

Level 3 Diploma for Customer Service Specialists (2794-03)

Version 1.2 (July 2019)

Qualification Handbook

Qualification at a glance

Subject area	Customer Service and Contact Centre
City & Guilds number	2794
Age group approved	16-18, 19+
Entry requirements	None
Assessment types	Portfolio
Approvals	Fast track approval
Support materials	SmartScreen; Sample Assessment
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	GLH	TQT	City & Guilds qualification number	Ofqual accreditation number
Level 3 Diploma for Customer Service Specialists	230	504	2794-03	603/3641/9

Version and date	Change detail	Section
1.0 September 2018	Handbook produced.	All
1.1 February 2019	Mapping document to apprenticeship standard added	Appendix 1
1.2 July 2019	Learning outcome 1 numbering in unit 311 amended as it incorrectly displayed as outcome 3 previously	5

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1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who is the qualification for?	<p>The qualification is for anyone who is involved in any customer specialist role, such as customer service manager, customer service team leader and customer service executive. These could be in any types of environment including contact centres, retail, webchat, service industry or any customer service point.</p> <p>As part of the role the customer specialist acts as a point of contact to support customers and colleagues with complex requests, complaints and queries, also implementing changes to improve services.</p>
What does the qualification cover?	<p>The qualification covers a range of topics:</p> <ul style="list-style-type: none">• Developing self• Customer service legislation, regulation, policies and procedures• Effective team working• Brand, image and reputation• Business knowledge and understanding in a customer service environment• Specialist customer service knowledge and skills• Handling and resolving complex customer service issues• Improvement to customer service delivery
What opportunities for progression are there?	<p>On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:</p> <ul style="list-style-type: none">• Level 4 higher apprenticeship in business and professional administration• Level 4 ILM Diploma in leadership and management• Level 5 Operations/ Departmental manager• Qualifications in other work-related areas (for example Project Management, Retail, Sales, Social Media, Team Leading, coaching and mentoring and other technical areas.)
Who did we develop the qualification with?	<p>The qualification was developed in consultation with employers, training providers and colleges. The requirements of the Customer Service Specialist standard were also considered to ensure this qualification would support the</p>

Area	Description
	candidates working on this Apprenticeship standard.
Is it part of an apprenticeship framework or initiative?	This qualification is not part of the Customer Service Specialist Apprenticeship Standard Endpoint Assessment but it is a stand-alone qualification that can support those on the Apprenticeship. This qualification is also for those not on an Apprenticeship who wish to work towards a Customer Service qualification.

Qualification Structure

Learners must complete 301-308 and one unit from (309 -315)

Level 3 Diploma for Customer Service Specialists

City & Guilds unit number	Unit title	GLH
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Mandatory

301	Developing self	25
302	Customer service legislation, regulation, policies and procedures	20
303	Effective team working	25
304	Brand, image and reputation	25
305	Business knowledge and understanding in a customer service environment	40
306	Specialist customer service knowledge and skills	20
307	Handling and resolving complex customer service issues	20
308	Improvement to customer service delivery	35

Optional

309	Team leading	30
310	Retail operations	30
311	Planning and implementation of a sales campaign(s)	30
312	Marketing management	35
313	Use of social media in own organisation	30
314	Project management	20
315	Coaching and mentoring	30

Total Qualification Time

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT is comprised of the following two elements:

- 1) the number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and
- 2) an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by - but, unlike Guided Learning, not under the immediate guidance or supervision of - a lecturer, supervisor, tutor or other, appropriate provider of education or training.

Title and level	GLH	TQT
Level 3 Diploma for Customer Service Specialists	230	504

2 Centre requirements

Approval

If your Centre is approved to offer the Level 3 Diploma in Customer Service (5530 - 03) qualification then you can apply for the new Level 3 Diploma for Customer Service Specialists (2794-03) approval using the fast track approval form, available from the City & Guilds website.

Centres should use the fast track form if:

- there have been no changes to the way the qualifications are delivered, and
- they meet all of the approval criteria in the fast track form guidance notes.

Fast track approval is available for 12 months from the launch of the qualification. After 12 months, the Centre will have to go through the standard Qualification Approval Process. The centre is responsible for checking that fast track approval is still current at the time of application.

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the Centre Manual - Supporting Customer Excellence, for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the area[s] for which they are delivering training and/or have experience of providing training. This knowledge must be at least to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Assessors and internal quality assurers

Centre Assessors and Internal Quality Assurers (IQAs) should hold, or be working towards, the relevant Assessor/Internal Quality Assurer TAQA qualification for their role in delivering, assessing and quality assuring this qualification and meet the relevant experience requirements above.

The primary responsibility of an Assessor is to assess candidate's 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 standard. Assessors therefore need to have a thorough understanding of assessment and quality

assurance practices, as well as in depth technical understanding related to the qualifications for which they will be assessing candidates.

Assessors must:

- Hold (or be working towards) an appropriate qualification confirming their competence to assess candidates undertaking competence-based units and qualifications.

Assessors working towards an appropriate qualification must:

- have their decisions countersigned by a suitably qualified assessor/quality assurer.

Assessors holding older qualifications must:

- be able to demonstrate that they are assessing to the current standards.
- be occupationally competent or have the necessary and sufficient experience of the role for which they intend to undertake assessments.

This include assessing the level and scope of individual candidate performance at work or in a Realistic Working Environments (RWEs) and judgements about the quality of assessment and the assessment process.

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

Learner entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully.

Age restrictions

City & Guilds cannot accept any registrations for learners under 16 as these qualifications are not approved for learners under 16.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs
- any support and guidance they may need when working towards their qualifications
- any units they have already completed, or credits they have accumulated which are relevant to the qualifications
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualification[s], their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

The following resources are available for these qualifications:

Description	How to access
SmartScreen	www.smartscreen.co.uk
Sample Assessment	www.cityandguilds.com

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems, including our own, Learning Assistant, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: www.cityandguilds.com/eportfolios.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate. Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4 Assessment

Summary of assessment methods

Candidates must:

- successfully completed a portfolio of evidence for each mandatory unit (units 301-308) and
- successfully complete a portfolio of evidence for one optional unit from 309-314 **or** one online multiple choice test for optional unit 315.

Assessment strategy

Portfolio Evidence:

- 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 competence units.
- These conditions would be those typical of 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.

Simulation:

- Where simulation is used, it should be used sparingly and should only form a very 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. RWE must be discussed and agreed with the EQA.

Evidence Requirements

Evidence requirements have been included for each Customer Service Specialist unit.

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

Naturalistic observation of workplace activities:

Assessors must provide information about the context of the assessment.

Products:

Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records.

Expert witness:

Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.

Witness testimony:

Can provide valuable evidence of candidate competence. In line with established principles, witness testimony must be:

- a clear, authentic statement indicating how the learner carries out their job
- dated, signed and include the job title of the witness.

Candidate reports (feedback):

Oral or written reports from the candidate which involve descriptions of activities and processes and some self-assessment, e.g. a work diary.

Reflective accounts:

A reflective account is usually a write up of how a candidate has carried out part of their job, recording events that actually happened. Where possible, the account should state why the candidate took the actions they did.

Professional discussion:

Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.

Verbal / written questions:

Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge. Questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate.

Projects:

An extended piece of practical and / or written work involving planning and research, generally presented as a report.

Assignments:

May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.

Case studies:

An effective case study report should:

- clearly identify the core problem(s)
- analyse the issues underlying the problem
- discuss and justify alternative solutions using theory / experience
- present feasible recommendations
- be presented in an appropriate format

Audio / video recordings:

May be used to support observation reports, examination of work products and knowledge questionnaires.

Simulation / role play:

A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment'

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit.

The most appropriate forms of evidence should be selected for each unit or part of a unit.

Test Specifications

The way the knowledge is covered by each test is laid out in the table(s) below:

Test: 315	Duration: 45 minutes		
Unit	Outcome	Number of questions	%
315	1 understand the principles and process of coaching in the workplace	15	50
	2 understand the principles and process of mentoring in the workplace	15	50
Total		30	100

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience, or qualifications which have already been achieved, to contribute to a new qualification.

For this qualification, RPL is allowed and is not sector specific.

<http://www.cityandguilds.com/delivering-our-qualifications/centre-development/centre-document-library/policies-and-procedures/quality-assurance-documents>

5 Units

Availability of units

The units for Level 3 Diploma for Customer Service Specialists are available in this document.

Structure of the units

These units each have the following:

- City & Guilds reference number
- Title
- Level
- Guided learning hours (GLH)
- Assessment method
- Learning outcomes, which are comprised of a number of assessment criteria

Centres must deliver the full breadth of the range. Specialist equipment or commodities may not be available to all centres, so centres should ensure that their delivery covers their use. This may be covered by a practical demonstration (e.g. video). For the practical assessments of this qualification, centres should ensure that there are sufficient resources to complete all tasks but are not required to use all the equipment or commodities in the range.

Unit 301

Developing self

Unit level:	Level 3
GLH:	25
Unit aim:	<p>This unit aims that upon completion, learners will have identified their own role and responsibilities, goals and development needs. Learners will understand how to use self-assessment techniques in setting development needs within an agreed personal development plan. Learners will be required to take ownership of own performance and development while maintaining and updating their development plan.</p> <p>This unit is expected to be worked on throughout the learner programme.</p>
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand the process required in improving personal and professional development in terms of own industry.

Assessment criteria

The learner can:

- 1.1 Describe own role and responsibilities
- 1.2 Identify knowledge and skills necessary in own customer service role
- 1.3 Identify sources of help and information
- 1.4 Explain how sources of help and information can be used to improve personal and professional development

Range

(AC1.1) **Role and responsibilities:**

- level of own authority
- reporting to

(AC1.3) **Sources of information:**

- internal eg
 - induction
 - intranet
 - company manuals
 - training manuals

- colleagues
- management
- training /learning and development department
- Human Resources

- external eg
 - Internet
 - trade associations
 - trade manuals
 - training provider
 - professional organisations
 - competitor information
 - social media
 - government bodies
 - independent advice and guidance bodies

Learning outcome

The learner will:

- 2 Prepare a personal development plan, based on self-assessment.

Assessment criteria

The learner can:

- 2.1 Carry out a self-assessment analysis
- 2.2 Select development activities to improve and update customer service knowledge and skills
- 2.3 Agree a personal development plan with the appropriate person
- 2.4 Achieve goals by implementing activities in agreed personal development plan
- 2.5 Review and update agreed personal development plan to show progress and achievement

Range

(AC2.1) **Self-assessment analysis eg:**

- Strengths Weaknesses Opportunities Threats (SWOT)
- self-evaluation
- own customer service skills and knowledge
- future career aspirations

(AC2.2) **Development activities eg:**

- mentoring
- shadowing
- research
- on/off job training
- project management
- secondment
- job experience
- qualifications /courses (mandatory and/or optional)

(AC2.2) **Customer service knowledge and skills:**

- organisational good practice
- industry requirements
- best practice

(AC2.3) **Personal development plan** (to include a range of activities in relation to own):

- business needs and goals
- personal learning and development needs
- personal goals
- SMART goals
- improving and updating own customer service knowledge, skills and behaviours

Appropriate person eg:

- manager
- supervisor or team leader
- a colleague assigned to help you learn
- mentor
- human resources
- training/ learning provider

(AC2.5) **Review and update:**

- with appropriate person/s
- with agreed review dates
- proactively

Unit 301

Developing self

Supporting Information

Evidence requirements

This unit is expected to be worked on throughout the learner programme.

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include personal research resulting in:

- reflective journal/log
- job description/ role profile
- product evidence of self-assessment, personal development plans/ career development plan * from beginning to end showing progress, changes and achievements.
- Continuous Professional Development record/log
- Witness testimony
- Recorded video/discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will be used to complete the Personal Development Plan required in outcome 2. The learner will need to clearly understand their own role and responsibilities and ensure all evidence produced relates to that role and can be used in outcome 2.

Outcome 2

It is expected that the evidence for this outcome will be generated from the beginning of the qualification and worked on until its final sign off. A self-assessment analysis will be used to select the development activities the learner will need to undertake to improve and update own customer service knowledge and skills required for the job role. Following the selection of development activities, the learner will discuss and agree them with the appropriate person to jointly agree a personal development plan (PDP). This development plan will require to be continually updated with activities achieved, as well as new activities added if needed. The PDP will contain progress to completion of this qualification and therefore this unit cannot be signed off until the full qualification is about to be signed off. The PDP will be the last piece of evidence to be assessed and placed in the evidence folder.

Unit 302

Customer service legislation, regulation, policies and procedures

Unit level:	Level 3
GLH:	20
Unit aim:	This unit aims to develop the learner's knowledge and understanding of the legislation, regulation and organisational factors that influence own customer service delivery. Learners will act in a manner that supports equality, diversity and inclusion.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand the influence and impact of legislation, regulation and organisational factors on own customer service delivery.

Assessment criteria

The learner can:

- 1.1 Explain the influence of current health and safety legislation
- 1.2 Explain the influence of current equality legislation
- 1.3 Explain the implications of current consumer-related and data protection regulation
- 1.4 Describe organisational and external factors that impact on customer service delivery
- 1.5 Explain the importance of keeping current knowledge and understanding of regulatory considerations, drivers and impacts

Range

(AC1.1) **Influence of health and safety legislation** (on):

- customers (internal/ external)
- employees
- organisation

(AC1.2) **Influence of equality legislation:**

- why it is important to treat customers as individuals
- how customer expectations can differ between protected characteristics

(AC1.3) **Implications** (for):

- customers (internal/ external)
- employees
- organisation

(AC1.4) **Organisational factors:**

- service standards
- systems and technology
- policies, processes and procedures (including confidentiality policy and escalation procedures)

External factors:

- PESTLE:
 - Political
 - Economic
 - Social
 - Technological
 - Legal
 - Environmental

(AC1.5) **Importance (for):**

- customers (internal/ external)
 - employees
 - organisation
-

Learning outcome

The learner will:

- 2 Support equality, diversity and inclusion in own delivery of customer service.

Assessment criteria

The learner can:

- 2.1 act in a manner that supports equality, diversity and inclusion
- 2.2 demonstrate adaptability and flexibility to meet customers' individual needs
- 2.3 work within the customer service environment adhering to organisational policies and/or procedures
-

Range

(AC2.2) **Adaptability and flexibility eg:**

- enthusiastic
- open-minded
- positive
- empathetic
- respectful

(AC2.3) **Organisational policies and/or procedures eg:**

- equality/ diversity/ inclusion
 - HR policies
 - data protection and confidentiality
 - customer service
 - communication policy
-

Unit 302

Customer service legislation, regulation, policies and procedures

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. Multiple examples of workplace evidence are required and could include:

- Reflective account
- Product evidence eg organisational policies and procedures, service standards
- Witness testimony
- Observation
- Recorded/professional discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will include research on legislation, regulation and organisational factors in relation to own organisation and role.

Outcome 2

Learners will need to be able to identify current health and safety, equality, data protection and consumer related legislation to consider in customer service delivery in their own organisation.

It is expected that the evidence for this outcome will be observation supported by witness testimonies and/or recorded/professional discussion along with a reflective account.

Unit 303

Effective team working

Unit level:	Level 3
GLH:	25
Unit aim:	This unit aims to develop the knowledge and understanding required to work effectively in teams by working collaboratively with colleagues at all levels to achieve results. The learner will share knowledge and experience with others to support colleagues' development. Learners will explore a range of leadership styles to suit a customer service environment.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand a range of leadership styles in own customer service environment

Assessment criteria

The learner can:

- 1.1 Analyse different leadership styles
- 1.2 Explain how leadership styles affect the dynamic of own team
- 1.3 Explain how leadership styles affect the performance of own team
- 1.4 Identify which leadership styles can be successfully applied in own customer service environment

Range

(AC1.1- 1.3) **Leadership styles eg:**

- autocratic
- democratic
- strategic
- transformational
- cross-cultural
- facilitative
- laissez-faire

(AC1.2) **Affect the dynamic:**

- positive
- negative

- team relationship

(AC1.3) **Performance** (individual and organisational) **eg:**

- Key Performance Indicators (KPIs)
 - targets
 - goals
 - reviews
 - supervision
-

Learning outcome

The learner will:

- 2 Understand the benefits of working collaboratively with colleagues within own organisation

Assessment criteria

The learner can:

- 2.1 Explain the importance of teamwork in a customer service environment
 - 2.2 Evaluate the benefits of sharing knowledge and experience with colleagues
 - 2.3 Recognise colleagues as internal customers
 - 2.4 Recognise the value of working collaboratively with colleagues at all levels
-

Range

(AC2.1) **Importance of teamwork eg:**

- shared goals
- motivation
- job satisfaction
- distribution of workload
- recognition of skills
- improved communication
- recognising boundaries

(AC2.2) **Benefits of sharing knowledge and experience eg:**

- personal/colleague/team development
- improvement of customer service delivery
- effective handover

(AC 2.3) **Internal customers eg:**

- other teams/cross teams
- other departments
- other functions
- parent companies
- partnership organisations

(AC2.4) **Value:**

- meeting customer expectations
 - improved customer service delivery
-

Learning outcome

The learner will:

- 3 work with colleagues at various levels in own organisation to achieve results

Assessment criteria

The learner can:

- 3.1 Demonstrate collaborative teamwork to achieve results
- 3.2 Share knowledge and experience to improve customer service delivery
- 3.3 Support colleagues to inform personal development

Range

(AC 3.1-3.3) The above need to be covered with colleagues at a range of varying levels within own organisation

(AC 3.2) **Share knowledge eg:**

- resources
- legislation
- working practice
- support mechanisms
- policies and procedures

Experience eg:

- lessons learnt
- share anecdotes
- positive outcomes
- developing resilience
- dealing with difficult situations

(AC 3.3) **Support:**

- coach/mentor
- build trust/rapport
- encourage questions
- demonstrate processes
- explain requirements

Inform personal development of colleagues.

Unit 303

Effective team working

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include the following:

- Reflective account
- Witness statements
- Work products eg performance review, team meetings minutes, email trail
- Presentation on leadership styles
- Observation
- Recorded discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected the evidence for this outcome will include research on different leadership styles. This research is expected to contribute to the evidence requirements for Outcomes 2 and 3.

Outcome 2

Learners will be expected to provide a reflective account or team log demonstrating the perceived benefits of working in team-based activities.

Outcome 3

It is expected that naturally occurring task-based evidence will be generated to demonstrate collaborative and supportive working with team colleagues at various levels to achieve results.

Evidence for this unit will be supported by observation, witness testimonies and/or recorded/professional discussion along with a reflective account of the team goals, activities and results.

Unit 304

Brand, image and reputation

Unit level:	Level 3
GLH:	25
Unit aim:	This unit aims to develop knowledge and understanding of how an organisation presents its brand, image, values and beliefs to develop, maintain and improve customer loyalty and retention. It aims to ensure that the learner is able to demonstrate professional behaviour that reflects the organisation's brand, values and beliefs.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand the importance of own contribution to organisation's brand and links to customer loyalty, retention and satisfaction

Assessment criteria

The learner can:

- 1.1 Explain own organisation's brand
- 1.2 Evaluate how own personal presentation impacts on organisation's brand
- 1.3 Explain how personal behaviour reflects brand, values and beliefs
- 1.4 Evaluate how building trust, credibility and customer satisfaction supports brand image
- 1.5 Explain the drivers of improvement in customer retention, loyalty and satisfaction

Range

(AC1.1) **Organisation's brand:**

- image
- mission statement
- values
- beliefs
- reputation
- ethics

(AC1.2) **Personal presentation eg:**

- dress code
- compliance with brand values
- body language

- written and verbal communication

(AC1.3) **Personal behaviour:**

- brand advocacy
- on-line
- on site
- off site

(AC1.5) **Drivers:**

- customer expectations
 - brand consistency
 - organisational expectations
 - internal quality assurance
 - external factors
-

Learning outcome

The learner will:

- 2 Behave in a way that represents own organisation's brand, values and beliefs

Assessment criteria

The learner can:

- 2.1 Demonstrate professional image which reflect own organisation's brand
 - 2.2 Demonstrate behaviour that promotes own organisation's brand
 - 2.3 Demonstrate how trust, credibility and satisfaction are built
-

Range

(AC2.1) **Professional image eg:**

- brand compliance
- use of social media
- respect
- personal presentation

(AC2.2) **Behaviour eg:**

- attitude
- respect
- deliver on promises
- communication skills

Unit 304

Brand, image and reputation

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. Multiple examples of workplace evidence are required and could include:

- Reflective account
- Product evidence eg brand, values, beliefs, mission statement
- Witness testimony
- Observation
- Recorded/professional discussion
- Or a combination of the above

Unit guidance

Outcomes 1

It is expected that the evidence for this outcome will include research on the importance of a brand and how it can drive customer loyalty, retention and satisfaction.

Outcome 2

It is expected that the evidence for this outcome will be observation supported by witness testimonies and/or recorded/professional discussion. Product evidence of the organisation's brand, values, beliefs will be required.

Unit 305

Business knowledge and understanding in a customer service environment

Unit level:	Level 3
GLH:	40
Unit aim:	This unit aims to develop knowledge and understanding of the business strategy, environment, structure and culture of own organisation. The learner will develop an understanding of the factors that influence the operation of own organisation's customer service provision. The learner will consider the impact own service provision has on the wider organisation and the value it adds. The learner will also develop an understanding of the role each department needs to play in delivering customer service and the causes and consequences of service failure.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery

Assessment criteria

The learner can:

- 1.1 Explain own organisation's mission statement and its purpose
- 1.2 Explain the business strategy of own organisation
- 1.3 Explain the position of customer service within own organisation's culture
- 1.4 Describe how the organisation's business strategy and mission statement impact on own delivery of customer service
- 1.5 Identify the internal and external factors influencing the business environment and culture of own organisation
- 1.6 Explain the impact of internal and external factors on the positioning of customer service within own organisation

Range

(AC1.1, 1.4) **Mission statement:** can be formal or informal depending on the organisation.

(AC 1.2) **Business strategy:**

- aims and objectives
- short term plans
- long term plans

(AC1.4) **Internal and factors:**

- PESTLE:
 - Political
 - Economic
 - Social
 - Technical
 - Legal
 - Environmental
 - SWOT
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
-

Learning outcome

The learner will:

- 2 Understand the impact own service provision has on the wider organisation and the value it adds

Assessment criteria

The learner can:

- 2.1 Describe own customer service role within the organisation
 - 2.2 State own organisation's expected standard of customer service delivery
 - 2.3 Describe how own customer service delivery affects different departmental role within the organisation
 - 2.4 Explain the value own service provision adds to the organisation
-

Range

(AC2.2) **Expected standard eg:**

- service level agreement
- policies and procedures
- customer charter

(AC2.3) **Departmental roles eg:**

- sales
 - marketing
 - distribution
 - contact centre
 - human resources
 - finance
 - production/manufacturing
-

Affects:

- positive
- negative

(AC2.4) Value eg:

- revenue
 - reputation
 - brand/image
 - customer satisfaction
-

Learning outcome

The learner will:

- 3 Understand own organisational structure and the role each department needs to play in delivering customer service

Assessment criteria

The learner can:

- 3.1 Describe types of organisational structures
 - 3.2 State the type of structure own organisation follows
 - 3.3 Describe the influence of functions/departmental roles within own organisation
 - 3.4 Explain the importance and influence of effective communication among internal departments
 - 3.5 Identify potential causes of service failure and their consequences.
-

Range**(AC3.1, 3.2) Organisational structures eg:**

- functional
- divisional
- bureaucratic
- matrix
- network
- centralised
- decentralised
- hierarchical
- flatarchy

(AC3.3) Functions/departmental eg:

- sales
 - marketing
 - distribution
 - contact centre
 - human resources
 - finance
 - production/manufacturing
 - other branches
-

(AC3.4) **Communication:**

- formal
- informal
- written
- non-verbal
- verbal

(AC3.5) **Potential causes eg:**

- communication barriers
- team dynamics
- organisational
- non-compliance
- limits of authority

Potential consequences eg:

- Misunderstanding
- Team breakdown
- Reduced performance
- Missed targets/KPIs
- Internal/external audits
- Dissatisfied customers
- PR disasters

Unit 305

Business knowledge and understanding in a customer service environment

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include personal research resulting in:

- Reflective account
- Job description/role profile
- Service standards
- Product evidence of mission statement, business strategy, SWOT and PESTLE analysis, organisation charts
- Witness testimony
- Recorded/professional discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will include research into own organisation's business strategy. Evidence for this outcome will include research into own business environment, culture and the position of customer service within it.

Outcome 2

It is expected that the evidence for this outcome will include exploration of own service provision and its impact and value.

In an organisation with no other department /stakeholder(s) the learners can discuss the impact of their own customer service delivery on colleagues instead.

Outcome 3

It is expected that the evidence for this outcome will include research into own organisational structure and the role each department plays in delivering customer service. It should include the consequences should things go wrong.

In an organisation with no other department /stakeholder(s) the learners can discuss the role and impact each colleague plays in the delivery of customer service.

Unit 306

Specialist customer service knowledge and skills

Unit level:	Level 3
GLH:	20
Unit aim:	<p>This unit aims to ensure the learner can adapt to the emotions, behaviours and expectations of different customer types along their customer journey. Learners will also be able to use advanced communication skills, including negotiation and influencing, to reach outcomes that balance the needs of the customer and the organisation.</p> <p>This unit links particularly well to unit 307 and 308</p>
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 understand how to adapt to the emotions, behaviours and expectations of own customers.

Assessment criteria

The learner can:

- 1.1 Analyse a variety of customer types, including potential needs and expectations
- 1.2 Evaluate the possible customer journeys relevant to own organisation
- 1.3 Explain when customer emotions can be affected by the level of service offered
- 1.4 Explain how adapting to emotions and behaviours can support a successful outcome.

Range

(AC1.1) **Customer types eg:**

- internal
- external
- new
- existing/loyal
- on-line
- face-to-face
- aggressive
- passive
- assertive

- decisive/indecisive
- challenging
- those with:
 - special requirements
 - language barriers

Expectations can differ between:

- social profiles
- cultures
- demographics

(AC1.2) **Customer journeys** (to include):

- challenges
- end-to-end experience
- highs and lows

Types of journeys eg:

- cyclical
- linear
- seasonal
- touch points

(AC1.3) **Emotions eg:**

- happiness
- confidence
- anger
- sadness
- fear
- disappointment
- satisfaction/ dissatisfaction

(AC1.4) **Successful outcome** (for both customer and organisation).

Learning outcome

The learner will:

- 2 use a range of communication channels to support a positive customer outcome(s)

Assessment criteria

The learner can:

- 2.1 Follow own organisation's style in all communication
- 2.2 Adapt own communication channel to the situation and audience
- 2.3 Simplify complex information for customers

Range

(AC2.1) **Organisation's styles and formats:**

- house styles
- organisational compliance

Communication:

- verbal
- non-verbal
- written eg
 - customer records
 - letters
 - reports
 - e-mails
 - social media
 - web contact

(AC 2.2) **Channels eg:**

- electronic
- physical
- audio
- visual

Situation:

- difficult
- complex
- straight forward

Audience:

- internal
- external
- customer types

(AC2.3) **Simplify:**

- clearly
- concisely
- jargon-free
- simple and plain language
- in relevant format

Learning outcome

The learner will:

- 3 use advanced communication skills to reach mutually beneficial outcomes

Assessment criteria

The learner can:

- 3.1 Identify customer needs through advanced questioning and active listening skills
- 3.2 Demonstrate advanced negotiation and influencing skills
- 3.3 Apply solutions that are mutually beneficial to customer and own organisation
- 3.4 Summarise and agree outcomes
- 3.5 Escalate situations where necessary

Range

(AC3.1) **Advanced questioning eg:**

- probing
- leading
- contextualising
- para-phrasing

(AC3.2) **Advanced negotiation skills eg:**

- preparation
- adaptable and flexible
- hard negotiation
- mediation
- distributive
- soft negotiation
- integrative
- non-verbal cues

Advanced Influencing skills eg:

- persuasion
- building rapport
- transactional analysis
- reasoning
- assertiveness
- non-verbal cues

(AC3.3) **Solutions** (in line with organisational policies and procedures).

(AC3.4) **Outcomes:**

- mutually beneficial
- beneficial to customer
- beneficial to organisation

(AC3.5) **Situations:**

- challenging
- complicated
- limit of own authority.

Unit 306

Specialist customer service knowledge and skills

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. Multiple examples of evidence are required and could include:

- Reflective account
- Product evidence eg organisational policies and procedures with rationale for inclusion, communication trail, documented outcomes
- Witness testimony
- Observation
- Recorded/professional discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will include research into understanding how to adapt to the emotions, behaviours and expectations of at least **three** different customer types.

Outcome 2 and 3

It is expected that the evidence for outcomes 2 and 3 will be observation supported by witness testimonies and/or recorded/professional discussion.

Note: The evidence for this unit can be holistically assessed with unit 307 and 308, which are an extension of the skills and knowledge to then be applied to complex issues and recommendation for potential improvement(s).

Unit 307

Handling and resolving complex customer service issues

Unit level:	Level 3
GLH:	20
Unit aim:	<p>Complex issues will often arise from exceptions to normal company policies and procedures. If a customer presents a problem, it may well escalate into a complaint if not handled appropriately. This unit aims to ensure the learner can handle complex and challenging situations by building and maintaining a positive customer relationship. The learner will be required to deal with escalations and referrals in line with organisational policy.</p> <p>This unit links particularly well to unit 306 and 308.</p>
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Deal with escalation and/or referrals in line with own organisation's policy

Assessment criteria

The learner can:

- 1.1 Describe the organisational policies and procedures supporting the handling of complex issues
- 1.2 Review interactions with customers
- 1.3 Identify trends and/or reoccurring issues customers have encountered
- 1.4 Identify potential challenges in resolving the escalations and/or referrals
- 1.5 Determine actions to be taken in line with own organisation's policy and procedures
- 1.6 Identify when customer issues and complex situations require referral or escalation

Range

(AC1.1) **Organisational policies and procedures eg:**

- refund
- compensation
- return/exchanges
- complaints
- internal/external service level agreement

(AC1.2) **Interactions:**

- customers' history
- reoccurring issues
- past and present issues
- relevant information, records

(AC1.3) **Trends and/or reoccurring issues** (where cases have been escalated or referred).

(AC1.4) **Potential challenges eg:**

- balancing organisational and customer needs
- Service Level Agreement
- organisational policies and procedures
- legislation and regulatory requirements
- code of practice
- customer type

(AC1.4, 1.6) **Referral or escalation** (for specialist attention eg to manufacturer)

Learning outcome

The learner will:

- 2 Build and maintain a positive relationship with customers when handling complex and challenging issues

Assessment criteria

The learner can:

- 2.1 Establish a positive rapport with customers when dealing with complex issues
- 2.2 Take ownership and responsibility to resolve customers' issues
- 2.3 Maintain a positive manner when unable to meet customers' expectations

Range

(AC2.1) **Positive rapport:**

- Actively listen and make notes
- Acknowledge customer's concerns and thank them
- Ask questions and summarise understanding
- Apologise for inconvenience without admitting liability
- Keep customers informed and up-to-date
- Adapt communication style

(AC 2.1, 2.2) **Issues eg:**

- challenging
 - emotional or unreasonable customer behaviour
- unresolved or reoccurring problems
- complaints about goods and/or service
- complaints about a staff member
- any other issues arising, relevant to own role

(AC2.2) **Ownership and responsibility:**

- level of authority
- proactivity
- creativity
- accountability
- reliability
- integrity

Resolve:

- making realistic promises
- keeping promises

Unit 307

Handling and resolving complex customer service issues

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include personal research resulting in:

- Reflective account
- Witness statements
- Observation
- Work products eg customer records, policies and procedures
- Recorded discussion
- Or a combination of the above.

Unit guidance

Outcome 1 and 2

The learner is expected to show they have dealt with a range of complex and challenging issues applying options and solutions to meet the needs of both the customer and own organisation.

The evidence will demonstrate how the learner has made realistic promises and kept the customer up to date following own organisation's procedures. Evidence will also include recognition of when they have not been able to meet the customer expectations and how they have managed this in a positive manner.

Unit 308

Improvement to customer service delivery

Unit level:	Level 3
GLH:	35
Unit aim:	<p>This unit requires the learner to gather, analyse and interpret customer feedback. They will demonstrate an understanding for the need of continuous improvement, including any impacts on self and own organisation. They will also recommend a service related improvement(s), taking into consideration customer and organisational needs.</p> <p>This unit links particularly well to unit 306 and 307.</p>
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Interpret customer feedback gathered using a variety of methods.

Assessment criteria

The learner can:

- 1.1 Identify the importance of obtaining customer feedback
- 1.2 Identify methods for collecting customer feedback
- 1.3 Collect feedback from customers to gain information on their experience
- 1.4 Evaluate the meaning and implication of feedback obtained

Range

(AC1.1-1.4) **Customer feedback:**

- formal
- informal
- verbal
- written
- positive
- negative

(AC1.2) **Methods eg:**

- questionnaire/survey
- focus group
- comments cards
- telephone/text

- on-line
 - mystery shopper
- (AC1.3) **Feedback:**
- quantitative
 - qualitative
- Customers:**
- internal
 - external
- (AC1.4) **Evaluate:**
- trends
 - implications eg:
 - recommendations for improvement(s), change
 - cost
 - training requirements
 - resourcing
 - Strengths Weaknesses Opportunities Threats (SWOT)
 - good practice
-

Learning outcome

The learner will:

- 2 Understand the need for continuous service related improvement(s) including organisational implementation procedures

Assessment criteria

The learner can:

- 2.1 Explain the importance of continuous improvement(s) in the service provision
 - 2.2 Identify improvement models for continuous improvement
 - 2.3 Explain own organisation's procedures for recommending improvement(s)
 - 2.4 Describe what needs to be considered when recommending improvement(s)
-

Range

(AC2.1) **Continuous improvement(s) eg:**

- process/ method of working
- policies and procedures
- staff behaviours

(AC2.2) **Improvement models eg:**

- Route Cause Analysis (RCA)
- Total Quality Management (TQM)
- Six Sigma
- Crosby's 14 steps
- Lean Production
- Kaizen

(AC2.4) **What needs to be considered:**

- limit of authority
 - decision makers
 - legal/regulatory requirements
 - industry best practice
 - process
 - stakeholders
 - mission statement, core values
 - benefits to customers and organisation
 - customer satisfaction
 - added value
 - market share
 - disadvantages to customers and organisation
 - cost
 - impact on self and organisation
-

Learning outcome

The learner will:

- 3 Recommend a service related improvement(s)

Assessment criteria

The learner can:

- 3.1 Identify a potential improvement(s) to organisational customer service delivery based on evaluation of customer feedback
 - 3.2 Seek input from others to support the potential improvement(s)
 - 3.3 Follow organisational procedures for recommending the potential improvement(s)
 - 3.4 Produce a proposal for the potential improvement(s)
-

Range

(AC3.1-3.4) **Improvement(s) eg:**

- process/ method of working
- policies and procedures
- staff behaviours
- compliance with regulatory/legislative requirements
- industry good practice
- cost reduction
- balancing organisation and customer needs
- strategy

(AC3.2) **Others eg:**

- internal stakeholders
 - external stakeholders
-

Unit 308

Improvement to customer service delivery

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. Examples of workplace evidence could include the following:

- Reflective account
- Research on improvement models
- Work products eg policies and procedures, recommendation proposal
- Customer feedback analysis
- Presentation
- Or a combination of the above.

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will include the learner identifying methods of feedback, then gathering, analysing and interpreting customer feedback. The learner is expected to use a variety of methods to obtain this information from a range of customers. The learner is expected to analyse and evaluate and display this information in a format of own choice.

Outcome 2

It is expected that the evidence for this outcome will include research on the need for continuous service related improvement(s) including organisational implementation procedures and relevant improvement models.

Outcome 3

It is expected that the evidence for this outcome will include a formal proposal for recommending improvements following organisational procedures, including any justifications. However, the recommendation does not have to be implemented by the organisation, except where the proposal can be adopted to improve personal performance eg improve response time to customer query.

Unit 309

Team leading

Unit level:	Level 3
GLH:	30
Unit aim:	This unit aims to develop the underpinning knowledge and skills required to lead a team. Upon completion of this unit, learners will be able to allocate work, monitor progress and performance of a team ensuring objectives are met.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Understand the role of a team leader in a customer service environment and theoretical models and techniques

Assessment criteria

The learner can:

- 1.1 Explain team working theoretical models
- 1.2 Explain motivational models and techniques
- 1.3 Explain team leader responsibilities
- 1.4 Describe how a team leader ensures objectives are met

Range

(AC1.1) **Theoretical models:**

- Belbin
- Tuckman

(AC1.2) **Motivational models:**

- Maslow
- Herzberg

Motivational techniques:

- sharing best practice
- incentives
- achievement recognition
- reward

(AC1.3) **Team leader responsibilities eg:**

- planning work
- coordinating work

- checking work
- delegation of duties
- meeting of targets/goals
- coaching and mentoring of individuals

(AC1.4) **Objectives:**

- organisation's vision, mission and objectives
- goals (team and individual)
- targets (team and individual)

Learning outcome

The learner will:

2 Lead own team in the customer service environment

Assessment criteria

The learner can:

- 2.1 Identify the strengths and expertise of own team
- 2.2 Allocate work and responsibilities on the basis of expertise and knowledge
- 2.3 Support own team to achieve objectives, amending plans and priorities as required
- 2.4 Plan and agree performance improvement with team
- 2.5 Monitor team's progress and achievement in accordance with agreed plans
- 2.6 Provide recognition to the team on successful achievement

Range

(AC 2.1) **Strengths and expertise eg:**

- skills scan analysis

(AC2.2) **Allocate work and responsibilities (to):**

- team
- individual(s)

(AC2.3) **Support:**

- provide positive and constructive feedback to improve performance
- apply motivational techniques to achieve objectives
- maintain morale
- provide resources eg on-line material, information
- on-going coaching and mentoring

Objectives:

- team
- individual(s)
- organisation

(AC2.4) **Feedback:**

- to team(s)
- to individual(s)
- informal
- formal

(AC2.5) **Monitor eg:**

- one-to-one
- team meetings
- observation
- work shadow
- discussion

(AC2.6) **Recognition eg:**

- informal/formal
- incentives
- achievement recognition
- reward
- promotion

Unit 309

Team leading

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include:

- Reflective account
- Witness statements
- Work products eg skills scan, appraisals, record of reviews, support material, performance data
- Presentation on theoretical models and motivational techniques
- Recorded discussions
- SMART Objectives
- SWOT analysis
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome will include personal research into the role of a team leader and the responsibilities, including theoretical models and motivational techniques.

Outcome 2

It is expected to see research and evidence of identifying the strengths, and expertise of team members in relation to their team roles.

The learner is required to provide evidence that work has been correctly and appropriately allocated on the basis of the expertise and knowledge of individual team members, with explanations of why the work has been allocated in this way. The learner is expected to show evidence of supporting own team to achieve objectives and explanations of how, when and why they have amended plans and priorities to suit the needs of the business.

It is expected that the learner will provide evidence of feedback to the team and details of motivational techniques used to maintain morale, with evidence of individual recognition of achievement to be included.

Unit 310

Retail operations

Unit level:	Level 3
GLH:	30
Unit aim:	This unit aims to develop the learner's knowledge and skills when working in a retail environment, including payment transactions and stock control. This unit will also confirm the learner's ability to oversee the display of stock to a design layout.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Manage payment transactions in line with organisational procedures

Assessment criteria

The learner can:

- 1.1 Explain the procedures for dealing with payment transactions
- 1.2 Verify that payment point provides up-to-date pricing information
- 1.3 Support colleagues to set up and operate payment points
- 1.4 Monitor payment transactions
- 1.5 Resolve issues with payments
- 1.6 Resolve operational problems with payment points

Range

(AC1.1) **Payment transactions eg:**

- payment types
 - cash
 - cheques
 - debit cards
 - credit cards
 - on-line payment
 - loyalty cards
- refunds
- exchange
- discounts
- vouchers

(AC1.2) **Pricing information eg:**

- reductions
- new stock
- promotional discounts eg
 - Buy One Get One Free (BOGOF)
 - price matching
 - staff discount
 - loyalty discount

(AC1.3) **Support eg:**

- demonstrate
- supervise

(AC1.4) **Monitor eg:**

- observe
- quality
- audit checks
 - till balance

(AC1.5) **Issues with payments eg:**

- refunds
- card/payment type not accepted by organisation
- declined
- card limit
- floor limit
- fraudulent payment
- bounced cheques
- disputed cash payment

(AC1.6) **Resolve eg:**

- override transactions
- rebooting of system
- call support/engineer
- contingency plans eg:
 - use of second payment point
 - manual receipt book

Operational problems eg:

- limits of own authority
- print quality
- wi-fi/internet issues
- receipt paper re-fill

Learning outcome

The learner will:

2 Monitor the use of stock control in own organisation

Assessment criteria

The learner can:

2.1 Identify the types of stock stored

- 2.2 Describe organisational storage facilities
 - 2.3 Explain organisational stock control system
 - 2.4 Explain the legal and organisational requirements for storing stock
 - 2.5 Support colleague(s) in the use of the stock control system
 - 2.6 Perform spot checks of stock levels
-

Range

(AC2.2) **Storage facilities eg:**

- distribution centre
- warehouse
- stock room
- shop floor

(AC2.3) **System:**

- manual
- electronic

(AC2.4) **Legal and organisational requirements eg:**

- Consumer legislation
- Health and safety
- Waste management
- Out-of-date stock
- Faulty goods
- Excess stock

(AC2.5) **Support:**

- training
- supervision

(AC2.6) **Spot checks eg:**

- stock count
 - inventory management
 - correct storage method
 - stock rotation
-

Learning outcome

The learner will:

- 3 Oversee the set-up of stock display

Assessment criteria

The learner can:

- 3.1 Explain the importance of being creative when displaying stock
 - 3.2 Organise resources for agreed display complying with organisational procedures and health and safety requirements
 - 3.3 Ensure set up of display in line with the design layout
 - 3.4 Ensure the area is safe and cleared of any equipment/materials
-

Range

(AC3.1) **Being creative:**

- design principles eg:
 - Attention Interest Desire Action (AIDA)
- within constraints:
 - budget
 - season
 - space
 - point of sale

(AC3.2) **Resources:**

- people
- stock
- display material
- signage
- point of sale
- display area/space

(AC3.2) **Organisational procedures and health and safety requirements eg:**

- signs correctly displayed
- area closed off
- equipment monitored

(AC3.3) **Ensure set up of display eg:**

- use of safe working practices
- plan followed
- to deadline
- minimising inconvenience

Unit 310

Retail operations

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include:

- Reflective accounts
- Observation
- Product evidence
- Witness testimony
- Recorded video/discussion
- Research on design principles
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that the evidence for this outcome would include observation of the learner supporting colleagues with payment point setup and monitoring of colleagues processing payment transactions. Learners will also be expected to resolve issues with payments and operational issues with payment points, following contingency plans when required. Witness testimony and a reflective statement could be used together with observation and product evidence eg till records, audit documents, refund records, fault logs.

Outcome 2

It is expected that the evidence for this outcome would include observation of the learner supporting colleagues in the use of stock control systems that are in place. Learners are expected to perform spot check on stock levels, following legal and organisational requirements to the stock that is stored on the premises. Witness testimony and a reflective account could also be used together with eg video evidence, relevant product evidence.

Outcome 3

It is expected that the evidence for this outcome would include observation of the learner overseeing the organisation and display of stock, following organisational guidelines and procedures. Witness testimony and a reflective statement could also be used together with eg video evidence, relevant product evidence. Research on relevant design principles could be included.

Unit 311

Planning and implementation of a sales campaign(s)

Unit level:	Level 3
GLH:	30
Unit aim:	This unit aims to ensure the learner understands how to obtain and use sales related information on competitors, customers and markets to support the creation, implementation and evaluation of a sales campaign(s).
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 Prepare sales information to plan a sales campaign

Assessment criteria

The learner can:

- 1.1 Describe the information required on the organisation's customers, competitors and markets
- 1.2 Identify sources of information on the organisation's customers, competitors and markets
- 1.3 Obtain the information required on the organisation's customers, competitors and markets
- 1.4 Analyse information on the issues and trends which may impact on a sales campaign

Range

(AC1.1) **Information eg:**

- past, present and future
- sales data
- new products/services
- technology advancements
- internal
- external
- trends

(AC1.2) **Sources:**

- Internal sources eg
 - databases
 - customer records
 - sales reports

- External sources eg
 - journals
 - internet
 - competitors
 - company reports

(AC1.4) **Analyse:**

- SWOT
- PESTLE
- competitor analysis
- trend analysis

Learning outcome

The learner will:

- 2 understand the sales funnel

Assessment criteria

The learner can:

- 2.1 Describe the sales funnel models
- 2.2 Describe the phases of the customer experience within the sales funnel
- 2.3 Explain the effects of a range of factors on sales conversion rates

Range

(AC2.1) **Models eg:**

- Attention Interest Desire Action (AIDA)
- Suspects Prospects Leads Customers

(AC2.2) **Phases eg:**

- awareness
- consideration
- decision
- purchase
- evaluate
- loyalty

(AC2.3) **Factors eg:**

- initial impact
- skills set
 - training
 - experience
 - overcoming objections/barriers
 - asking for the sale
 - obtaining commitment
- clear defined goals
- target audience
- sales scripts
- consumer life cycle

- quantity of activities

Learning outcome

The learner will:

- 3 Implement a sales campaign and evaluate the results

Assessment criteria

The learner can:

- 3.1 Develop a sales campaign identifying potential target audiences and objectives
- 3.2 Identify the benefits of the product(s) and/or service(s) to the target audiences
- 3.3 Identify and plan to overcome potential objections and concerns
- 3.4 Introduce the campaign to the sales team
- 3.5 Respond to feedback and adapt plan as required
- 3.6 Evaluate the results of the sales campaign

Range

(AC3.1) **Sales campaign:**

- SMART objectives
- sales plan
 - potential add-ons
 - upselling
 - cross-selling

Target audiences eg:

- demographic
 - age
 - gender
 - income
- geographical
- psychographic:
 - culture
 - religion
 - life style

(AC3.3) **Potential objections and concerns eg:**

- price
- value
- timing

(AC3.5) **Feedback:**

- informal
- formal
- internal
- external

(AC3.6) **Evaluate:**

- against campaign objectives
- quantity

- quality

Unit 311

Planning and implementation of a sales campaign(s)

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include:

- Reflective account
- Witness statements
- Observations
- Work products eg sales figures, sales campaign, feedback, feedback analysis
- Professional/recorded discussions
- Or a combination of the above

Unit guidance

For this unit learners should be in the position to plan and implement a sales campaign(s) to meet the requirements of all the learning outcomes.

Outcome 1

It is expected to see research evidence on the information required to plan an effective sales campaign of a product/service within own organisation. Evidence of this research will include analyses of their organisation' own customers, competitors and the wider market.

Outcome 2

The learner is required to provide evidence to demonstrate their understanding of the use of a sales funnel within own organisation. They are expected to be able to describe the customer experience within their sales funnel(s) and the factors that could affect sales conversion rates.

Outcome 3

It is expected the learner will generate evidence to demonstrate they have planned a sales campaign, including the benefits for customers and how to overcome potential objections. The learner is required to present the campaign to the sales team for implementation and respond to feedback, adapting the plan if required. An evaluation of the sale campaign results will form part of the evidence for this outcome.

Unit 312

Marketing management

Unit level:	Level 3
GLH:	35
Unit aim:	This unit aims to develop knowledge to enable learners to gain understanding of a range of marketing models, principles, channels and methods. Learners will develop the analytical skills required to evaluate the organisation's strategic marketing plan. On completion of this unit, learners will be able to recommend improvements for future marketing planning.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 understand the principles of marketing

Assessment criteria

The learner can:

- 1.1 explain the application of marketing principles to an organisation
- 1.2 evaluate marketing models
- 1.3 explain the legal, regulatory and ethical requirements related to marketing

Range

(AC1.1) **Principles:**

- product
- price
- place
- promotion
- physical (evidence/environment)
- process
- people

(AC1.2) **Models eg:**

- Boston Matrix
- McKinsey 7s
- Attention Interest Desire Action (AIDA)
- Market Mapping

(AC1.3) **Legal requirements eg:**

- Health and Safety at Work Act
- Consumer law
- Copyright law
- Equality Act
- GDPR

(AC1.3) **Regulatory requirements eg:**

- Advertising Standards Authority (ASA) regulations
- industry specific regulators

(AC1.3) **Ethical requirements eg:**

- moral
 - political
 - environmental
 - Corporate Social Responsibility (CSR)
-

Learning outcome

The learner will:

- 2 Understand the activities that can be carried out by an organisation when developing its marketing strategy

Assessment criteria

The learner can:

- 2.1 Explain the difference between online and offline marketing channels
 - 2.2 Describe types of marketing methods
 - 2.3 Explain the advantages and disadvantages of organic and inorganic activities in digital marketing
 - 2.4 Describe the key elements an organisation can use to develop a marketing strategy
-

Range

(AC 2.1) **Marketing channels eg:**

- online:
 - websites
 - Search Engine Optimisation (SEO)
 - social media
 - forums
 - interest groups
 - offline:
 - networking
 - trade events
 - print media
 - tv/cinema/radio
 - outdoor media
-

(AC2.2) **Marketing methods eg:**

- digital marketing:
 - website update
 - blog post
 - vlogs
 - social media posts
 - email campaigns
- real world marketing:
 - flyers/posters
 - billboards
 - telemarketing
 - direct mail
 - vehicle livery

(AC2.3) **Digital marketing:**

- organic eg:
 - website traffic
 - blog/vlog following
 - download sign up
 - key words
- inorganic eg:
 - Pay Per Click (PPC)
 - Cost Per Click (CPC)
 - paid for advert
 - affiliateships

(AC2.4) **Elements of marketing strategy:**

- management:
 - SWOT
 - SMART objectives
 - KPIs
 - time frames
 - implementing
 - budget
 - monitoring
 - evaluating
- target audiences eg:
 - segmentation
- communication eg:
 - products/services
 - Unique Selling Point (USP)
 - Unique Service Offer (USO)
 - message
 - voice and tone (formal/informal)
- analytics eg:
 - traffic building
 - following
 - lead generation
 - web analytics
 - conversion analysis
 - Return On Investment (ROI)

Learning outcome

The learner will:

- 3 Evaluate the strategic marketing plan for a product or service within own organisation

Assessment criteria

The learner can:

- 3.1 Identify an existing strategic marketing plan previously implemented
- 3.2 Analyse the outcomes of the strategic marketing plan
- 3.3 Recommend improvements for the implementation of future strategic marketing plans
- 3.4 Share findings with stakeholder(s)

Range

(AC3.2) **Analyse:**

- content of plan
- objectives for the plan eg:
 - market share
 - increase sales
 - brand awareness
- results against expectations eg:
 - ROI
 - analytics

(AC3.4) **Share findings eg:**

- presentation
- report

Stakeholders(s) eg:

- team leader
- line manager
- other agreed person within own organisation.

Unit 312

Marketing management

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include:

- Reflective accounts
- Witness statements
- Work products eg examples of existing marketing plans, minutes from meetings
- Report/ Presentation
- Recorded/professional discussion
- Or a combination of the above

Unit guidance

Outcome 1

It is expected that learners will undertake personal research into the marketing principles and marketing models.

Outcome 2

In this learning outcome the terms 'digital' and 'real world marketing' are used. It is important for learners to understand that digital marketing is interchangeable with the term 'online' marketing, whilst real world marketing relates to 'offline' marketing.

Outcome 3

It is important to note that in this outcome learners are expected to evaluate an existing strategic marketing plan implemented in own organisation. The findings can be presented using the organisation's preferred method.

Unit 313

Use of social media in own organisation

Unit level:	Level 3
GLH:	30
Unit aim:	This unit aims to enhance the learner's knowledge and skills required to use social media effectively in own organisation. Upon completion of this unit, learners will be able to understand social media policies, etiquette and the different range of social media tools and platforms available. They will be able to monitor and analyse social media engagement.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 understand social media policies and etiquette for an organisation

Assessment criteria

The learner can:

- 1.1 describe the content of an organisation's social media policy
- 1.2 explain social media etiquette in a professional context
- 1.3 explain the importance of a social media policy
- 1.4 explain the consequences of not having a social media policy

Range

(AC1.1) **Policy Content eg:**

- policy scope
 - reason for policy
 - staff code of conduct
 - responsibilities
 - social media advice and guidelines
 - use of business social media accounts
 - personal social media accounts
 - security and data protection
 - consequences for breaching the policy

(AC1.2) **Etiquette eg:**

- professional behaviour
- use of language

- appropriateness of content
- volume of personal response
- abusive behaviour:
 - bullying
 - trolling
 - harassment

(AC1.3) **Importance of policy (to):**

- self
- internal stakeholder
- external stakeholder

(AC1.4) **Consequences of not having a policy eg:**

- staff may:
 - post inappropriate content
 - use personal social media accounts during work hours
 - use personal social media accounts to discuss the business
 - to the brand and reputation
- organisation may eg:
 - suffer bad publicity
 - lose business
 - lose share value

Learning outcome

The learner will:

- 2 Understand social media tools and platforms used in own organisation

Assessment criteria

The learner can:

- 2.1 describe a range of social media tools and platforms
- 2.2 describe the features of the tools and platforms
- 2.3 explain the factors own organisation considers when selecting tools and platforms

Range

(AC2.1) **Tools and platforms eg:**

- social networks
- newsletters
- blogs
- vlogs
- podcasts
- forums
- search engines

(AC2.3) **Factors eg:**

- target audiences
 - segmentation

- budget
 - setting limit
 - controlling spend
 - Return on Investment (ROI)
- time requirements
 - optimum post time
 - visibility window
- content plan eg:
 - visual
 - text
 - scheduling
- resources
- IT support
- management support

Learning outcome

The learner will:

- 3 Schedule and analyse social media in own organisation

Assessment criteria

The learner can:

- 3.1 Describe the tools used to schedule social media posts
- 3.2 Publish social media posts using scheduling tools
- 3.3 Monitor and respond to own social media posts
- 3.4 Monitor and respond to competitor's social media activity where relevant
- 3.5 Use analytical tools to measure results of scheduled social media posts

Range

(AC 3.1, 3.2) **Tools eg:**

- HootSuite
- Buffer
- Mail Chimp

(AC 3.3, 3.4) **Monitor eg:**

- reach
- engagement
 - likes
 - shares
 - follows
 - comments
 - download
 - sign up
 - donate
 - buy

Respond eg:

- follow up

- likes
- shares
- replies
- links
- auto response eg
 - chat bots
- live chat

(AC3.5) **Analytical tools eg:**

- Google Analytics
- Facebook Analytics
- Twitter Analytics
- Web analytics

Unit 313

Use of social media in own organisation

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. We expect that the evidence could include personal:

- Reflective accounts
- Witness statements
- Work products eg examples of screen shots using social media within own organisation, own organisation's social media policies, analysis of competitors, results of analytics
- Practical observation
- Recorded discussions
- Or a combination of the above

Unit guidance

Notes: For this unit learners should be in the position to schedule and monitor social media activities to meet the requirements of the learning outcomes.

Outcome 1

It is expected that the evidence for this outcome will include personal research of social media policies and etiquette in the use of social media.

Outcome 2

It is expected that the evidence for this outcome will include personal research of social media tools and platforms used in own organisation.

Outcome 3

Learners should provide evidence of social media scheduling, as well as results of the analysis of social media engagement.

Unit 314

Project management

Unit level:	Level 3
GLH:	20
Unit aim:	This unit aims to ensure the learner can demonstrate an understanding of project management. The learner will be able to plan, manage, review and evaluate a project.
Assessment method:	Portfolio of evidence

Learning outcome

The learner will:

- 1 undertake the planning of an organisational project

Assessment criteria

The learner can:

- 1.1 Define the purpose of the project
- 1.2 Conduct research on the project
- 1.3 Create an outline project plan including resources required
- 1.4 Discuss the outline with stakeholder(s)
- 1.5 Produce a plan using preferred tool(s)
- 1.6 Issue and discuss final plan with stakeholder(s), seeking agreement

Range

(AC 1.1-1.3) **Project(s):**

This can cover a project, or improvement to a process or to an operating practice. This applies throughout Learning Outcomes 1, 2, and 3.

(AC1.1) **Purpose eg:**

- what needs to be delivered/desired outcome
- how it will be delivered
- deadlines/milestones to be achieved
- people involved and roles
- potential savings
- risk analysis

(AC1.2) **Research eg:**

- stakeholder(s) details and expectations

- stakeholder(s) anticipated input
- potential barriers
- on feedback

(AC 1.3) **Resources eg:**

- facilities
- equipment
- staff
- budget

(AC 1.4, 1.6) **Stakeholder(s) eg:**

- customer
- users
- team members
- management
- suppliers
- others

(AC1.5) **Tool(s) eg:**

- Gantt chart
- scheduling
- work breakdown structure
- product breakdown structure
- risk register/log

Learning outcome

The learner will:

2 Manage agreed project effectively

Assessment criteria

The learner can:

- 2.1 Take responsibility for the implementation of the agreed project plan
- 2.2 Communicate on regular basis with stakeholder(s)
- 2.3 Delegate as necessary showing understanding of levels of authority
- 2.4 Review priorities, adjusting timelines and work as necessary
- 2.5 Discuss adjustments to the plan and implications with stakeholder(s)
- 2.6 Make project decisions throughout using information to make a sound judgement
- 2.7 Handover and close the project

Range

(AC2.1) **Implementation:**

- planning
- leading
- monitoring

(AC2.2) **Regular basis:** keeping stakeholder(s) informed even when no further progress has been made.

Stakeholders eg:

- customer
- team members
- management
- suppliers
- others

(AC2.3) **Levels of authority:**

- own
- others

(AC2.6) (Range of) **information eg:**

- cost
- priority
- barriers
- risks
- resources availability

(AC2.7) **Handover and close eg:**

- closure meeting
 - debrief
 - formal handover
-

Learning outcome

The learner will:

- 3 Evaluate the success of the project

Assessment criteria

The learner can:

- 3.1 discuss the steps taken in managing the project
3.2 identify what was successful and unsuccessful
3.3 discuss what changes could be made in any future planning
-

Range

(AC3.2) **Successful and Unsuccessful eg:**

- outcomes
 - timelines
 - to satisfaction of stakeholder(s)
 - to own satisfaction
 - to budget
 - facts
 - statistics
 - figures
 - results
 - reasons
 - within own control
 - outside own control
-

- feedback from others

(AC3.3) **Changes eg:**

- lesson learnt (log)

Unit 314

Project management

Supporting Information

Evidence requirements

Evidence for this unit will differ across different sizes and types of organisations. Multiple examples of workplace evidence are required and could include:

- Reflective account
- Witness statement
- Recorded/ Professional discussion
- Observation
- Work Products eg project plan, project outcomes, project evaluation
- Presentation
- Or a combination of the above

Unit guidance

Notes: the evidence for this unit must be the result of the learner undertaking a live project as part of their job role.

Outcome 1

It is expected to see evidence that sets out the research and purpose of the plan in an outline format for discussion with stakeholders. The final plan will be produced with stakeholder agreement using the learners preferred project management tools.

Outcome 2

The learner is required to provide evidence demonstrating own management of the project plan. Evidence generated is expected to show regular communications, reviews and amendments made justifying why changes were necessary. The learner is expected to complete a formal handover to close the project.

Outcome 3

It is expected the learner will evaluate the success of the project, presenting tangible facts and information to support their claims. Lessons learned on what was successful or not should be clearly presented along with what they would change in future planning activities.

Unit 315

Coaching and mentoring

Unit level:	Level 3
GLH:	30
Unit aim:	This unit allows learners to develop the knowledge and understanding of coaching and mentoring within the workplace. Learners will explore how coaching and mentoring is used in an organisation to support effective personal and professional development of its workforce.
Assessment method:	Online e-volve multiple choice test

Learning outcome

The learner will:

- 1 understand the principles and process of coaching in the workplace

Assessment criteria

The learner can:

- 1.1 Explain the purpose of coaching
- 1.2 Explain theoretical models for coaching
- 1.3 Explain the roles of the people involved in the coaching process
- 1.4 Describe the benefits and challenges of coaching
- 1.5 Explain the skills and qualities required for coaching

Range

(AC1.1) **Purpose:**

- improve individual performance
- enhance current skills
- acquire new skills
- unlock potential
- improve organisational performance
- contribute to a coaching culture
- stimulate motivation

(AC1.2) **Theoretical models:**

- GROW model (Goals, Reality, Options, Will)
- The STAR model (Situation, Task, Action, Result)
- PIGEEP (Preparation, Introduction, Goal, Explore, Evaluate, Plan)
- FUEL (Frame, Understand, Explore, Lay Out)

- ACHIEVE (Assess, Create, Hone, Initiate, Evaluate, Validate, Encourage)

(AC1.3) **Roles:**

- coach
- coachee

Process:

- identify purpose of coaching session
- review coachee's current situation
- identify aims and aspirations
- explore options
- develop a plan to achieve agreed objectives
- reflect and evaluate progress
- maintain records

(AC1.4) **Benefits:**

- to coach:
 - personal and professional development
 - improved cross working relationships
 - enhanced career opportunities
 - increased job satisfaction
 - access to training
 - broaden knowledge and skills
- to coachee:
 - increased self-confidence
 - increased self-awareness
 - increased decision making skills
 - improved employability
 - improved promotion opportunities
 - improved cross working relationships
 - improve own performance
- to organisation eg colleagues, line manager, project team, Senior Management Team (SMT):
 - improve performance, productivity
 - improve motivation of workforce
 - up skilled work force
 - increase potential to achieve aims and objectives
 - contribute to a coaching culture
 - improve working relationships

Challenges:

- resistance
 - to change
 - to options offered
- apathy/lack of aspiration
- lack of trust and/or respect
- personal beliefs
- attitudes and perceptions
- expectations (high or low)
- time constraints
- complex needs:
 - health issues
 - behavioural issues
 - language/learning barriers

- personal circumstances/responsibilities
- economic status

(AC1.5) **Skills:**

- communication skills
 - verbal
 - non-verbal
 - formal
 - informal
- active listening
- coaching style questions
 - probing
 - open
 - closed
 - leading
 - exploratory
 - funnel
- summarising
 - feedback
 - paraphrasing
- contextualising
 - anecdotal
 - story telling
 - scenarios
 - lessons learnt
- reflective practice
- ability to deal with conflict
- understanding of professional boundaries
 - maintain confidentiality
 - non-hierarchical relationship
- able to tailor techniques to meet individual needs
- planning and time management
- challenges negative beliefs and perceptions

Qualities:

- interpersonal skills
 - ability to build rapport
 - observes and responds to non-verbal signals
- stamina
 - resilience
- flexibility/adaptability
- motivational
 - encouraging
 - inspiring
 - builds on strengths
- non-threatening
- non-judgemental
- treats people as individuals
- empathetic
- integrity
- honesty

- trustworthy
 - respectful
 - reliable
 - confidence
 - patience
 - self-awareness
-

Learning outcome

The learner will:

- 2 understand the principles and process of mentoring in the workplace

Assessment criteria

The learner can:

- 2.1 Explain the purpose of mentoring
 - 2.2 Explain theoretical models for mentoring
 - 2.3 Explain the roles of the people involved in the mentoring process
 - 2.4 Describe the benefits and challenges of mentoring
 - 2.5 Explain the skills and qualities required for mentoring
-

Range

(AC2.1) **Purpose:**

- develop own skills
- transfer knowledge and experience
- offer information and guidance
- signpost to relevant resources
- assist someone new in post
- support colleague through a period of change
- listen to proposed ideas
- answer questions
- challenge or question where appropriate
- offer solutions

(AC2.2) **Theoretical models:**

- 1-2-1 mentoring
 - Individual support
 - Personal relationship
 - resource based
 - lists available mentors
 - not individually matched
 - mentee initiates
 - mentee selects mentor
 - mentee seeks appointments
 - group mentoring
 - mentor work with 4-6 mentees at a time
-

- meeting 1-2 times per month
- combines senior/peer mentoring
- share knowledge and skills
- training based
 - directly linked to training programme
 - to develop a specific skill
 - focusses on a single subject
 - limited in scope
 - does not develop broader skills set
- executive mentoring
 - top-down model
 - develops mentoring culture
 - cultivates skills/knowledge throughout organisation
 - effective succession planning tool

(AC2.3) **Roles:**

- mentor
- mentee
- line manager
- Senior Management Team (SMT)

Process:

- identify the need for a mentor
- assign a specialist mentor
- agree the purpose of mentoring activities
- explore options
 - referrals
 - signposting
 - self-directed activities
 - training
- develop a plan to achieve agreed objectives
- support individual to achieve objectives (find solutions to barriers)
- monitor progress/achievement of objectives
- maintain records

(AC2.4) **Benefits:**

- to mentor:
 - develop leadership and management skills
 - learn to adapt own mentoring style
 - enhance own specialist knowledge
 - personal satisfaction in helping someone else improve
 - increase self-esteem
 - recognition of specialist skills
 - increase confidence
 - increase self-awareness
- to mentee:
 - increase self-confidence
 - increase self-awareness
 - opportunity to identify and improve weaknesses
 - deeper understanding of organisation
 - improves employability
 - increase own profile within organisation

- increase skills and knowledge
- increase cross working relationships
- improve own performance
- opportunity to work with experienced specialist(s)
- to organisation eg line manager, Senior Management Team (SMT):
 - improve performance, productivity
 - improve motivation of workforce
 - up skilled work force
 - increase potential to achieve aims and objectives
 - closes identified skills gaps
 - improve skills retention
 - improve inclusive work culture

Challenges:

- apathy/lack of aspiration
- hierarchical status
- lack of trust and/or respect
- personal beliefs
- breakdown of relationship
- over dependence
- inexperienced mentor
- attitudes and perceptions
- expectations (high or low)
- time constraints
- complex needs:
 - health issues
 - behavioural issues
 - language/learning barriers
 - personal circumstances/responsibilities

(AC2.5) **Skills:**

- maintains occupational knowledge of policy, procedure, knowledge of products, services, solutions, use of digital technology
- able to make informed judgements
- solution focused
- communication skills
 - verbal
 - non-verbal
 - formal
 - informal
- active listening
- questioning techniques
 - probing
 - open
 - closed
 - leading
 - exploratory
 - funnel
- summarising
 - feedback
 - paraphrasing

- contextualising
 - anecdotal
 - story telling
 - scenarios
 - lessons learnt
- reflective practice
- ability to deal with conflict
- understanding of professional boundaries
 - maintain confidentiality
 - non-hierarchical relationship
- able to tailor techniques to meet individual needs
- planning and time management
- challenges negative beliefs and perceptions.

Qualities:

- interpersonal skills
 - ability to build rapport
 - observes and responds to non-verbal signals
- resilience
- flexibility/adaptability
- motivational
 - encouraging
 - inspiring
 - builds on strengths
- non-threatening
- treats people as individuals
- empathetic
- integrity
- honesty
- trustworthy
- respectful
- reliable
- confidence
- patience
- self-awareness.

Appendix 1 Mapping to Customer Service Specialists (Level 3) Apprenticeship Standard

An apprenticeship is typically made up of three components:

- On Programme component: the learning, training and formative assessment delivered by the provider for the duration of the apprenticeship
- A Gateway component: conducted partway through the programme and used to confirm that an apprentice is ready to take their End Point Assessment.
- End Point Assessment: an assessment of the learning delivered at the end of the programme.

Using this guide

This mapping document lays out how you can deliver the City & Guilds Level 3 Diploma for Customer Service Specialists (2794-03) to closely meet the Customer Service Specialist (Level 3) Apprenticeship Standard.

The document breaks down the essential knowledge, skills and behaviours within the Customer Service Specialist (Level 3) Apprenticeship Standard and highlights how each of these can be achieved through the learning outcomes of specific City & Guilds units.

The document also offers further advice where necessary on how to best expand learning outcomes to fully cover the Apprenticeship Standard.

This mapping document only relates to the On Programme learning of the apprenticeship. All learners will need to successfully complete a separate and Independent End-point Assessment in order to achieve the Customer Service Specialist (Level 3) Apprenticeship. Please note, that it is the centre's responsibility to ensure that the Standards are met.

This document shows where the specified units in the City & Guilds Level 3 Diploma for Customer Service Specialists map to the Customer Service Specialist (Level 3) Apprenticeship. This document provides advice and guidance on how you can make this City & Guilds qualification align with the On Programme component of the apprenticeship standard.

The mapping below highlights the best fit units with additional advice to ensure full completion. This means that you will be delivering to apprenticeship standard if you use the units below and ensure the additional advice is followed.

You can choose whether to complete the units chosen below or design your own programmes that fit with the apprenticeship standard. If you choose to use different units from the City & Guilds Level 3 Diploma for Customer Service Specialists suite, then you will need to ensure they map to the apprenticeship standard.

How does the apprenticeship standard define a customer service specialist?

A customer service specialist is an advocate of Customer Service who acts as a referral point for dealing with more complex or technical customer requests, complaints, and queries.

The standard covers the following:

- Business Knowledge and Understanding
- Customer Journey knowledge
- Knowing your customers and their needs/Customer Insight
- Customer service culture and environment awareness
- Business focused service delivery
- Providing a positive customer experience
- Working with your customers / customer insights
- Customer service performance
- Service improvement
- Develop self
- Ownership / Responsibility
- Team working
- Equality
- Presentation

City & Guilds Level 3 Diploma for Customer Service Specialists

This qualification maps to the On Programme learning of the Customer Service Specialist (Level 3) Apprenticeship using the following mapping guidance. The City & Guilds qualification is ideal for individuals looking to be a customer service specialist - a 'professional' for direct customer support within all sectors and organisation types.

In order to closely map to the standard all the following units within the Level 3 Diploma for Customer Service need to be completed:

City & Guilds unit No.	Unit title	Credit value	Unit Level
301	Developing self	25	3

302	Customer service legislation, regulation, policies and procedures	20	3
303	Effective team working	25	3
304	Brand, image and reputation	25	3
305	Business knowledge and understanding in a customer service environment	40	3
306	Specialist customer service knowledge and skills	20	3
307	Handling and resolving complex customer service issues	20	3
308	Improvement to customer service delivery	35	3

Please note 1: Throughout this document there are additional comments in italics. These are suggestions of how the C&G learning outcomes should be used and expanded to fully cover the appropriate apprenticeship standard.

Although not part of the mapping the candidate will require to complete one optional unit from the following to complete the Level 3 Diploma for Customer Service Specialists:

- Unit 309 Team Leading
- Unit 310 Retail operations
- Unit 311 Planning and implementation of a sales campaign(s)
- Unit 312 Marketing Management
- Unit 313 Use of Social Media in own organisation
- Unit 314 Project Management
- Unit 315 Coaching and mentoring

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
Business Knowledge and Understanding	<p>Understand your organisation's current business strategy in relation to customers and make recommendation for its future</p> <p>Pass criteria:</p> <p>Evidence that they understand the impact of the organisation's mission statement and business strategy on customer service delivery and make recommendations for future improvements.</p>	<p>Unit 305 - Business knowledge and understanding in a customer service environment</p> <p>LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery</p> <p>Unit 308 - Improvement to customer service delivery</p> <p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p> <p>LO3 - Recommend a service related improvement(s)</p>
	<p>Understand the impact your service provision has on the wider organisation and the value it adds</p> <p>Pass criteria:</p> <p>Ability to describe their role in meeting their organisation's customer service standards and its impact upon other departments.</p>	<p>Unit 305 - Business knowledge and understanding in a customer service environment</p> <p>LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery</p> <p>LO2 - Understand the impact own service provision has on the wider organisation and the value it adds.</p>
	<p>Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation</p>	<p>Unit 303 - Effective team working</p> <p>LO2 - Understand the benefits of working collaboratively with colleagues within own organisation</p> <p>LO3 - work with colleagues at various levels in own organisation to achieve results</p> <p>Unit 308 - Improvement to customer service delivery</p> <p>LO1 - Interpret customer feedback gathered using a variety of methods.</p> <p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Pass criteria:</p> <p>Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role.</p> <p>Demonstrated how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.</p>	<p>procedures</p> <p>LO3 - Recommend a service related improvement(s)</p> <p>Note: the learner needs to understand how their recommendations for change impact on the organisation</p>
	<p>Understand the principles and benefits of being able to think about the future when taking action or making service related decisions</p> <p>Pass criteria:</p> <p>Ability to recommend improvement to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their own role</p>	<p>Unit 308 - Improvement to customer service delivery</p> <p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p> <p>LO3 - Recommend a service related improvement(s)</p> <p>Note: the learner needs to show they understand the benefit this change could have on the organisation and their own role</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Understand a range of leadership styles and apply them successfully in a customer service environment</p> <p>Pass criteria:</p> <p>Evidence of how they identify the different types of leadership styles that work best in their customer environment.</p>	<p>Unit 303 - Team working and leadership styles LO1 - Understand a range of leadership styles</p>
<p>Customer Journey knowledge</p>	<p>Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience</p> <p>Pass criteria:</p> <p>Demonstrates an understanding of customer journeys within their organisation and how these are managed to ensure successful outcomes</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers. Unit 307 - Handling and resolving customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
	<p>Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention</p> <p>Pass criteria:</p> <p>Understanding of why customer issues and</p>	<p>Unit 307 - Handling and resolving customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>complex situations sometimes need referral or escalation for specialist attention within their organisation.</p> <p>Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.</p>	
	<p>Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation</p> <p>Pass criteria:</p> <p>An understanding of the underpinning business processes that support them on bringing about the best outcome for customers and their organisation.</p>	<p>Unit 305 - Business knowledge and understanding in a customer service environment LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery LO2 - Understand the impact own service provision has on the wider organisation and the value it adds Unit 307 - Handling and resolving customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy Unit 308 - Improvement to customer service delivery LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p>
	<p>Understand commercial factors and authority limits for delivering the required customer experience</p> <p>Pass criteria:</p>	<p>Unit 302 - Customer service legislation, regulation, policies and procedures LO1 - Understand the influence and impact of legislation, regulation and organisational factors on own customer service delivery. Unit 304 - Brand, image and reputation LO2 - Behave in a way that represents own organisation's brand, values and beliefs</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Ability to adhere to their organisation's service level agreement and demonstrates an awareness of the limit of their authority when providing customer service.</p>	<p>Unit 307 - Handling and resolving customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
<p>Knowing your customers and their needs/ Customer Insight</p>	<p>Know your internal and external customers and how their behaviour may require different approaches from you</p> <p>Pass criteria:</p> <p>Evidences knowledge of how their internal and external customers' expectations can differ and how they would adapt their approach to meet those expectations.</p>	<p>Unit 303 - Effective team working LO2 - Understand the benefits of working collaboratively with colleagues within own organisation Unit 306 - Specialist customer service knowledge and skills LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers LO2 - Use a range of communication channels to support a positive customer outcome(s) Unit 307 - Handling and resolving customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
	<p>How to analyse, use and present a range of information to provide customer insight</p> <p>Pass criteria:</p> <p>Demonstrates how they analyse, use and present a range of information in order to provide customer insight.</p>	<p>Unit 308 - Improvement to customer service delivery LO1 - Interpret customer feedback gathered using a variety of methods. LO3 - Recommend a service related improvement(s)</p>
	<p>Understand what drives loyalty, retention and</p>	<p>Unit 304 - Brand, image and reputation</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>satisfaction and how they impact on your organisation</p> <p>Pass criteria:</p> <p>Demonstrates factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation.</p>	<p>LO1 - Understand the importance of own contribution to organisation's brand and links to customer loyalty, retention and satisfaction</p> <p>Unit 305 - Business knowledge and understanding in a customer service environment</p> <p>LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery</p>
	<p>Understand different customer types and the role of emotions in bringing about a successful outcome</p> <p>Pass criteria:</p> <p>An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.</p> <p>An ability to react appropriately to customer emotions and bring about a successful outcome for different customer types</p>	<p>Unit 306 - Specialist customer service knowledge and skills</p> <p>LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers.</p>
	<p>Understand how customer expectations can differ between cultures, ages and social profiles</p> <p>Pass criteria:</p>	<p>Unit 302 - Customer service legislation, regulation, policies and procedures</p> <p>LO1 - Understand the influence and impact of legislation, regulation and organisational factors on own customer service delivery.</p> <p>Unit 306 - Specialist customer service knowledge and skills</p> <p>LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers.</p>

Knowledge	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
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Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
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Customer service culture and environment awareness

Keep current, knowledge and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers

Pass criteria:

Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.

Unit 301 - Develop self
LO1 - Understand the process required in improving personal and professional development in terms of own industry.
LO2 - Prepare a personal development plan, based on self-assessment.
Unit 302 - Customer service legislation, regulation, policies and procedures
LO1 - Understand the influence and impact of legislation, regulation and organisational factors on own customer service delivery.

Understand your business environment and culture and the position of customer service within it

Pass criteria:

Ability to discuss the internal and external factors influencing their business environment and culture.

Evidences knowledge of

Unit 302 - Customer service legislation, regulation, policies and procedures
LO2 - Understand the influence and impact of legislation, regulation and organisational factors on own customer service delivery.
Unit 305 - Business knowledge and understanding in a customer service environment
LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery
Unit 305 - Business knowledge and understanding in a customer service environment

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>the departmental roles/functions within their organisational structure and their influence in customer service delivery.</p>	<p>LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery LO2 - Understand the impact own service provision has on the wider organisation and the value it adds LO3 - Understand own organisational structure and the role each department needs to play in delivering customer service</p>
	<p>Understand your organisation structure and what role each department needs to play in delivering Customer Service and what the consequences are should things go wrong</p> <p>Pass criteria:</p> <p>Evidences knowledge of the departmental roles/functions within their organisational structure and their influence in customer service delivery</p> <p>Ability to identify potential causes of service failure and the consequences of these.</p>	<p>Unit 305 - Business knowledge and understanding in a customer service environment LO1 - Understand own organisation's current business strategy, environment and culture and their impact on customer service delivery LO2 - Understand the impact own service provision has on the wider organisation and the value it adds LO3 - Understand own organisational structure and the role each department needs to play in delivering customer service</p>
	<p>Understand how to find and use industry best practice to enhance own knowledge</p> <p>Pass criteria:</p> <p>Evidences knowledge of where different sources of information on industry best practice can</p>	<p>Unit 301 - Develop self LO1 - Understand the process required in improving personal and professional development in terms of own industry. LO2 - Prepare a personal development plan, based on self-assessment. Unit 308 - Improvement to customer service delivery LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>be found and used to improve personal and professional development.</p> <p>Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.</p>	
Business focused service delivery	<p>Demonstrate a continuous improvement and future focussed approach to customer service delivery including decision making and providing recommendations or advice</p> <p>Pass criteria:</p> <p>Evidences when they made decisions and recommendations to improve their own customer service delivery.</p>	<p>Unit 308 - Improvement to customer service delivery</p> <p>LO1 - Interpret customer feedback gathered using a variety of methods.</p> <p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p> <p>LO3 - Recommend a service related improvement(s)</p> <p>Note: the learner must make recommendations to improve their own customer service delivery.</p>
	<p>Resolve complex issues by being able to choose from and successfully apply a wide range of approaches</p> <p>Pass criteria:</p> <p>Demonstrates resolution of a range of complex customer service issues,</p>	<p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p> <p>LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	explaining the approach used and why, demonstrating accountability throughout.	
	<p>Find solutions that meet your organisation's needs as well as the customer requirements</p> <p>Pass criteria:</p> <p>An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.</p>	<p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p> <p>LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
Providing a positive customer experience	<p>Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes</p> <p>Pass criteria:</p> <p>Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.</p>	<p>Unit 306 - Specialist customer service knowledge and skills</p> <p>LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers.</p> <p>LO2 - Use a range of communication channels to support a positive customer outcome(s)</p> <p>LO3 - Use advanced communication skills to reach mutually beneficial outcomes</p>
	<p>Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service or strategy</p> <p>Pass criteria:</p>	<p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p> <p>LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p> <p>Unit 308 - Improvement to customer service delivery</p> <p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p> <p>LO3 - Recommend a service related improvement(s)</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.	
	<p>Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps</p> <p>Pass criteria: An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements.</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO3 - Use advanced communication skills to reach mutually beneficial outcomes Unit 307 - Handling and resolving complex customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
	<p>Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction</p> <p>Pass criteria: Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others.</p> <p>Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.</p>	<p>Unit 303 - Effective team working LO2 - Understand the benefits of working collaboratively with colleagues within own organisation LO3 - Work with colleagues at various levels in own organisation to achieve results Unit 308 - Improvement to customer service delivery LO1 Interpret customer feedback gathered using a variety of methods. LO3 - Recommend a service level improvement(s)</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Demonstrate a cost-conscious mind-set when meeting customer and the business needs</p> <p>Pass criteria:</p> <p>Demonstrates when they have balanced the meeting of their customer and their organisation's needs while showing they have considered cost implications.</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO3 - Use advanced communication skills to reach mutually beneficial outcomes Unit 307 - Handling and resolving complex customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p> <p>Note: the learner must be able to show they have considered cost implications</p>
	<p>Identify where highs and lows of the customer journey produce a range of emotions in the customer</p> <p>Pass criteria:</p> <p>Recognises when customer emotions have been affected by the level of service offered.</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers.</p>
	<p>Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format</p> <p>Pass criteria:</p> <p>Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO2 - Use a range of communication channels to support a positive customer outcome(s)</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
Working with your customers / customer insight	<p>Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implication and facts and act upon it</p> <p>Pass criteria:</p> <p>Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented</p> <p>Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements.</p>	<p>Unit 308 - Improvement to customer service delivery LO1 - Interpret customer feedback gathered using a variety of methods LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures LO3 - Recommend a service related improvement(s)</p>
	<p>Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service</p> <p>Pass criteria:</p> <p>Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be</p>	<p>Unit 302 - Customer service legislation, regulation, policies and procedures LO2 - Support equality, diversity and inclusion in own delivery of customer service. Unit 306 - Specialist customer service knowledge and skills LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers. Unit 308 - Improvement to customer service delivery LO1 - Interpret customer feedback gathered using a variety of methods</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>analysed, used and presented</p> <p>Ability to gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations.</p>	
Customer service performance	<p>Maintain a positive relationship even when you are unable to deliver the customer's expected outcome</p> <p>Pass criteria:</p> <p>Evidences when they have maintained a positive relationship even when they are unable to deliver the customer's expected outcome.</p> <p>Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.</p>	<p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p> <p>LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
	<p>When managing referrals or escalations take into account historical interactions and challenges to determine next steps</p> <p>Pass criteria:</p> <p>Demonstrates when and how historical</p>	<p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy</p>

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.	
Service improvement	<p>Analyse the end to end service experience, seeking input from others where required supporting development of solutions</p> <p>Pass criteria:</p> <p>Evidence of how they demonstrate the importance of effective communication among departments in providing good customer service.</p>	<p>Unit 303 - Effective team working LO2 - Understand the benefits of working collaboratively with colleagues within own organisation LO3 - Work with colleagues at various levels in own organisation to achieve results</p> <p>Unit 305 - Business knowledge and understanding in a customer service environment LO3 - Understand own organisational structure and the role each department needs to play in delivering customer service</p> <p>Unit 308 - Improvement to customer service delivery LO1 - Interpret customer feedback gathered using a variety of methods. LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures LO3 - Recommend a service related improvement(s)</p>
	<p>Make recommendations based on your findings to enable improvement</p> <p>Pass criteria:</p> <p>Evidence to show how they use the qualitative and quantitative customer experience data that their organisation gathers.</p> <p>Evidences the way in which they analyse this data to recommend continuous improvement, showing there is input from others where required.</p>	<p>Unit 308 - Improvement to customer service delivery LO1 - Interpret customer feedback gathered using a variety of methods. LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures LO3 - Recommend a service related improvement(s)</p>
	Make recommendations and implement where possible, changes in line	Unit 308 - Improvement to customer service delivery

Skills	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>with new and relevant legislation, regulations and industry best practice</p> <p>Pass criteria:</p> <p>Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change.</p>	<p>LO2 - Understand the need for continuous service related improvement(s) including organisational implementation procedures</p> <p>LO3 - Recommend a service related improvement(s)</p>

Behaviours	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
Developing self	<p>Proactively keep your service, industry and best practice knowledge and skills up-to-date</p> <p>Pass criteria:</p> <p>Evidences knowledge of where different sources of information on industry best practice can be found and used to improve personal and professional development.</p> <p>Provides evidence to demonstrate how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.</p>	<p>Unit 301 - Develop self</p> <p>LO1 - Understand the process required in improving personal and professional development in terms of own industry.</p> <p>LO2 - Prepare a personal development plan, based on self-assessment.</p>
	<p>Consider personal goals related to service and take action towards achieving them</p> <p>Pass criteria:</p> <p>Provides evidence to demonstrate</p>	<p>Unit 301 - Develop self</p> <p>LO2 - Prepare a personal development plan, based on self-assessment.</p>

Behaviours	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>how they have achieved learning and development goals, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice.</p>	
<p>Ownership / Responsibility</p>	<p>Personally commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation</p> <p>Pass criteria:</p> <p>Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO3 - Use advanced communication skills to reach mutually beneficial outcomes Unit 307 - Handling and resolving complex customer service issues LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
	<p>Exercises proactivity and creativity when identifying solutions to customer and organisational issues</p> <p>Pass criteria:</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO3 - Use advanced communication skills to reach mutually beneficial outcomes. Unit 307 - Handling and resolving complex customer service issues LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>

Behaviours	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	Shows proactivity and creativity when identifying solutions to customer and organisational issues.	Note: The learner must cover not only customer issues but organisational ones also
	<p>Make realistic promises and deliver on them</p> <p>Pass criteria:</p> <p>Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation.</p>	<p>Unit 306 - Specialist customer service knowledge and skills LO3 - Use advanced communication skills to reach mutually beneficial outcomes.</p> <p>Unit 307 - Handling and resolving complex customer service issues</p> <p>LO1 - Deal with escalation and/or referrals in line with own organisation's policy LO2 - Build and maintain a positive relationship with customers when handling complex and challenging issues</p>
Team working	<p>Work effectively and collaboratively with colleagues at all levels to achieve results</p> <p>Pass criteria:</p> <p>Demonstrates achievement of results through effective team work and collaboration with colleagues at all levels.</p>	<p>Unit 303 - Team working and leadership styles LO2 Recognise colleagues as internal customers and the benefits of sharing knowledge and experience LO3 - Work with colleagues at various levels in own Organisation to achieve results.</p>
	Recognise colleagues as internal customers	<p>Unit 302 - Customer service legislation, regulation, policies and procedures LO2 - Support equality, diversity and inclusion in own</p>

Behaviours	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Pass criteria:</p> <p>Shows adaptability of own skills when working with internal customers.</p>	<p>delivery of customer service.</p> <p>Unit 303 - Team working and leadership styles LO2 Recognise colleagues as internal customers and the Benefits of sharing knowledge and experience</p> <p>Note: the learner must show adaptability of own skills when working with internal customers</p>
	<p>Share knowledge and experience with others to support colleague development</p> <p>Pass criteria:</p> <p>Demonstrate sharing own knowledge and experience with others, to support colleague development.</p>	<p>Unit 303 - Team working and leadership styles LO2 - Recognise colleagues as internal customers and the benefits of sharing knowledge and experience LO3 - Work with colleagues at various levels in own Organisation to achieve results.</p>
Equality	<p>Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer</p> <p>Pass criteria:</p> <p>Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.</p>	<p>Unit 302 - Customer service legislation, regulation, policies and procedures LO2 - Support equality, diversity and inclusion in own delivery of customer service Unit 306 - Specialist customer service knowledge and skills LO1 - Understand how to adapt to the emotions, behaviours and expectations of own customers. LO2 - Use a range of communication channels to support a positive customer outcome(s)</p> <p>Note: The learner will need to tailor own service to each customer</p>

Behaviours	Apprenticeship What is required	City & Guilds Qualification units and learning outcomes Level 3 Diploma for Customer Service Specialists (2794-03)
	<p>Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment</p> <p>Pass Criteria:</p> <p>Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.</p>	<p>Unit 302 - Customer service legislation, regulation, policies and procedures LO2 - Support equality, diversity and inclusion in own delivery of customer service</p> <p>Unit 306 - Specialist customer service knowledge and skills LO2 - Use a range of communication channels to support a positive customer outcome(s)</p>
Presentation	<p>Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction</p> <p>Pass criteria: Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.</p>	<p>Unit 304 - Brand, image and reputation LO1 - Understand the importance of own contribution to organisation's brand and links to customer loyalty, retention and satisfaction LO2 - Behave in a way that represents own organisation's brand, values and beliefs</p>
	<p>Ensure your personal presentation, in all forms of communication, reflects positively on your</p>	<p>Unit 304 - Brand, image and reputation LO1 - Understand the importance of own contribution to organisation's brand and links to customer loyalty, retention and satisfaction LO2 - Behave in a way that represents own organisation's brand, values and beliefs</p>

Behaviours

Apprenticeship
What is
required

City & Guilds Qualification units and learning
outcomes
Level 3 Diploma for Customer Service Specialists
(2794-03)

organisation's
brand

Pass criteria:

Evidence to show
how their personal
presentation made
a positive impact
on their
organisation's
brand.

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the Centres and Training Providers homepage on www.cityandguilds.com.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues.

Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

Centre Guide – Delivering International Qualifications contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification.

Specifically, the document includes sections on:

- The centre and qualification approval process and forms

- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Appendix 3 Useful contacts

UK learners

General qualification information

E: learnersupport@cityandguilds.com

International learners

General qualification information

E: intcg@cityandguilds.com

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

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City & Guilds

1 Giltspur Street

London EC1A 9DD

www.cityandguilds.com
