses for customer service.

Unit assessment requirements

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

Terminology

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

Assessment outcomes and standards

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

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

Performance criteria

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

1	analyse customer service processes that are essential to your organisation's service offer, services or products
2	identify social media platforms which are most likely to be used by your organisation's customers
3	research the ways in which your organisation and others currently use social media platforms for customer service
4	draw up a profile of how your customers and potential customers use social media platforms
5	identify social media communities that are relevant to your organisation's customer service processes
6	draw up profiles of the social media communities that are relevant to your organisation's customer service processes
7	identify and define improvements that could be made to your organisation's use of social media for customer service
8	check your proposed improvements comply with regulation relating to the use of social media

Manage on-going delivery of customer service using social media

9	plan enhanced use of social media to deliver customer service using data gathered when reviewing existing social media uses
10	work with colleagues to allocate responsibilities for making improvements to social media use for customer service
11	contribute to the development of procedures for providing customer service to customers and social media communities
12	contribute to the implementation of improvements in customer service using social media
13	monitor the effects of improvements to customer service using social media
14	review use of social media for delivery of customer service using data collected through monitoring to identify further improvements

13 Further information and useful publications

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

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

Key publications:

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

All of these publications are available on our website.

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

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

14 Professional development and training

Professional development and training

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

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

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

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

Training and support for the lifetime of the qualifications

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

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

Online forum

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

15 Contact us

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

Email: wblcustomerservices@pearson.com

Telephone: 0844 576 0045

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

Email: wbl@pearson.com

Telephone: 0844 576 0045

Complaints and feedback

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

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

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

Annexe A: Assessment strategy



Skills CFA

Assessment Strategy

Competence Units (S/NVQ)

Business Administration

Customer Service SVQs

Management and Leadership

April 2015

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1. Introduction

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

This document outlines Skills CFA principles in regards to:

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

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

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

2. External quality control of Assessment

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

2.1 External Verification

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

2.2 Risk Assessment

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

2.3 Data Requests

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

3. Requirements of assessors, EQAs and IQAs

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

3.1 Assessors

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

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

To be able to assess candidates, assessors must:

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

AND ONE OF EITHER OF THE FOLLOWING

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

OR

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

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

3.2 External quality assurer (EQA)¹

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

EQAs must:

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

AND ONE OF EITHER OF THE FOLLOWING

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA² 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.

¹ Also known as External Verifier (EV)

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

3.3 Internal quality assurer (IQA)³

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

IQAs must:

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

AND ONE OF EITHER OF THE FOLLOWING

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA⁴ 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.

³ Also known as Internal Verifier (IV)

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

4. Evidence

4.1 Evidence from Workplace Performance

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

4.2 Simulation

- Simulation can be applied to all QCF units listed in *Appendix B*.
- Where simulation is used for QCF units at Level 2 and above, it should only form a small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). 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

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 a 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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