

Entry/Level 1 Awards/Certificates for Introduction to Customer Service (4411)

Qualification handbook for centres

Qualification accreditation numbers

4411-30 Entry Level Award for Introduction to
Customer Service (Entry 3) - 501/1840/7

4411-33 Entry Level Certificate for Introduction to
Customer Service (Entry 3) - 501/1838/9

4411-01 Level 1 Award for Introduction to Customer
Service - 501/1839/0

4411-11 Level 1 Certificate for Introduction to
Customer Service - 501/1837/7

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Entry/Level 1 Awards/Certificates for Introduction to Customer Service (4411)



Qualification accreditation numbers

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Qualification title	Number	QAN
Entry Level Award for Introduction to Customer Service (Entry 3)	4411-30	501/1840/7
Entry Level Certificate for Introduction to Customer Service (Entry 3)	4411-33	501/1838/9
Level 1 Award for Introduction to Customer Service	4411-01	501/1839/0
Level 1 Certificate for Introduction to Customer Service	4411-11	501/1837/7

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1.1 October 2017	Added GLH and TQT details	Introduction to the qualifications
	Removed QCF	Appendix 1
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	City & Guilds address updated	Back page
1.4 July 2023	Last registration and certification dates removed	Introduction to the qualifications Page 5
	Link to NDAQ removed	Units Page 15

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1 Introduction to the qualifications

This document contains the information that centres need to offer the following qualifications:

Qualification title and level	GLH	TQT	City & Guilds qualification number	Qualification accreditation number
Entry Level Award for Introduction to Customer Service (Entry 3)	51	60	4411-30	501/1840/7
Entry Level Certificate for Introduction to Customer Service (Entry 3)	109	130	4411-33	501/1838/9
Level 1 Award for Introduction to Customer Service	57	70	4411-01	501/1839/0
Level 1 Certificate for Introduction to Customer Service	109	130	4411-11	501/1837/7

1.1 Qualification structure

To achieve the **Entry 3 Award for Introduction to Customer Service (4411-30)** the learner must achieve a **minimum of 6 credits** from the list of units provided, using the following rules of combination:

- A minimum of **4 credits must** be from entry 3 units 001-010
- **2 credits must** be from the entry 3 mandatory unit 002
- A further **4 credits** can be from any of the following allowing for the excluded combinations of units (see table below)
 - Entry 3 units 001-010
 - Level 1 units 101-110

To achieve the **Entry 3 Certificate for Introduction to Customer Service (4411-33)** the learner must achieve a **minimum of 13 credits** from the list of units provided, using the following rules of combination:

- A minimum of **7 credits must** be from entry 3 units 001-010
- **4 credits must** be from the entry 3 mandatory units 002, 009
- A further **9 credits** can be from any of the following allowing for the excluded combinations of units (see table below)
 - Entry 3 units 001-010
 - Level 1 units 101-110

To achieve the **Level 1 Award for Introduction to Customer Service (4411-01)** the learner must achieve a **minimum of 7 credits** from the list of units provided, using the following rules of combination:

- A minimum of **5 credits must** be from level 1 units 101-110
- **3 credits must** be from the level 1 mandatory unit 102
- A further **4 credits (minimum)** can be from any of the following allowing for the excluded combinations of units (see table below)
 - Entry 3 units 001-010
 - Level 1 units 101-110

To achieve the **Level 1 Certificate for Introduction to Customer Service (4411-11)** the learner must achieve a **minimum of 13 credits** from the list of units provided, using the following rules of combination:

- A minimum of **7 credits must** be from level 1 units 101-110
- **5 credits must** be from the level 1 mandatory units 102, 105
- A further **8 credits (minimum)** can be from any of the following allowing for the excluded combinations of units (see table below)
 - Entry 3 units 001-010
 - Level 1 units 101-110

Entry Level 3 Units

City & Guilds unit number	Unit title	Unit accreditation number	Mandatory/ optional for full qualification	Credit value	Excluded combination of units (if any)
Unit 001	The importance of appearance and behaviour in customer service	A/601/6047	Optional	2	Cannot be taken with unit 101
Unit 002	Legislation, regulation and procedures to follow in customer service	J/601/6052	Mandatory (for 4411-30,33) Optional (For 4411-01,11)	2	Cannot be taken with unit 102
Unit 003	Understand how to deal with queries and requests	R/601/6054	Optional	3	Cannot be taken with unit 103
Unit 004	Communicate customers' problems with others	D/601/6056	Optional	2	Cannot be taken with unit 104
Unit 005	The customer service job role	K/601/6058	Optional	2	Cannot be taken with unit 105
Unit 006	Handling telephone calls from customers	M/601/6059	Optional	2	Cannot be taken with unit 106
Unit 007	Communicate effectively with customers	M/601/6062	Optional	2	Cannot be taken with unit 107
Unit 008	Effective relationships with customers and colleagues	A/601/6064	Optional	2	Cannot be taken with unit 108
Unit 009	Introduction to customer service	F/601/6065	Mandatory (for 4411-33) Optional (for 4411-01,11,30)	2	Cannot be taken with unit 109
Unit 010	Working in a customer focused way	L/601/6067	Optional	2	Cannot be taken with unit 110

Level 1 Units

City & Guilds unit number	Unit title	Unit accreditation number	Mandatory/ optional for full qualification	Credit value	Excluded combination of units (if any)
Unit 101	Create a good impression to customers	R/601/6068	Optional	2	Cannot be taken with unit 001
Unit 102	Apply legislation, regulation and organisational procedures for customer service	R/601/6071	Mandatory (for 4411-01,11) Optional (For 4411-30,33)	3	Cannot be taken with unit 002
Unit 103	Deal with queries and requests	H/601/6074	Optional	3	Cannot be taken with unit 003
Unit 104	Record and communicate customer problems	K/601/6075	Optional	2	Cannot be taken with unit 004
Unit 105	Working in customer service	M/601/6076	Mandatory (for 4411-11) Optional (for 4411-01,30, 33)	2	Cannot be taken with unit 005
Unit 106	Answer telephone calls from customers	T/601/6077	Optional	2	Cannot be taken with unit 006
Unit 107	Positive communication with customers	A/601/6078	Optional	2	Cannot be taken with unit 007
Unit 108	Contribute to effective customer service	F/601/6079	Optional	2	Cannot be taken with unit 008
Unit 109	The customer service experience	T/601/6080	Optional	2	Cannot be taken with unit 009
Unit 110	Work in a customer-friendly way	A/601/6081	Optional	2	Cannot be taken with unit 010

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Entry Level Award for Introduction to Customer Service (Entry 3)	51	60
Entry Level Certificate for Introduction to Customer Service (Entry 3)	109	130
Level 1 Award for Introduction to Customer Service	57	70
Level 1 Certificate for Introduction to Customer Service	109	130

1.2 Opportunities for progression

On completion of these qualifications candidates may progress into employment or to the following City & Guilds qualifications:

- Level 2 Certificate in Customer Service (4417)
- Level 2 NVQ in Customer Service (4430)
- Level 2 Apprenticeship in Customer Service (9010)

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for these qualifications:

Description	How to access
Promotional materials – Information Sheet	www.cityandguilds.com
Fast track approval forms/generic fast track approval form	www.cityandguilds.com

2 Centre requirements

This section outlines the approval processes for Centres to offer these qualifications and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the Level 1 NVQ Certificate in Customer Service (4430-01) qualification may apply for approval for the new Entry/Level 1 Awards/Certificates for Introduction to Customer Service using the **fast track approval form**, available from the City & Guilds website.

Centres may apply to offer the new qualifications using the fast track form

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

Fast track approval is available for 12 months from the launch of the qualification. After this time, the qualification is subject to the **standard** Qualification Approval Process. It is the centre's responsibility to check that fast track approval is still current at the time of application.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1 Resource requirements

Human resources

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

- be technically competent in the areas for which they are delivering training. This knowledge must be above the 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 must never internally verify their own assessments.

Assessors and internal verifiers

While the Assessor/Verifier (A/V) units are valued as qualifications for centre staff, they are not currently a requirement for the qualifications.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully.

Age restrictions

There are no age limits attached to candidates undertaking the qualifications unless this is a legal requirement of the process or the environment.

3 Course design and delivery

3.1 Recommended delivery strategies

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

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualifications.

City & Guilds recommends that centres address the wider curriculum, where appropriate, when designing and delivering the course. Centres should also consider links to the National Occupational Standards, Key/Core Skills and other related qualifications.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualifications. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

4 Assessment

4.1 Summary of assessment methods

For these qualifications candidates will be required to produce a portfolio of evidence for the specific units they are working towards.

Time constraints

The following time constraints must be applied to the assessment of these qualifications:

- Candidates must be assessed within the period of their registration.

4.2 Evidence requirements

Details of types of evidence required are given in each unit. The assessor will use different methods to assess performance eg observation, witness testimonies, asking questions, professional discussion. Efficient and holistic assessment should be practised wherever possible eg through the use of video, audio-recorded discussions etc.

As part of the assessment for these qualifications candidates can use a realistic working environment or simulation.

Simulation

Simulation is defined by the Institute of Customer Service (ICS) as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

To undertake the assessment of simulated activities the following guidelines must be met:

- a when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say;
- b the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced;
- c the person taking part in the simulation as a customer must be credible for the situation that is being simulated;
- d any resources or equipment that would normally be in real work should be available and in working order for the simulation;
- e candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work;
- f candidates should complete the required tasks taking account of legislation and regulation that would apply in real work;
- g candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality;
- h whilst the primary purpose of the Simulation is for Assessment, feedback must be given in a way that builds confidence.

Realistic Working Environment (RWE)

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

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

- a assessments must be carried out under realistic business pressures, using real customers and within a defined service offer
- b all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
- c candidates must be expected to achieve a volume of work comparable to normal business practices
- d the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards
- e account must be taken of any legislation or regulations in relation to the type of work that is being carried out
- f candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at the relevant level
- g candidates must show that their productivity reflects those found in the work situation being represented

4.3 Recording forms

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

City & Guilds endorses several ePortfolio systems. 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.

N/SVQ Recording forms are available on the City & Guilds website.

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.

5 Units

Availability of units

The units for these qualifications follow.

Structure of units

The units in these qualifications are written in a standard format and comprise the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- evidence guide.

Glossary of terms used in the units

The following key words and terms are used in the units.

Term	Definition
After-sales service	providing support for a service or a product after purchase
benefit	the positive effects for a customer of the features of a product or service, eg time-saving, space-saving, economical
body language	Gestures, facial expressions/eye movements and body postures are all signals that communicate feelings
brand	logos, images, sounds associated with an organisation that a customer instantly recognises
code of practice	a guide for organisations detailing how they should conduct their business
customer	someone in receipt of customer service from a service deliverer.
customer charter	the promise made by the organisation on how it will provide its service to the customer
customer expectations	what customers think should happen and how they think they should be treated when asking for or receiving customer service.
customer feedback	Information from the customer about their views/opinions on the product/service received
customer loyalty	the tendency of a customer to return to the same service deliverer
customer satisfaction	the feeling that a customer gets when they are happy with the customer service that has been provided
customer service	“is the sum total of what an organisation does to meet customer expectations and produce customer satisfaction.” (ICS Glossary Aug 2007).
customer service policy	organisational procedures in terms of what the customer can expect, level of service, how to complain
external customer	A customer from outside of the organisation
feature	different elements of a product or service, eg easy-to-use, compact, speed
goodwill	offering something extra to the customer
Internal customer	a customer from within the organisation
mission statement	a brief statement of the aims and objectives of the organisation.
policy	a document which is a statement/ guideline of working practice in a particular area which may cover legal requirements
procedure	a set way to carry out a task
product	a manufactured item that can be bought and owned
promotion	methods of advertising products, services or offers
service	to provide or carry out certain tasks/actions for a customer
service deliverer	person within an organisation providing service to a customer
service offer	what an organisation states it will offer the customer and what the customer expects from the organisation
terms and conditions	Statement of what is included in an agreement between the customer and the organisation, which may cover legal requirements for products or services.

Unit 001

The importance of appearance and behaviour in customer service

Level: Entry 3
Credit value: 2
NDAQ number: A/601/6047

Unit aim

The aim of this unit is to help the learner to become aware of appropriate behaviour and appearance when dealing with customers.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know the dress requirements in customer service jobs
2. Know how general appearance affects the way customers react
3. Know how to interact with customers

Guided learning hours

It is recommended that **15** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 001 The importance of appearance and behaviour in customer service

Outcome 1 Know the dress requirements in customer service
jobs

Assessment Criteria

The learner can:

1. state the appropriate dress in a particular customer service job
2. state inappropriate dress in a particular customer service job.

Criteria Explained

For **1.1** the candidate must state the appropriate dress for a particular customer service job. This may include, sensible footwear, tidy hair, moderate amounts of makeup, wearing a uniform / name badge if company policy. The assessor could refer to the criteria explained in 2.1 of this unit.

For **1.2** the candidate must state inappropriate dress for a particular customer service job. This may include too much makeup, untidy hair, failure to wear uniform or name badge, dirty or creased clothing, shoes that are not suitable for the work being carried out (eg flip-flops or stilettos).

Unit 001 **The importance of appearance and behaviour in customer service**

Outcome 2 Know how general appearance affects the way customers react

Assessment Criteria

The learner can:

1. identify customer expectations of appearance in a particular customer service job role
2. identify personal appearance that could cause negative customer reaction.

Criteria explained

For **2.1** the candidate must be able to identify **three** features of appearance that would be appropriate to a particular customer service job role, for example:

- Overalls (eg garage staff, decorators, supermarket)
- Special clothing for hygiene purposes (e.g. hats to keep hair tucked in, plastic gloves if working with food)
- Smart suit (worn in offices or banks to show professionalism)
- Trendy clothing (worn in a shop to advertise that shop's latest fashion)
- Clothing that fits a colour scheme to match the organisation's colours. Dress code could also vary to indicate more senior management e.g. a shirt, tie and formal trousers/skirt in McDonalds might signify more responsibility whereas staff at a lower level might wear a colour polo shirt and more robust trousers. In most cases the customer service representative is likely to wear a name badge. They should also understand that smart dress codes are likely to be stricter for employees who are in the 'front-line' such as banks, hotels and so on.

For **2.2** the candidate must explain a minimum of **two** types of appearance that could cause a negative reaction for example somebody with dirty nails, unkempt hair, untidy appearance, too much makeup/perfume and revealing clothing. They should understand that appearance also incorporates attitude so a person who serves a customer with a scowling face could mean that they have no particular interest in the customer.

Unit 001

The importance of appearance and behaviour in customer service

Outcome 3

Know how to interact with customers

Assessment Criteria

The learner can:

1. state the importance of making a good first impression on customers
2. describe how to greet customers politely and positively
3. state how to recognise when a customer wants or needs attention
4. state how to respond when a customer wants or needs attention
5. describe how to focus on customers and avoid distractions when dealing with them
6. state the importance of thanking customers for their business or for information given.

Criteria explained

For **3.1** the candidate must understand that you only get one chance to make a good first impression to customers; whether this is verbally, in writing or face-to-face with internal or external customers. They must consider how their behaviour and attitude influences customer trust, satisfaction, loyalty and whether the customer chooses to do business with your organisation.

For **3.2** the candidate should explain at least **two** positive ways to greet customers such as, making eye contact, smiling in a relaxed way, allowing the customer time to speak, introducing themselves, using open and relaxed hand gestures or leaning forward to show that they are listening. When using the telephone, or greeting customers face-to-face, they may have to follow set organisational procedures.

For **3.3** the candidate must state **two** ways of recognising when a customer wants or needs attention. This could include the customer making eye contact, looking at products, picking up products and putting them down, appearing confused, reading information or looking for an available member of staff.

For **3.4** the candidate must state **two** ways of responding when a customer wants or needs attention eg by acknowledging the customer, responding politely and professionally, acting within a minimum timeframe or apologising for any delays

For **3.5** the candidate must describe how they should put their full attention on their customer by stopping what they are doing, making eye contact and only holding one conversation at a time. If a colleague wants their attention, they should quickly inform them that they will be with them after they have finished serving their customer.

For **3.6** the candidate must state why it is important to thank the customer for their business or for the information given eg so that the communication ends positively and to encourage repeat business.

Unit 001 The importance of appearance and behaviour in customer service

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2 2.2, 2.3 3.1 3.2, 3.3, 3.4, 3.5, 3.6	Written questions, candidate statement, or question and answer sessions to check that the candidate understands the importance of appearance and behaviour in customer service. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded). A project or short presentation by the candidate about different types of dress for different customer service jobs and personal appearance.

Unit 002

Legislation, regulation and procedures to follow in customer service

Level: Entry 3
Credit value: 2
NDAQ number: J/601/6052

Unit aim

The aim of this unit is to help the learner to appreciate the need to act within legislative and regulatory requirements and follow organisational procedures when involved in customer service

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Know organisational procedures for customer service
2. Know how to protect the security of property and information when delivering customer service
3. Know the health and safety rules that relate to a customer service job
4. Know the relevant external rules in a customer service job

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 002 **Legislation, regulation and procedures to follow in customer service**

Outcome 1 Know organisational procedures for customer service

Assessment Criteria

The learner can:

1. state the procedures for a particular customer service job
2. state the limits of responsibility and authority for a particular job in customer service.

Criteria Explained

For **1.1** the candidate must state **two** procedures that relate to one particular customer service job that they have selected. Examples could include:

- Receptionist - procedure on what to say when answering the telephone, what to do when a visitor arrives (ask them to fill in the visitor diary, issue a visitor pass etc)
- Sales Assistant - procedure to follow when issuing refunds (ensuring proof of receipt, taking name, address and signature from customer). Procedure to follow when taking payment (checking cash is genuine, confirming identity of cardholder).

For **1.2** the candidate must state **two** limits that might relate to the particular job from 1.1 for example, needing authority from a manager to issue a refund, replacing a faulty item, and making decisions on customers' special requests.

Unit 002

Legislation, regulation and procedures to follow in customer service

Outcome 2

Know how to protect the security of property and information when delivering customer service

Assessment Criteria

The learner can:

1. state organisational procedures for the security of property when delivering customer service
2. state organisational procedures for the security of information about customers when delivering customer service.

Criteria explained

For **2.1** the candidate must be able to state at least **one** procedure relating to the security of property such as, not leaving the reception unattended, keeping items of stock or valuables locked away, ensuring that the office is locked up and windows are closed when leaving at the end of the day.

For **2.2** the candidate must be able to state at least **one** procedure relating to the security of information such as carrying out a thorough data protection check prior to giving the customer information about their account/case, always making sure that sensitive information is kept out of sight, not sharing passwords, not giving out personal information about the organisation's customers or future business plans, locking their computer when away from their desk etc.

Unit 002

Legislation, regulation and procedures to follow in customer service

Outcome 3

Know the health and safety rules that relate to a customer service job

Assessment Criteria

The learner can:

1. state the health and safety rules that relate to a customer service job
2. state the health and safety risks to customers and colleagues.

Criteria explained

For **3.1** the candidate needs to understand that health and safety rules are there to prevent injury. They should be clearly able to state **two** rules that relate to their chosen customer service job eg cleaning up spills and using a 'wet floor' sign, what to do or who to report to in the event of an accident or fire, always wearing protective clothing provided by the organisation, always washing hands before handling food products, not putting themselves or others in danger.

For **3.2** the candidate should be able to state **two** risks to customers and colleagues eg wet floor, abusive or aggressive customers, dangerous stairs, obstructions on walkways, low beams, poor heating/lighting/ventilation etc.

Unit 002

Legislation, regulation and procedures to follow in customer service

Outcome 4

Know the relevant external rules in a customer service job

Assessment Criteria

The learner can:

1. list legislation and external regulations that impact on a customer service job
2. list things that should not be done in a customer service job because of regulation
3. state your responsibilities for treating customers equally.

Criteria explained

For **4.1** the candidate needs to list **two** pieces of legislation and regulations that might have an impact on their chosen customer service job. Legislation might include Data Protection Act 1998, Financial Services Act, Sales of Goods Act 1979, the Supply of Goods and Services Act 1982, Trade Descriptions Act 1968, the Consumer Protection Act 1987, Health and Safety at Work Act 1974. Regulations might apply to the items that must not be sold to people under a certain age such as knives, harmful substances, tobacco, alcohol or lottery tickets.

For **4.2**, using the information from 4.1 the candidate must list **two** things that should not be done because of the guidelines within the legislation and regulations listed above. The candidate should consider things they should not do such as sharing confidential customer information with unauthorised people (Data Protection Act 1998), describing goods that don't correspond with their description (Sale of Goods Act 1979), providing a service that is not at the proper standard (Supply of Goods and Services Act 1982) or misleading the customer on what the product can do and its quality (Trade Descriptions Act 1968).

For **4.3** the candidate should clearly state their responsibilities when dealing with different types of customers. They should show an understanding that all customers have a right to be acknowledged quickly, responded to promptly, treated courteously and dealt with sensitively no matter what their gender, age, social status, sexuality, race, disability or general physical appearance.

Unit 002 Legislation, regulation and procedures to follow in customer service

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2 2.1, 2.2 3.1, 3.2 4.1, 4.2, 4.3	Written questions, candidate statement, or question and answer sessions to check that the candidate understands legislation, regulation and procedures involved in customer service. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded). The candidate could also do a project or short presentation. Reference could be made to websites containing information on customer service regulations: www.dti.gov.uk , www.instituteofcustomerservice.com , www.hse.gov.uk , www.direct.gov.uk/customer , www.ico.gov.uk

Unit 003

Understand how to deal with queries and requests

Level: Entry 3
Credit value: 3
NDAQ number: R/601/6054

Unit aim

This unit is about helping the learner to understand and know how to react to straightforward customer queries and requests about any products/services that are involved.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Know the services or products of a section or department within an organisation
2. Know the types of question that customers will ask
3. Know how to recognise when a customer has a query or request
4. Know how to clarify details of queries or requests from customers

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 003

Understand how to deal with queries and requests

Outcome 1

Know the services or products of a section or department within an organisation

Assessment Criteria

The learner can:

1. list the services or products a selected section or department offers
2. describe the key features of the services or products a selected section or department offers.

Criteria Explained

For **1.1** the candidate needs to select one organisation and choose one section or department within this organisation and list **one** product or **one** service it provides. The candidate should be aware that some organisations only provide a product or a service and others provide both.

For **1.2** the candidate must state a feature of at least **two** products or services that their section or department offers, eg a product such as a mobile telephone might have the following features, changeable covers, built in mp3 player or built in sat nav. A service such as after sales care on a computer might have the following features, 24 hour free online support for technical issues, 3 year extended warranty and a free telephone helpline.

Unit 003

Understand how to deal with queries and requests

Outcome 2

Know the types of question that customers will ask

Assessment Criteria

The learner can:

1. list the most frequently asked questions about a selected section or department's services or products
2. state the preferred answers to the most frequently asked questions about a selected section or department's services or products.

Criteria explained

For **2.1** the candidate must be able to list at least **two** frequently asked questions about a selected section or department's services or products. Some examples are: In a shop, the questions might relate to colour or sizes available or the expected delivery time/date. In a salon questions might relate to prices for treatments or opening times. In a café or restaurant questions might relate to options for special dietary requirements or how a dish is prepared / what it comes with.

For **2.2** the candidate must be able to give accurate answers to the frequently asked questions in **2.1**. The candidate could use the organisation's 'frequently asked questions' detailing preferred answers if there is one in place.

Unit 003

Understand how to deal with queries and requests

Outcome 3

Know how to recognise when a customer has a query or request

Assessment Criteria

The learner can:

1. listen closely to questions from customers
2. identify when questions from customers require a specific response or action.

Criteria explained

For **3.1** the candidate must be able to demonstrate that they have listened closely to **two** questions from customers by paying full attention, making eye contact, avoiding distractions, taking down notes if required.

For **3.2** the candidate should be able to give **two** examples when questions require a specific response or action eg responding to a complaint, taking the customer to a product in shop, checking product availability, recording customer feedback/comments.

Unit 003

Understand how to deal with queries and requests

Outcome 4

Know how to clarify details of questions or requests from customers

Assessment Criteria

The learner can:

1. state how to check with customers that they have heard their questions correctly
2. state the importance of keeping customers informed about actions on their queries or requests.

Criteria explained

For **4.1** the candidate needs to state **two** ways of checking that they have heard their customer's questions correctly by, eg repeating the question back or asking further questions to ensure that they have fully understood, asking for names/places to be spelt out in full.

For **4.2** the candidate should be able to state that by keeping customers informed and updated on their query or request they are: reassuring the customer they have not been forgotten, making a favourable impression on the customer, making the customer feel respected and valued and more likely to use the organisation again.

Unit 003

Understand how to deal with queries and requests

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2 2.1, 2.2 4.1, 4.2	Written questions, candidate statement, or question and answer sessions to check that the candidate understands how to deal with queries and requests. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).
3.1, 3.2	Observation of performance of the candidate listening to customer questions and responding with the appropriate answer or action.

Unit 004

Communicate customers' problems with others

Level: Entry 3
Credit value: 2
NDAQ number: D/601/6056

Unit aim

The aim of this unit is to help the learner to understand how to communicate effectively with customers and colleagues when there is a customer service problem.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Know how to collect information about a problem from a customer
2. Be able to log information about a customer problem
3. Know how to select information about a customer problem to pass to a colleague
4. Know how to communicate with a customer and a colleague about the problem

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 004

Communicate customers' problems with others

Outcome 1

Know how to collect information about a problem from a customer

Assessment Criteria

The learner can:

1. list the information to seek when asking a customer for details about a problem
2. describe how to check understanding of a problem with a customer.

Criteria Explained

For **1.1** the candidate must list at least **three** different types of information to collect from a customer about a problem eg customer's details, what happened, who was involved, when did it happen, what caused it to happen, what action the customer wants you to take in order to rectify the problem.

For **1.2** the candidate must describe how to check that they have fully understood the customer's problem eg by making notes, asking questions, or repeating back information to confirm understanding.

Unit 004

Communicate customers' problems with others

Outcome 2

Be able to log information about a customer problem

Assessment Criteria

The learner can:

1. take notes about a customer problem
2. check with a customer that notes about the problem are correct.

Criteria explained

For **2.1** the candidate must take clear and accurate notes about at least **one** customer problem, for example, problems about the quality of product or service, delays, incorrect information, attitude of staff or company procedure(s).

For **2.2** the candidate needs to check with the customer that the notes about the problem from 2.1 are correct, by repeating and summarising all of the information.

Unit 004

Communicate customers' problems with others

Outcome 3

Know how to select information about a customer problem to pass to a colleague

Assessment Criteria

The learner can:

1. state the importance of selecting the correct information to identify the customer and the problem
2. identify the details of a customer problem that should be passed on to a colleague.

Criteria explained

For **3.1** the candidate must state why it is important to select the correct information to identify the customer and the problem so that the problem is not made worse and the information is accurate, up-to-date and summarised.

For **3.2** the candidate must identify **three** essential details to be passed to a colleague, eg customer's name, contact details, what happened, when it happened, with whom and any action taken so far.

Unit 004

Communicate customers' problems with others

Outcome 4

Know how to communicate with a customer and a colleague about the problem

Assessment Criteria

The learner can:

1. state the importance of passing full information about the customer problem to a colleague accurately and promptly
2. state the importance of keeping a customer informed about what is being done about the problem.

Criteria explained

For **4.1** the candidate must state why it is important to pass on accurate and detailed information promptly to colleagues about a customer's problem eg so that the problem can be dealt with, delays are minimised and it can be resolved to the customer's satisfaction before the problem gets worse.

For **4.2** the candidate must state the importance of keeping the customer informed about what is being done, for example so that the customer is updated, has information on the progress of their problem, who is dealing with it and what is happening next. Keeping the customer included and updated makes them feel valued and happier.

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2 3.1, 3.2 4.1, 4.2	<p>Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands how to communicate customer problems with others.</p> <p>A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).</p> <p>A project or a role-play activity explaining how to select and communicate information about customers' problems.</p>
2.1, 2.2	<p>Observation of performance demonstrating how the candidate collects information about problems from customers.</p> <p>Work products such as written notes and/or telephone log on previous problems they have dealt with.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face-to-face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>Confidential and/or product evidence can be seen by the assessor; their locations referenced and remain in the workplace.</p>

Level: Entry 3
Credit value: 2
NDAQ number: K/601/6058

Unit aim

The aim of this unit is to help the learner to recognise how customer service jobs, dealing with either external or internal customers, offer opportunities for somebody starting out on a career in customer service.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know what the delivery of good customer service involves
2. Know the requirements of an entry level customer service job
3. Know the outline of a job involving customer service that may be accessible after gaining experience at entry level.

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment:

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 005

The customer service job role

Outcome 1

Know what the delivery of good customer service involves

Assessment Criteria

The learner can:

1. list the information a person needs to do a customer service job
2. list the parts of a job which impact directly on customer service
3. describe the key individual skills needed to do a customer service job
4. describe how the way somebody behaves in a job affects the customer experience.

Criteria Explained

For **1.1** the candidate must list at least **three** pieces of information that they need to do a customer service job eg what to say when greeting a customer, useful contact numbers / web addresses, leaflets, directions, basic information on stock, opening hours, product information, who to refer problems to.

For **1.2** the candidate must list **two** parts of a job which have a direct impact on customer service eg greeting visitors, answering calls, dealing with exchanges or refunds, processing customer information and delivery of the product.

For **1.3** the candidate must describe **two** individual skills needed to do a customer service job such as being able to communicate, identify problems and listen effectively.

For **1.4** the candidate must describe how behaviour can affect the customer experience eg positive examples (including smiling, welcoming greeting, helpful attitude) can leave the customer feeling valued having had a positive experience. Alternatively, a lack of interest, signs of boredom, poor attitude and signs of impatience can all leave the customer feeling undervalued and having no intention to return / use their services again.

Unit 005

Outcome 2

The customer service job role

Know the requirements of an entry level customer service job

Assessment Criteria

The learner can:

1. describe a job that may be a first step in delivering customer service
2. identify who the customers are
3. describe what customers expect from somebody doing that job.

Criteria explained

For **2.1** examples might include, clearing tables in a café, stacking shelves in a shop, delivering newspapers, cleaning an office and students assisting at school/college open evenings. The candidate could use local or national press to identify these positions.

For **2.2** the candidate must be able to identify who the customers are in their organisation. These might include internal customers eg managers, colleagues, staff from other departments or another branch. External customers might include the general public or any customers or companies outside your organisation.

For **2.3** the candidate should describe at least **three** expectations that a customer might have of the customer service representative in an entry level job such as, warm welcome, friendly, smiling greeting, that they will be helpful, positive body language, neat, tidy and appropriate dress. The candidate should use their own positive experiences as a customer.

Unit 005

The customer service job role

Outcome 3

Know the outline of a job involving customer service that may be accessible after gaining experience at entry level

Assessment Criteria

The learner can:

1. describe a job that may follow from gaining experience in a first step customer service job
2. identify who the customers are
3. describe what customers expect from somebody doing that job.

Criteria explained

For **3.1** the candidate must be able to describe a job that they could do following an entry level job as identified in 2.1, eg trainee sales assistant, salon assistant, glass collector.

For **3.2** the candidate must be able to identify who the customers are for the job identified in 3.1. (This should show an expansion of job responsibility). These might include internal customers eg managers, colleagues, staff from other departments or another branch. External customers might include the general public or any customers or companies outside your organisation

For **3.3** the candidate should describe at least **three** expectations of a person doing a job after gaining experience at entry level. These expectations might include, the ability to work out change correctly, reasonable knowledge on most of the products/services offered, the ability to estimate realistic delivery times/dates, how to take calls and relay messages etc. Expectations should be a step up from those outlined in 2.3 to reflect the experience gained.

Unit 005 The customer service job role

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 1.4 2.1, 2.2, 2.3 3.1, 3.2, 3.3	Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands what the delivery of customer service involves. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded). The candidate could also use evidence of research on job advertisements published in newspapers, job centres or on internet based job pages.

Level: Entry 3
Credit value: 2
NDAQ number: M/601/6059

Unit aim

The aim of this unit is to help the learner to understand how to deal with telephone calls from customers.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know how to greet customers calling on the telephone
2. Know how to deal with customers calling on the telephone
3. Know how to deal with communication problems whilst on the telephone

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 006

Outcome 1

Handling telephone calls from customers

Know how to greet customers calling on the telephone

Assessment Criteria

The learner can:

1. state the importance of answering the telephone promptly
2. identify appropriate and friendly greetings to use when answering customer telephone calls.

Criteria Explained

For **1.1**, the candidate will need to give **one** reason why it is important to answer the telephone promptly, for example to avoid keeping the customer waiting, to create a positive impression and to avoid loss of business.

For **1.2**, the candidate should be able to give **two** appropriate greetings when answering customer telephone calls. This may include using their organisation's preferred greeting. The candidate should use language that is free from slang and not over-familiar with a tone that implies they are ready and willing to deal with the enquiry.

Unit 006

Outcome 2

Handling telephone calls from customers

Know how to deal with customers calling on the telephone

Assessment Criteria

The learner can:

1. state the importance of identifying the customer's needs
2. state how to confirm customer needs
3. describe how to pass on calls from customers to appropriate colleagues when customer needs are outside their own authority
4. state the importance of closing the call, thanking customers for their business or for information given.

Criteria Explained

For **2.1** the candidate should state why it is important to identify the customer's needs when handling telephone calls eg to find out why the customer is calling, to direct the call correctly or to help the customer.

For **2.2** the candidate must state **one** way of confirming customer needs eg clarifying or repeating key points the customer has said to confirm accuracy, asking open or closed questions.

For **2.3** the candidate needs to describe how to pass on calls from customers to appropriate colleagues when the customers needs are outside their own authority for example what to say to the customer, how to put on hold, how to select correct person/extension and how to transfer the call.

For **2.4** the candidate needs to state why it is important to close the call effectively, thanking the customer for their business or for information given, for example, so that the customer has a good experience which maintains the organisation's reputation, encourages repeat business and creates a positive impression of the candidate and the organisation.

Unit 006

Outcome 3

Handling telephone calls from customers

Know how to deal with communication problems whilst on the telephone

Assessment Criteria

The learner can:

1. state the types of communication problems that may occur
2. describe how to focus on the call and avoid distractions.

Criteria explained

For **3.1** the candidate should be able to state **two** possible problems that may occur when communicating with customers over the telephone, for example, being cut off/losing the call, poor reception or bad line, background noise, difficulties with language or accent, distractions.

For **3.2** the candidate will need to describe **two** ways to stay focussed on the call such as using notes, actively listening, not eating or drinking, not doing another task at the same time and minimising background noise by ignoring colleagues' conversations or turning off a radio, moving to another room or wearing a headset.

Unit 006 Handling telephone calls from customers

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 2.1, 2.2, 2.3, 2.4 3.1, 3.2	Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands how to handle telephone calls from customers. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).

Level: Entry 3
Credit value: 2
NDAQ number: M/601/6062

Unit aim

The aim of this unit is to help the learner to understand that the way they communicate with customers affects the customer service experience.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know the importance of speaking clearly to customers
2. Know the importance of listening actively to customers
3. Know the importance of using information from customers to contribute to good customer service

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owned by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 007

Outcome 1

Communicate effectively with customers

Know the importance of speaking clearly to customers

Assessment Criteria

The learner can:

1. state why it is important to speak clearly to customers
2. state how to speak clearly to customers about services or products
3. list the information to include when answering questions from customers about services or products.

Criteria explained

For **1.1**, the candidate should state why it is important to speak to customers clearly, for example, so that the information is correctly received and understood by the customer.

For **1.2**, the candidate must state how to communicate information about products or services to customers, for example, avoiding jargon or slang, using an appropriate tone and being concise.

For **1.3**, the candidate will need to identify **three** possible pieces of information to include when answering questions from customers about a products or services. This information could include the features or benefits of a product or service such as: size, colour, price, timescales, dates and availability.

Unit 007
Outcome 2

Communicate effectively with customers

Know the importance of listening actively to customers

Assessment Criteria

The learner can:

1. state how to give customers their full attention when listening to them
2. state why it is important to listen to customers.

Criteria explained

For **2.1** the candidate needs to describe **two** active listening techniques, for example, by making eye contact where possible, not interrupting, not turning back on customer, focussing fully on what the customer is saying by nodding/verbally agreeing, not being preoccupied, showing interest, and checking their own understanding.

For **2.2** the candidate should be able to give **one** reason why it is important to listen to customers eg so that the information from the customer is accurately received, so their needs are understood, so the customer feels valued, so you know what the customer wants and you can respond/act accordingly.

Unit 007

Outcome 3

Communicate effectively with customers

Know the importance of using information from customers to contribute to good customer service

Assessment Criteria

The learner can:

1. describe how to confirm with customers that details are correct
2. state the importance of reacting quickly to what they have heard from customers
3. list information they might hear from customers that should be passed to colleagues.

Criteria explained

For **3.1** the candidate must describe **two** ways of confirming with customers that details are correct eg by asking questions, summarising, repeating details, spelling words out, taking notes reading back.

For **3.2** the candidate must give **two** reasons why it is important to react quickly to what they have heard from the customer, for example, to minimise delays/damage, to meet timescales/deadlines, to meet their needs and expectations, to avoid complaints, to ensure good practice is continued and to pass on feedback.

For **3.3** the candidate must list **two** pieces of information they may hear from customers that needs to be passed on, such as praise or complaints about service or products, information about a health, safety or security hazards, information about competing organisations, requests for additional services or products, ideas for improvements and urgent messages.

Evidence guide

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 3.1, 3.2	Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands how to communicate effectively with customers. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).

Unit 008

Effective relationships with customers and colleagues

Level: Entry 3
Credit value: 2
NDAQ number: A/601/6064

Unit aim

The aim of this unit is to help the learner to appreciate the importance of relating effectively to customers and colleagues.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know how to relate effectively to customers
2. Know how to relate effectively to colleagues in a customer service team
3. Know the importance of positive body language when dealing with customers and colleagues.

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 008

Effective relationships with customers and colleagues

Outcome 1

Know how to relate effectively to customers

Assessment Criteria

The learner can:

1. identify methods of communication when dealing with customers
2. identify language to avoid because customers may consider it to be offensive
3. identify language to avoid because customers may consider it too familiar.

Criteria explained

For **1.1** the candidate should be able to identify **three** different methods of communicating with internal and/or external customers.

For **1.2** the candidate will need to give **two** examples of language to avoid, such as swearing or comments that may cause offence to customers of different ages, races, cultures and abilities.

For **1.3** the candidate should identify **two** examples of language that may be considered too familiar for example, the use of endearments (love, honey, dear, sweetheart), using customer's first name without permission, inappropriate use of humour or comments on appearance.

Unit 008

Effective relationships with customers and colleagues

Outcome 2

Know how to relate effectively to colleagues in a customer service team

Assessment Criteria

The learner can:

1. state why friendliness and helpfulness are useful in customer service teamwork
2. state how to help colleagues when doing routine customer service tasks
3. state what help could be reasonably expected from colleagues when carrying out routine customer service tasks
4. state what help colleagues could reasonably expect to be given when carrying out routine customer service tasks.

Criteria explained

For **2.1** the candidate should state why being friendly and helpful to colleagues is useful in a customer service team, for example, so that colleagues communicate better, support each other, work well together and create a pleasant and enjoyable working environment.

For **2.2** the candidate should identify **three** ways they could help colleagues when carrying out routine customer service tasks, for example, finding the correct paperwork or person, passing information to another colleague, faxing, photocopying, opening/sending out mail, offering refreshments, taking customers coats, reminding colleagues of deadlines.

For **2.3** the candidate should give **three** examples of what help could be expected from colleagues when carrying out routine customer service tasks, for example, where to find information or resources, costs for products or services, who to go to for help, clear instructions or basic training.

For **2.4** the candidate should identify **two** different types of help colleagues could reasonably expect to be given when carrying out routine customer service tasks without taking advantage of their willingness to help.

Unit 008

Effective relationships with customers and colleagues

Outcome 3

Know the importance of positive body language when dealing with customers and colleagues

Assessment Criteria

The learner can:

1. state what is meant by positive body language
2. state the importance of avoiding negative body language.

Criteria explained

For **3.1** the candidate should state what is meant by positive body language, for example, using your posture (standing up straight), facial expressions (smiling) and gestures (nodding in agreement) to create a good impression and to put the customer at ease.

For **3.2** the candidate should state the importance of avoiding negative body language, for example, negative body language could make them feel awkward, upset, threatened or frustrated. They may think you are bored or not interested in their needs and that the company is unprofessional.

Unit 008

Effective relationships with customers and colleagues

Evidence guide

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4 3.1, 3.2	<p>Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands how to establish relationships with customers and colleagues.</p> <p>A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).</p>

Level: Entry 3
Credit value: 2
NDAQ number: F/601/6065

Unit aim

The aim of this unit is to help the learner to understand customer service.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know basic customer service terms
2. Know the customer service process and its importance
3. Be able to learn from own experience of customer service

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Assessment Criteria

The learner can:

1. describe the differences between an external and an internal customer
2. state how different services and products could relate to each other and assist in providing customer satisfaction
3. identify regularly used customer service terms.

Criteria explained

For **1.1** the candidate should describe **two** differences between internal and external customers for example internal customers can be located within your own organisation and are people who you provide a service for. External customers are located outside of your organisation and are people or organisations who you provide a product/service to.

For **1.2** the candidate must state **two** examples of related products and services and explain how this assists in providing customer satisfaction eg buying a computer and receiving an after-sale help-line service, car insurance with breakdown cover or mobile phone purchased with insurance policy for loss or damage.

For **1.3** the candidate must identify at least **five** customer service terms which are contained in the Glossary of Terms.

Unit 009

Outcome 2

Introduction to customer service

Know the customer service process and its importance

Assessment Criteria

The learner can:

1. identify what is meant by customer expectations
2. identify what is meant by customer satisfaction
3. state how customer satisfaction results from meeting customer expectations
4. state the consequences if customer service does not meet customer expectations.

Criteria explained

For **2.1** the candidate should identify that customer expectations are what customers think should happen, the level/standard of service they expect and how they think they should be treated when asking for or receiving customer service.

For **2.2** the candidate must identify what is meant by customer satisfaction, for example, it is the positive feeling that a customer gets when their needs are met and they are happy with the customer service that has been provided.

For **2.3** the candidate should state that customers expect a certain level of service from an organisation and by delivering a good level of customer service, which meets their needs, the organisation has met the customers' expectations.

For **2.4** the candidate should give **two** consequences for the organisation if customer service does not meet customer expectations eg complaints, loss of business or negative impact on reputation.

Unit 009

Outcome 3

Introduction to customer service

Be able to learn from own experience of customer service

Assessment Criteria

The learner can:

1. identify situations when they are a customer
2. describe what matters to them when they are a customer.

Criteria explained

For **3.1** the candidate should describe **one** positive and **one** negative experience of being a customer and identify what was what good and bad, were they happy with the service delivery and did it meet their expectations and would they go back again?

For **3.2** the candidate should identify at least **three** factors that are important to them as customers, for example, product choice, helpful staff, prompt service, reasonable prices, brand name, quality of product/service.

Unit 009 Introduction to customer service

Evidence guide

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 2.1, 2.2, 2.3, 2.4	<p>Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands the customer service process and basic customer service terms.</p> <p>For assessment criteria 1.3, please refer to the Glossary of Terms. Please also refer to www.instituteofcustomerservice.com</p> <p>A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).</p>
3.1, 3.2	<p>Candidate reflection of their own experiences as a customer</p> <p>A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).</p> <p>Question and answer session.</p>

Level: Entry 3
Credit value: 2
NDAQ number: L/601/6067

Unit aim

The aim of this unit is to help the learner understand the importance of showing a polite and willing approach to customers and a positive attitude to customer service.

Learning outcomes

There are **two** learning outcomes to this unit. The learner will:

1. Know how to show a polite and willing approach to customers
2. Know how to show consideration to customers

Guided learning hours

It is recommended that **16** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 010

Outcome 1

Working in a customer focused way

Know how to show a polite and willing approach to customers

Assessment Criteria

The learner can:

1. state the importance of being positive and polite when dealing with customers
2. state the importance of dealing with customers in an appropriate timescale
3. identify what they can do to show the customer they are willing and enthusiastic
4. state how to show customers reliability.

Criteria explained

For **1.1** the candidate should be able to state why it is important to deal with customers positively and politely, for example in terms of their own and their organisation's reputation, in achieving customer satisfaction and creating a good impression.

For **1.2** the candidate should state **one** reason why it is important to deal with a customer in an appropriate timescale eg if a customer is kept waiting they may become angry or impatient, take their business elsewhere and/or they may complain.

For **1.3** the candidate should identify **two** ways of showing the customer that they are willing and enthusiastic eg smiling, greeting the customer politely, asking if they can help, maintaining eye contact and introducing themselves.

For **1.4** the candidate should state **two** ways they can demonstrate reliability, for example in keeping promises, keeping customers informed, being consistent, being honest and keeping to an agreed timescale.

Assessment Criteria

The learner can:

1. state the importance of being considerate to customers
2. identify what impresses customers
3. identify what might annoy customers
4. state how to put customers at ease
5. state how to show respect to customers.

Criteria explained

For **2.1** the candidate must state **one** reason why it is important to be considerate to the customer eg to meet their needs, to give a good impression, to give them a good experience so they want to return. They could also give an example of how to show consideration to a customer, eg holding the door for mother and pushchair, providing a chair for someone who has difficulty in standing, providing a quick service for a customer in a hurry.

For **2.2** the candidate should identify **two** ways they may impress customers. Areas which may impress customers could include having staff who are presented smartly, wearing name badges and are easily recognisable, helpful and knowledgeable.

For **2.3** the candidate should identify **two** ways they may annoy customers. Negative areas could include staff ignoring customers, being kept on hold on the telephone, staff lacking knowledge, poor displays of hygiene and inappropriate or scruffy/dirty clothing.

For **2.4** the candidate should give **two** examples of how to put customers at ease eg smiling, asking if they can help, giving them time to think and make decisions, reassuring them, keeping them informed and providing information or directions.

For **2.5** the candidate should be able to state **two** ways they can show respect to customers eg using their name in a respectful way, not being pushy or aggressive, use appropriate language, avoiding jargon. Candidates should be respectful of all customers regardless of age, gender, race, culture and ability.

Unit 010

Working in a customer focused way

Evidence guide

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.5	Written questions, candidate statement, workbook, assignment or question and answer session to check that the candidate understands how to work in a customer focused way. A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).

Level: 1

Credit value: 2

NDAQ number: R/601/6068

Unit aim

The aim of this unit is to help the learner to show they can dress, present themselves and communicate in a way that gives customers the right impression.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to dress appropriately for a customer service job
2. Be able to demonstrate an appropriate appearance for a customer service job
3. Be able to relate effectively to customers.

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owned by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 101

Create a good impression to customers

Outcome 1

Be able to dress appropriately for a customer service job

Assessment Criteria

The learner can:

1. describe appropriate dress requirements in different customer service jobs
2. identify inappropriate dress in different customer service jobs
3. dress in a way that meets customer expectations in a particular job.

Criteria explained

For **1.1** the candidate needs to list **three** different customer service based jobs and describe how the employees dress appropriately in order to create the right impression. Candidates could consider organisations who issue uniforms, name badges and/or specific clothing to meet health and safety requirements.

For **1.2** the candidate must identify inappropriate dress in **two** different customer service jobs. They could use examples from their own experiences as a customer, paying attention to areas such as a failure to wear uniform/name badge, untidy or dirty clothing, clothing too revealing or dressing without consideration to health and safety risks.

For **1.3** the candidate must comply with the organisation's dress code and be wearing clothes appropriate for their working environment, for example:

- Overalls (eg garage staff, decorators, supermarket)
- Special clothing for hygiene purposes (eg hats to keep hair tucked in, plastic gloves if working with food)
- Smart suit (worn in offices or banks to show professionalism)
- Trendy clothing (worn in a shop to advertise that shop's latest fashion)
- Clothing that fits a colour scheme to match the organisation's colours. Dress code could also vary to indicate more senior management eg a shirt, tie and formal trousers/skirt in a fast-food restaurant might signify more responsibility whereas staff at a lower level might wear a colour polo shirt and more robust trousers.

Unit 101

Create a good impression to customers

Outcome 2

Be able to demonstrate an appropriate appearance for a customer service job

Assessment Criteria

The learner can:

1. state the importance of making a good first impression on customers
2. identify personal appearance that may cause a negative reaction from customers
3. present self in a way that makes a positive impression on customers.

Criteria explained

For **2.1** the candidate must understand that you only get one chance to make a good first impression to customers; whether this is verbally, in writing or face-to-face with internal or external customers. They must consider how their behaviour and attitude influences customer trust, satisfaction, loyalty and whether the customer chooses to do business with your organisation.

For **2.2** the candidate must explain **three** types of appearance that could cause a negative reaction for example, somebody with dirty nails, unkempt hair, untidy appearance, too much makeup/perfume and revealing clothing. They should understand that appearance also incorporates attitude so a person who serves a customer with a scowling face could mean that they have no particular interest in the customer.

For **2.3** the candidate must make a positive impression on **two** different occasions showing they have presented themselves smartly, professionally, helpfully and politely. This could be observed by an appropriate witness in the workplace or assessor.

Unit 101

Outcome 3

Create a good impression to customers

Be able to relate effectively to customers

Assessment Criteria

The learner can:

1. describe methods of communicating with customers
2. describe why offensive language should be avoided when dealing with customers
3. use appropriate methods of communication when dealing with customers.

Criteria explained

For **3.1** the candidate needs to describe **three** different methods of communicating with customers and should use examples from written eg letter, email, text message, and verbal communication methods eg telephone, face-to-face.

For **3.2** the candidate must describe what might constitute offensive language, (swearing, slang, inappropriate comments relating to gender, race, culture, age or disability) and why they should never use any offensive language with customers regardless of how angry or aggressive the communication received becomes or if confrontation develops eg it will upset or aggravate the customer, it is not professional.

For **3.3** the candidate must demonstrate **three** occasions where they have chosen or adopted the most appropriate communication method to suit the situation and the needs of the customer. The candidate could demonstrate when they have chosen telephone communication over email in order to explain answers to questions quickly so that complaints are minimised or when it has been appropriate to clarify information on product or service options and prices in writing to the customer so that they have a permanent record.

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.3, 2.3, 3.3	<p>Observation of performance demonstrating how the candidate presents themselves and communicates appropriately with customers.</p> <p>Work products such as emails, messages they have written and other written communication carried out for the customer by the candidate. Confidential and/or product evidence can be seen by the assessor, their locations referenced and remain in the workplace.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal, face-to-face or written communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p>
1.1, 1.2, 2.1, 2.2, 3.1, 3.2	<p>A well-planned guided discussion between the candidate and assessor (This could be digitally recorded).</p> <p>Written questions, workbook, well-planned discussion, assignment or candidate statement, written around the assessment criteria to test the knowledge.</p>

Unit 102

Apply legislation, regulation and organisational procedures for customer service

Level: 1
Credit value: 3
NDAQ number: R/601/6071

Unit aim

The aim of this unit is to help the learner to comply with legislative and regulatory requirements and follow organisational procedures when involved in delivering customer service.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to follow customer service procedures for a particular job
2. Be able to protect the security of property and information when delivering customer service
3. Know the health and safety requirements of delivering customer service
4. Know external rules that impact on customer service delivery

Guided learning hours

It is recommended that **24** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 102 **Apply legislation, regulation and organisational procedures for customer service**

Outcome 1 Be able to follow customer service procedures for a particular job

Assessment criteria

The learner can:

1. describe the limits of own responsibility and authority for a particular job in customer service
2. carry out the steps in customer service procedures for a particular job.

Criteria explained

For **1.1** the candidate needs to select **one** customer service job and describe **three** limits of responsibility. The candidate must describe what they are allowed to do as defined within the job description and also when and from whom they need to gain authority. Candidates could use their job specification, job description or appraisal.

For **1.2** the candidate needs to follow through customer service procedures in **three** customer service tasks. These could be, eg taking payment, giving customers product/service information, updating customer information, logging enquiries, scheduling delivery, responding to problems, processing refunds or returns, dealing with faulty items or registering complaints. Candidates should show how they have followed organisational procedures when delivering customer service on, for example, processing refunds, returns or exchanges.

Unit 102

Apply legislation, regulation and organisational procedures for customer service

Outcome 2

Be able to protect the security of property and information when delivering customer service

Assessment criteria

The learner can:

1. follow organisational procedures for the security of property when delivering customer service
2. follow organisational procedures for security of information when delivering customer service.

Criteria explained

For **2.1** the candidate must show they have followed the organisational procedures in place for the security of property on **two** different occasions when delivering customer service. This could include using entry codes to access restricted areas, ensuring visitors sign in and are escorted to their destination, wearing name badges, securely storing personal possessions or restricting the carrying of money onto the shop floor, ensuring premises are locked and windows shut at the end of the day.

For **2.2** the candidate needs to demonstrate that they have followed and adhered to organisational procedures for the security of information on **two** different occasions when delivering customer service. They must pay attention to the Data Protection Act 1998 prior to giving the customer information. The candidate must show that they have met the requirements of their/the organisation to ensure that information is protected eg locking computers when away from work stations, not sharing passwords and keeping sensitive information out of sight.

Unit 102

Apply legislation, regulation and organisational procedures for customer service

Outcome 3

Know the health and safety requirements of delivering customer service

Assessment criteria

The learner can:

1. describe the health and safety rules that relate to the delivering of customer service
2. describe the main health and safety risks for customers and colleagues when delivering customer service.

Criteria explained

For **3.1** the candidate must understand the Health and Safety at Work Act 1974 (HASWA) when delivering customer service. The candidate needs to understand that health and safety rules are there to prevent injury and describe **three** Health and Safety rules that apply when delivering customer service. For example what to do, or who to report to in the event of an accident or fire, keeping themselves and their customer safe by spotting and reporting hazards/risks, wearing personal protective clothing and using safe working methods (safe VDU usage, correct manual handling techniques etc), following personal hygiene requirements if applicable.

For **3.2** the candidate needs to describe **three** main health and safety risks for customers and colleagues. For example wet floor, abusive or aggressive customers, dangerous stairways, obstructions, poor heating/lighting/ventilation. Reference may be made to the risk assessment procedure in place.

Unit 102

Apply legislation, regulation and organisational procedures for customer service

Outcome 4

Know external rules that impact on customer service delivery

Assessment criteria

The learner can:

1. describe the key legislation and external regulations relating to customer service delivery
2. describe actions to avoid because of legislation and regulation when delivering customer service
3. describe the importance of treating customers equally when delivering customer service.

Criteria explained

For **4.1** the candidate must describe **three** pieces of legislation or regulations relating to customer service delivery for example: The Sale of Goods Act 1979, Supply of Goods and Services Act 1982, Trade Descriptions Act 1968, Consumer Protection Act 1987, Data Protection Act 1998, the Consumer Protection (Distance Selling) Regulations 2005, The Financial Services Act, The Health and Safety at Work Act. Regulations might apply to the items that must not be sold to people under a certain age such as knives, harmful substances, tobacco, alcohol or lottery tickets.

For **4.2**, using the information from 4.1 the candidate must describe **three** actions that should be avoided because of the guidelines within the legislation and regulations listed above. The candidate should consider things they should not do such as sharing confidential customer information with unauthorised people (Data Protection Act 1998), describing goods that don't correspond with their description (Sale of Goods Act 1979), providing a service that is not at the proper standard (Supply of Goods and Services Act 1982) or misleading the customer on what the product can do and its quality (Trade Descriptions Act 1968).

For **4.3** the candidate needs to describe why it is important to treat customers equally regardless of sexuality, race, age, gender, disability, social status, general physical appearance. They should ensure that they pay attention to following company procedures and legislation when delivering customer service, treating all customers politely, professionally and helpfully at all times so that every interaction meets the customer's expectations.

Unit 102

Apply legislation, regulation and organisational procedures for customer service

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 3.1, 3.2, 4.1, 4.2, 4.3	<p>Written questions, candidate statements, workbooks or assignments written around the assessment criteria to test the knowledge of the candidate.</p> <p>A well-planned guided discussion between the candidate and assessor (This could be digitally recorded).</p> <p>For 1.1, a job description, contract of employment, job specification or appraisal could be used.</p> <p>For 3.1 and 4.1 reference could be made to websites containing information on customer service regulations: www.dti.gov.uk, www.instituteofcustomerservice.com, www.hse.gov.uk, www.direct.gov.uk/customer, www.ico.gov.uk</p>
1.2, 2.1, 2.2	<p>Observation of performance.</p> <p>Work products such as emails, letters to/ from customers, notes taken and computer update screens, information sought from colleagues, other departments or companies, visitor book/badges, password screens, company procedures on customer service delivery, security of property and information, research about the Data Protection Act 1998 (1.2, 2.1, 2.2).</p> <p>Confidential and/or product evidence can be seen by the assessor with their locations referenced and remain in the workplace.</p> <p>A diary of tasks performed accurately over time.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face-to-face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p>

Level: 1

Credit value: 3

NDAQ number: H/601/6074

Unit aim

The unit is about helping the learner to gain knowledge of the products and services and use that knowledge when dealing with customer queries and requests.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Know the services and products of a section or department
2. Know the customer's interests about the services and products of a section or department
3. Be able to clarify customer queries or requests
4. Be able to deal with queries or requests from customers

Guided learning hours

It is recommended that **22** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 103

Outcome 1

Deal with queries and requests

Know the services and products of a section or department

Assessment criteria

The learner can:

1. describe the services and products of a selected section or department
2. list the keys features and benefits to customers of the services and products of a selected section or department.

Criteria explained

For **1.1** the candidate needs to select one organisation and choose one section or department within this company describing **one** product and **one** service it provides. The candidate should be aware that some organisations only provide a product or a service and others provide both.

For **1.2** the candidate must list **two** key features and describe their corresponding benefits to the customer of the products or services that the section or department identified in 1.1 provides. For example a feature of a washing machine is that it has a half load option and the benefit of this is more economical and environmentally friendly, after sales care on electrical goods the benefit is a helpline provided.

Unit 103

Outcome 2

Deal with queries and requests

Know the customer's interests about the services and products of a section or department

Assessment criteria

The learner can:

1. describe the features and benefits of the services and products that most interest customers
2. identify questions that customers frequently ask about services and product and the preferred answers to those questions.

Criteria explained

For **2.1** the candidate must describe the key features and benefits of **two** of the most popular products or services provided (these could be the products/services identified in 1.1). Benefits to customers could include: saving money, user friendly, child friendly, long-term product life, for security/peace of mind, to save time, for flexibility, status/luxury.

For **2.2** the candidate needs to identify **four** frequently asked customer questions and their preferred answers. These may include questions on opening times, contact details, delivery timescales, information or specifications on the product or service, payment methods, company procedures for refunds, returns or exchanges or the complaints policy. The candidate could use the organisation's 'frequently asked questions' detailing preferred answers if there is one in place.

Unit 103

Deal with queries and requests

Outcome 3

Be able to clarify customer queries or requests

Assessment criteria

The learner can:

1. listen closely to questions and responses from customers
2. clarify queries and requests from customers.

Criteria explained

For **3.1** the candidate needs to show they have listened closely to **four** questions and responses from customers by paying full attention, making eye contact, avoiding distractions, perhaps taking down notes and confirming/summarising customer's response.

For **3.2** the candidate must show they have confirmed or clarified **two** requests and queries from customers in order to ensure they have understood it correctly. They could take notes or log the customer query and their response.

Unit 103

Deal with queries and requests

Outcome 4

Be able to deal with queries or requests from customers

Assessment criteria

The learner can:

1. deal with a query or request in a positive way
2. seek information or support if the query is outside of their own knowledge or authority.

Criteria explained

For **4.1** the candidate needs to deal with **three** customer requests or queries in a positive and professional way. This may include queries on payment methods, special offers, company procedures for refunds, returns or exchanges or product/service availability and/or specifications ensuring that the query is resolved successfully. The candidate should aim to follow company procedure correctly and could use the requests clarified in 3.2.

For **4.2** the candidate must show they have sought information or support from another colleague for **one** query or request which is outside their level of authority or knowledge base. This could involve passing the enquiry on to a senior team member or seeking advice from them.

Unit 103 Deal with queries and requests

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 2.1, 2.2	<p>Written questions, candidate statements, workbooks or assignments written around the assessment criteria to test the knowledge of the candidate.</p> <p>For 2.2, the candidate could use the organisations 'frequently asked questions' detailing preferred answer if there is one in place.</p> <p>A well-planned guided discussion between the candidate and the assessor (this could be digitally recorded).</p> <p>Candidates could use evidence gathered in Unit 106 assessment criteria 2.1 & 2.2.</p>
3.1, 3.2 4.1, 4.2	<p>Observation of performance</p> <p>Work products such as emails, letters to/ from customers, notes taken and computer update screens, or service information sought from colleagues, other departments or companies.</p> <p>Confidential and/or product evidence can be seen by the assessor; their locations referenced and remain in the workplace.</p> <p>A diary of tasks performed accurately over time or telephone call log.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face-to-face communication.</p> <p>A written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p>

Level: 1

Credit value: 2

NDAQ number: K/601/6075

Unit aim

The aim of this unit is to help the learner to collect detailed information from a customer when there is a customer problem and communicate it accordingly.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to collect detailed information from a customer with a problem
2. Be able to record information about a customer problem
3. Be able to communicate a customer problem to a colleague and a customer

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 104

Outcome 1

Record and communicate customer problems

Be able to collect detailed information from a customer with a problem

Assessment Criteria

The learner can:

1. question a customer to collect detailed information about a problem
2. check why the customer believes that their expectations are not being met.

Criteria explained

For **1.1** the candidate must question **one** customer in order to collect **three** pieces of detailed information about their problem for example, customer reference/contact details, what happened, when, with whom, what action(s) have been taken and what the customer wants. This can be on the telephone or face-to-face and could be observed by the assessor/witness. The candidate must ensure they have followed the guidelines of the Data Protection Act 1998 before discussing or revealing confidential customer information.

For **1.2** the candidate must check the reason why the customer is not happy, confirming why their expectations have not been met and ensure that they listen to their explanations. A 'customer' could be internal or external.

Unit 104

Outcome 2

Record and communicate customer problems

Be able to record detailed information about a customer problem

Assessment Criteria

The learner can:

1. keep a record of details about a customer service problem
2. confirm the accuracy of the record of a customer problem with the customer.

Criteria explained

For **2.1** the candidate must record the details of **one** customer service problem following organisational procedures and timescales and/or deadlines where applicable. These problems could be related to the quality of product or service, delays experienced, incorrect information sent out or quoted, attitude of staff, procedures or payment issues.

For **2.2** the candidate must clarify the details of the customer service problem from 2.1, repeating to confirm the customer's reference number, personal and contact details and summarising the problem to ensure they have recorded all of the information accurately (eg who, what, how, when and/or why a problem happened).

Unit 104

Outcome 3

Record and communicate customer problems

Be able to communicate a customer problem to a colleague and a customer

Assessment Criteria

The learner can:

1. select information about the customer and the problem, that is sufficient for a colleague to understand it
2. inform a colleague about the customer problem
3. give the customer information about the steps taken to deal with the problem.

Criteria explained

For **3.1** the candidate must select the most relevant details of **one** customer problem, summarising this problem so that a colleague can understand it, for example, considering who, what, how, when and/or why the problem happened and include customer reference/contact details.

For **3.2** the candidate must inform a colleague of the customer service problem identified in 3.1 ensuring that they have understood it. This could be communicated face-to-face, on the telephone, within written notes, diary pages, computerised file notes, database or spreadsheet recording or email. The colleague/s can be within their department or located elsewhere in the organisation.

For **3.3** the candidate must inform the customer what is going to happen next for the problem detailed in 3.1/3.2. The candidate will need to inform the customer what is happening, who is dealing with it and when they will be contacted so that the problem is dealt with effectively. Candidates may need to consider applying organisational procedures and/or follow legislation.

Unit 104

Record and communicate customer problems

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1,1.2, 2.1, 2.2	<p>Candidates could use evidence gathered in Units 103 and 106; full explanations of the criteria is explained below:</p> <p>For 1.1 candidates could use evidence gathered in Unit 106 (Answer telephone calls from customers) assessment criteria 2.1.</p> <p>For 3.2 candidates could use evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 4.2 and unit 106 (Answer telephone calls from customers) assessment criteria 2.3.</p> <p>Observation of performance demonstrating how the candidate collects information about problems from customers.</p> <p>Work products such as written notes, computerised file notes, database or spreadsheet recording, telephone log, email, letters or a diary of tasks performed accurately over time.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal, face-to-face or written communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A well-planned guided discussion between the candidate and the assessor (This could be digitally recorded).</p> <p>Confidential and/or product evidence can be seen by the assessor, their locations referenced and remain in the workplace.</p> <p>Websites containing information on customer service regulations: www.dti.gov.uk, www.instituteofcustomerservice.com, www.hse.gov.uk, www.direct.gov.uk/customer</p>

3.1, 3.2, 3.3

Level: 1

Credit value: 2

NDAQ number: M/601/6076

Unit aim

The aim of this unit is to help the learner understand their role in a customer service environment .

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Know the customer service principles that affect a customer related job
2. Know what is required of a particular job holder to meet customer expectations
3. Know the outline of entry level customer service jobs
4. Know the outline of customer service jobs that may be accessible after experience in first step jobs

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 105

Working in customer service

Outcome 1

Know the customer service principles that affect a customer related job

Assessment Criteria

The learner can:

1. state the service offer of the organisation
2. describe the role of a selected job holder in delivering the service offer.

Criteria explained

For **1.1** the candidate should understand the service offer of the organisation and summarise the customer charter if applicable. Alternatively, the candidate can choose one company and describe what it does, how it provides its products or services and who its customers are. The company could be in retail, hospitality, airport, travel agent, leisure centre, telesales, tour operator, local authority, NHS, insurance company, bank or a call centre. This could be a small or large organisation based locally, nationally or internationally who deals with customers face-to-face or on the telephone. The candidate can choose an organisation that interests them.

For **1.2** the candidate must select one customer service job role within this company and describe the job role and the responsibilities that go with this job role. Candidates could use a job description, contract of employment or job specification to detail how they deliver the service on offer.

Unit 105

Outcome 2

Working in customer service

Know what is required of a particular job holder to meet customer expectations

Assessment Criteria

The learner can:

1. describe the information the job holder needs to meet customer service expectations
2. describe how the behaviour of somebody in a customer service job affects the customer experience.

Criteria explained

For **2.1** the candidate must describe **four** pieces of information that they need to know in order to meet the customer's expectations. These may include knowledge of the range of products or services, their prices, how to check product/service availability, special offers and discounts, email addresses, payment methods, directions, company policies or legislation that have to be followed.

For **2.2** the candidate must describe how their body language, tone of voice, gestures, appearance and the use of proper words affect the customer's experience. They must consider how their behaviour and attitude influences customer trust, satisfaction, loyalty and whether the customer chooses to do business with your organisation.

Unit 105

Outcome 3

Working in customer service

Know the outline of entry level customer service jobs

Assessment Criteria

The learner can:

1. identify jobs delivering customer service
2. identify the customers for those jobs
3. describe what customers expect from somebody doing those jobs.

Criteria explained

For **3.1** the candidate needs to identify **three** entry level customer service based jobs. This may include entry positions in companies such as clearing tables in a café, stacking shelves in a shop, delivering newspapers and mail, students assisting at school/college open evenings, cleaning and/or general housekeeping. The candidate could use local or national press to identify these positions.

For **3.2** the candidate needs to use the **three** entry level customer service based jobs identified in 3.1 and describe who the customers are. This could include the service they provide to colleagues working elsewhere in the company (internal customers), or to members of the general public or any customers or companies outside your organisation (external customers).

For **3.3** the candidate must use the customers identified in 3.2 and describe what their expectations are. This could include their enquiry being dealt with swiftly, processing basic customer service information, a prompt service being offered, accurate product information provided, staff that are helpful or who offer a service which is easy to use. The candidate should use their own positive experiences as a customer.

Unit 105

Working in customer service

Outcome 4

Know the outline of customer service jobs that may be accessible after experience in first step jobs

Assessment Criteria

The learner can:

1. identify jobs that may follow from experience in first step customer service
2. identify the customers for those jobs
3. describe what customers expect from someone doing these jobs.

Criteria explained

For **4.1** the candidate must use the **three** customer services based jobs identified in 3.1 and describe the next step for career development for example, trainee sales assistant, salon assistant and glass collector. The candidate should consider how and where they could progress to give them more responsibility and a wider variety of tasks. The candidate could use local or national press to identify these positions.

For **4.2** the candidate needs to use the **three** next step customer service based jobs identified in 4.1 and describe who the customers are. These could include internal and external customers and should show the expansion of job responsibilities where the position may offer more decision-making, fewer routine tasks and the ability to work on own initiative.

For **4.3** the candidate must use the customers identified in 4.2 and describe what their expectations are. These may include answering enquiries, explaining company procedures, following up messages, taking payment, meeting deadlines, solving small problems, processing customer service information, describing and selecting products or services.

Unit 105

Working in customer service

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 2.1, 2.2	<p>Written questions, candidate statement, workbooks or assignments written around the assessment criteria to test the knowledge of the candidate.</p> <p>A well-planned guided discussion between the candidate and the assessor (This could be digitally recorded).</p> <p>The organisation selected could be a small or large organisation based locally, nationally or internationally who deals with customers face-to-face or on the telephone in any industry.</p> <p>For 1.2, a job description, contract of employment or job specification could be used.</p> <p>For 2.1, websites containing information on customer service regulations: www.dti.gov.uk, www.instituteofcustomerservice.com, www.hse.gov.uk, www.direct.gov.uk/customer</p>
3.1, 3.2, 3.3, 4.1, 4.2, 4.3	<p>The candidate could use evidence of research on job advertisements published in newspapers, job centres or on internet based job pages.</p>

Level: 1

Credit value: 2

NDAQ number: T/601/6077

Unit aim

The aim of this unit is to help the learner to understand how to deal with incoming telephone calls.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to greet customers calling on the telephone
2. Be able to deal with incoming customer telephone calls
3. Be able to respond to requests from customers

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 106

Outcome 1

Answer telephone calls from customers

Be able to greet customers calling on the telephone

Assessment Criteria

The learner can:

1. explain why an appropriate greeting is needed for customers
2. use the appropriate greeting when answering customer calls.

Criteria explained

For **1.1** the candidate needs to describe why it is vital to use an appropriate greeting when answering the telephone to customers. They should consider the importance of first impressions, setting the stage for the company and how this first call influences whether the customer will do business with the company.

For **1.2** the candidate must say the appropriate greeting when answering the telephone to **four** customers (internal or external). At least **two** of these calls should be observed by the Assessor/Witness and could be recorded or detailed on a telephone log. Where there is no preferred organisational greeting in place, the candidate could follow basic polite and professional principles for example hello/good morning/ good afternoon, the company name or department, their name and ask how they can help.

Unit 106

Outcome 2

Answer telephone calls from customers

Be able to deal with incoming customer calls

Assessment Criteria

The learner can:

1. use questions to clarify customer wishes and needs during telephone calls
2. deal with the customers' requests within the limits of own authority
3. pass on calls from customers to appropriate colleagues when customer needs are outside their own authority.

Criteria explained

For **2.1** the candidate must ask appropriate questions to confirm **two** caller's needs or requests, taking notes where necessary. This should include clarifying or repeating key points the customer has said to confirm accuracy and to show they have listened; spelling any difficult words. They should apply 'open' questioning techniques by asking who, what, when, how and why.

For **2.2** the candidate must handle **two** customer requests within the limits of their own authority. These could include verbally communicating prices or descriptions of products or services, agreeing to send out information to the customer, simplifying company procedures, taking a booking, providing email addresses, directions or contact details.

For **2.3** the candidate must pass on **two** calls to other colleagues where the customers' requests or needs fall outside their area of responsibility. They need to ensure they have selected the correct person to refer the request on to and transfer the call successfully. These colleagues may be located within their own department or elsewhere in the organisation.

Unit 106

Outcome 3

Answer telephone calls from customers

Be able to respond to requests from customers

Assessment Criteria

The learner can:

1. exchange information with customers over the telephone
2. summarise information from customers to check they have heard requests correctly.

Criteria explained

For **3.1** the candidate needs to show how they exchanged information over the telephone with **three** different customers. These could include prices, product or services available, opening hours, special offers, directions, contact details, company procedures, payment methods etc.

For **3.2** the candidate must verbally repeat and summarise **two** pieces of information from customers to ensure that they have confirmed their requests correctly. This could include personal data, customer reference numbers, payment details, date of birth, addresses, colours, sizes etc. Please note the candidate should not disclose any confidential customer information such as customer passwords or payment details.

Unit 106

Answer telephone calls from customers

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1	Written question, guided discussion or candidate statement written around the assessment criteria to test the knowledge.
1.2, 2.1, 2.2, 2.3 3.1, 3.2,	<p>Candidates could use evidence gathered in Units 103 and 107; full explanations are explained below:</p> <p>For 2.1, candidates could refer to evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 3.1 and 3.2.</p> <p>For 2.2, candidates could refer to evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 4.1 and Unit 110 (Work in a customer-friendly way assessment criteria 1.4.</p> <p>For 2.3, calls could be observed by the assessor/witness. Candidates could refer to evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 4.2.</p> <p>For 3.1, candidates could refer to evidence gathered in Unit 107 (Positive communication with customers) assessment criteria 2.1.</p> <p>For 3.2, candidates could refer to evidence gathered in Unit 107 (Positive communication with customers) assessment criteria 2.2.</p> <p>Observation of performance (two incoming telephone calls must be observed).</p> <p>Recorded telephone calls or telephone logs detailing the information exchanged with the customer, requests dealt with and queries passed on to appropriate colleagues. Confidential and/or product evidence can be seen by the assessor; their locations referenced and remain in the workplace.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A diary of tasks performed accurately over time.</p> <p>A well-planned guided discussion between the candidate and the assessor (This could be digitally recorded).</p>

Unit 107

Positive communication with customers

Level: 1

Credit value: 2

NDAQ number: A/601/6078

Unit aim

The aim of this unit is to help the learner to understand that the way they communicate makes for a positive customer service experience.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to hold conversations with customers
2. Be able to respond to requests from customers
3. Be able to use body language when dealing with customers

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 107

Outcome 1

Positive communication with customers

Be able to hold conversations with customers

Assessment Criteria

The learner can:

1. use questions to develop a customer conversation
2. describe how to listen actively to customers
3. listen actively to customers
4. close a conversation with a customer.

Criteria explained

For **1.1** the candidate must ask **three** customers appropriate questions to develop a customer conversation. This can be on the telephone or face-to-face and could be observed by the assessor/witness. The candidate could use notes taken and could apply 'open ended' questioning techniques by asking who, what, how and why.

For **1.2** the candidate needs to describe **three** active listening techniques, for example, by making eye contact where possible, focussing fully on what the customer is saying by nodding/verbally agreeing, not being preoccupied, showing interest and checking their own understanding.

For **1.3** the candidate must listen actively to **three** customers demonstrating the techniques described in 1.2.

For **1.4** the candidate needs to close **three** conversations politely and professionally. Candidates could use the same customer as in 1.3.

Unit 107

Outcome 2

Positive communication with customers

Be able to respond to requests from customers

Assessment Criteria

The learner can:

1. exchange information with customers in a conversation
2. summarise information from customers to check they have heard the request correctly
3. pass information from customers to colleagues.

Criteria explained

For **2.1** the candidate must exchange information over the telephone or face-to-face with **three** customers. These could include prices, details of product or services available, colours, styles, sizes, opening hours, special offers, directions, contact details, company procedures, payment methods etc.

For **2.2** the candidate must repeat and summarise **three** pieces of information from customers to ensure that they have confirmed their requests correctly. This could include personal data, customer reference numbers, payment details, date of birth, addresses, spelling of difficult words, colours, styles, sizes etc. Please note the candidate should not enclose any confidential customer information such as passwords or payment details.

For **2.3** the candidate must pass on **two** pieces of information from customers to colleagues. They need to ensure they have selected the correct person to refer the request on to and ensure that the information clarifies and summarises key points for their colleagues. The information could be passed on to colleagues verbally or in writing (eg telephone message, email).

Unit 107

Outcome 3

Positive communication with customers

Be able to use body language when dealing with customers

Assessment Criteria

The learner can:

1. identify types of body language that affects customers positively
2. identify types of body language that affect customers negatively
3. use positive body language when dealing with customers.

Criteria explained

For **3.1** the candidate needs to identify **three** types of body language that affect customers positively, paying attention to body posture, gestures and facial expressions/eye movements eg standing up straight, not fidgeting, holding head up, relaxing shoulders, paying attention to the customer, using hands confidently, smiling, speaking carefully and slowly and maintaining eye contact etc.

For **3.2** the candidate needs to identify **three** types of body language that affect customers negatively; paying attention to body posture, gestures and facial expressions/eye movements eg folding arms, being preoccupied, sounding or appearing bored, aggressive behaviour/bad language used, avoiding eye contact, fidgeting, frowning, raising eyebrows.

For **3.3** the candidate must be assessed on **three** occasions using positive body language when dealing with customers.

Unit 107 Positive communication with customers

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.3, 1.4, 2.1, 2.2 2.3, 3.3	<p>Candidates could use evidence gathered in Units 103, 106 and 110; full explanations of the criteria is explained below:</p> <p>For 1.1, candidates could refer to evidence gathered in Unit 106 (Answer telephone calls from customers) assessment criteria 2.1.</p> <p>For 1.3, candidates could refer to evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 3.1.</p> <p>For 1.4, candidates could refer to evidence gathered in Unit 110 (Work in a customer-friendly way) assessment criteria 3.4.</p> <p>For 2.1, candidates could refer to evidence gathered in Unit 106 (Answer telephone calls from customers) assessment criteria 3.1.</p> <p>For 2.2, candidates could refer to evidence gathered in Unit 106 (Answer telephone calls from customers) assessment criteria 3.2.</p> <p>For 2.3, candidates could refer to evidence gathered in unit 106 (Answer telephone calls from customers) assessment criteria 2.3.</p> <p>Observation of performance where candidates ask customers questions, listen to their needs and exchange information using positive body language.</p> <p>Note-taking or telephone logs can be used as evidence but the candidate should not enclose any confidential customer information such as passwords or payment details.</p> <p>Confidential and/or product evidence can be seen by the assessor, their locations referenced and remain in the workplace.</p> <p>A diary of tasks performed accurately over time.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A well-planned guided discussion between the candidate and assessor (This could be digitally recorded).</p>
1.2, 3.1, 3.2	<p>Written question, workbook, assignment or candidate statement, guided discussion, written around the assessment criteria to test the knowledge.</p>

Level: 1

Credit value: 2

NDAQ number: F/601/6079

Unit aim

The aim of this unit is to help the learner to understand the factors that contribute to effective customer service.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will

1. Know customer service terms and language
2. Know what contributes to good customer service in an organisation
3. Work effectively with colleagues in a customer service team

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Assessment Criteria

The learner can:

1. define key customer service terms and language
2. describe the connections between customer service, customer expectations and customer satisfaction.

Criteria explained

For **1.1** the candidate needs to define at least **five** of the key customer service terms contained in the Glossary of Terms. They should also give **three** examples of customer service language used in order to introduce themselves, welcome the customer, enquire how they can help or thank the customer, for example, 'Do you need help with your packing?' 'Is there anything else I can help you with?' 'Sorry to keep you waiting?' Candidates could use standard greetings implemented by their organisations. Customer service language should be positive, delivered with the appropriate tone and positive body language and use phrases in order to make sure every contact with the customer counts.

For **1.2** the candidate should describe that customer service can make or break every customer interaction. They should explain that by delivering a good level of customer service they can meet the customer's expectations and satisfy the customer's needs. This helps to retain the customer's business, maintains a good organisational reputation, sets them apart from their competitors and attracts new customers.

Unit 108

Outcome 2

Contribute to effective customer service

Know what contributes to good customer service in an organisation

Assessment Criteria

The learner can:

1. describe how company procedures contribute to good customer service
2. describe how good teamwork contributes to good customer service
3. describe the main points in a customer service process that influence customer satisfaction.

Criteria explained

For **2.1** the candidate must describe how important it is to follow company procedures in order to provide a consistent level of customer service. They should consider how procedures in place provide guidance on how to conduct business, what they can do for the customer, explain the customer's rights and are a source of information for the team and the customer.

For **2.2** the candidate must describe how good teamwork contributes to effective customer service. (T.E.A.M – Together, Everyone Achieves More). They should consider agreeing common goals, supporting each other, using open communication styles, showing mutual respect, each knowing their role and where they fit in, team commitment to improving performance, all being team players.

For **2.3** the candidate needs to describe the main points in a customer service process that affect whether the customer is satisfied. This should include identifying the customer's need, searching for information on product or services and giving the customer options.

Unit 108

Outcome 3

Contribute to effective customer service

Be able to work effectively with colleagues in a customer service team

Assessment Criteria

The learner can:

1. describe why friendliness and helpfulness are useful in customer service teamwork
2. describe the importance of not distracting colleagues when dealing with customers
3. identify what leads to effective teamwork
4. work effectively within a team when carrying out routine customer service tasks.

Criteria explained

For **3.1** the candidate should describe why being friendly and helpful to colleagues is useful in a customer service team, for example so that colleagues communicate better, support and respect each other, work well together and create a pleasant and enjoyable working environment.

For **3.2** the candidate must describe why it is important not to distract colleagues when dealing with customers. If distracted colleagues are not able to focus on the needs of the customer, they can seem disinterested which can create a bad customer service experience.

For **3.3** the candidate needs to identify what elements lead to effective team-work. They should consider having agreed common goals, supporting and making time for each other, using helpful and open communication techniques, showing mutual respect to all levels of customer service employees, listening to each other's opinions and suggestions, recognising and appreciating each other's role and all the team committing to improve performance.

For **3.4** the candidate must demonstrate that on **two** occasions, they have worked effectively within a customer service team carrying out routine customer service tasks. This must show what they have done, who they have involved, the procedures they may have followed and how they communicated. Routine customer service tasks could include sorting through mail, responding to product or service enquiries, checking availability, communicating special offers, passing on information to colleagues, processing payments, updating customer service information or agreeing delivery.

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 2.1, 2.2, 2.3, 3.1, 3.2, 3.3	<p>Written questions, workbook, well-planned discussion, assignment or candidate statement, written around the assessment criteria to test the knowledge.</p> <p>For assessment criteria 1.1, please refer to the Glossary of Terms for customer service language. Please also refer to www.instituteofcustomerservice.com</p> <p>For assessment criteria 2.3, candidates should refer to unit 109 (The customer service experience) assessment criteria 1.2 for guidance.</p>
3.4	<p>Observation of working effectively within a team carrying out customer service tasks.</p> <p>A diary of tasks performed accurately over time.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal, written or face-to-face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A well-planned guided discussion between the candidate and assessor (This could be digitally recorded).</p>

Unit 109

The customer service experience

Level: 1

Credit value: 2

NDAQ number: T/601/6080

Unit aim

This unit about helping the learner to understand the customer service model by relating it to personal experience.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Know about the customer service experience
2. Know how customer satisfaction is achieved
3. Be able to demonstrate a positive attitude when dealing with customers

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 109

The customer service experience

Outcome 1

Know about the customer service experience

Assessment Criteria

The learner can:

1. describe customer service situations
2. describe steps in a customer service process
3. describe the feelings of being a customer at different stages of the customer service process.

Criteria explained

For **1.1** the candidate must describe **four** different customer service situations. These could be on the telephone or face-to-face. It could also involve internal or external customers. The candidate could use their own positive or negative experiences as a customer when describing these customer service situations.

For **1.2** the candidate must describe the steps of the customer service process explaining each stage followed from:

- Identifying the customer's need – what they require, by when, gathering information through questioning
- Searching for information or product/service specifications – researching choices or options, looking for solutions
- Giving the customer options – offering choices to meet the desired outcome, dealing with requests or queries
- Confirming the customer's decision – selecting a product or service or a solution to the request or query
- Ensuring the customer is satisfied – meeting the desired outcome, offering alternatives or follow ups when customer satisfaction is not achieved

For **1.3** the candidate needs to describe how the customer feels at each of the above five stages of the customer service process. This could include being confused at the beginning until they have received further explanations on the product or service to being happy with the final product or service completed on time.

Unit 109

Outcome 2

The customer service experience

Know how customer satisfaction is achieved

Assessment Criteria

The learner can:

1. describe the link between customer expectations and customer satisfaction
2. describe service delivery that provides customer satisfaction
3. describe customer service that does not meet customer expectations and the reasons why.

Criteria explained

For **2.1** the candidate must explain customers expect a certain level of service and by delivering a good level of customer service, they can meet the customer's expectations and satisfy the customer's needs. This helps to retain the customer's business, maintains a good organisational reputation and sets them apart from their competitors.

For **2.2** the candidate must describe **three** elements of service delivery which contribute to the customer being satisfied. This could include their query being answered effectively, a prompt service being received, problems resolved swiftly and positively, service is easy to use, the staff are knowledgeable and helpful. The candidate could use their own positive experiences as a customer.

For **2.3** the candidate must describe **three** negative areas of customer service which contribute to customers not being satisfied. This could include long delays, staff being unavailable, unhelpful or lacking knowledge, incorrect product or price information, additional costs added on, confusing jargon, products or services advertised are not available, or misleading advertisements. The candidate could use their own negative experiences as a customer.

Unit 109

Outcome 3

The customer service experience

Be able to demonstrate a positive attitude when dealing with customers

Assessment Criteria

The learner can:

1. demonstrate willingness when dealing with customers
2. speak clearly to customers and put them at ease in different situations
3. recognise customer feelings and establish a rapport with them
4. show respect to customers
5. show reliability to customers.

Criteria explained

For **3.1** the candidate must show how they dealt with **three** customers enthusiastically and helpfully. This could be face to face or on the telephone, providing a service for internal or external customers.

For **3.2** the candidate must speak clearly, politely and professionally to the **three** customers dealt with in 3.1 showing that they have used appropriate language ('How can I help you?'), adopted a professional and helpful tone and positive body language (e.g. smiling and retaining eye contact). They should not use jargon and must demonstrate dealing with customers with different requests in various situations.

For **3.3** the candidate must recognise when customers are happy, upset, confused and angry and demonstrate how they have developed a rapport with customers by showing interest in the customer, using their name as appropriate, etc. They should consider how they empathise, thank the customer and apologise to them when things go wrong.

For **3.4** the candidate must demonstrate how they have showed respect to the **three** customers identified in 3.2 by using the customers' names professionally, listening and/or empathising with their requests, treating customers the same, paying attention to their needs, using a polite tone and appropriate language, asking questions to gain confirmation or clarification, being non-confrontational and thanking the customer.

For **3.5** the candidate must show how they have been reliable and helpful to the **three** customers identified in 3.4 by demonstrating that they have met the customer's needs, delivered the service reliably, met the deadlines or timescales agreed and provided the customer with the information, product or service when agreed.

Unit 109 The customer service experience

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
3.1, 3.2, 3.3, 3.4, 3.5	<p>Candidates could use evidence gathered in Units 105 and 110; full explanations of the criteria is explained below:</p> <p>For 2.2 Candidates could use evidence gathered in Unit 105 (Working in customer service) assessment criteria 2.2. For 2.3 Candidates could use evidence gathered in Unit 110 (Work in a customer-friendly way) assessment criteria 3.1. For 3.1 Candidates could use evidence gathered in Unit 110 (Work in a customer-friendly way) assessment criteria 1.5. 3.2 Candidates could use evidence gathered in Unit 110 (Work in a customer-friendly way) assessment criteria 1.2. 3.3 Candidates could use evidence gathered in Unit 110 (Work in a customer-friendly way) assessment criteria 2.1 and 2.2.</p> <p>Observation of performance demonstrating how the candidate demonstrates a positive attitude when dealing with customers.</p> <p>Work products such as emails, messages they have written and responded to and other written communication carried out for the customer by the candidate. Confidential and/or product evidence can be seen by the assessor; their locations referenced and remain in the workplace.</p> <p>A diary of tasks performed accurately over time.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal or face-to-face communication.</p>
1.1, 1.2, 1.3, 2.1, 2.2, 2.3	<p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A well-planned guided discussion between the candidate and assessor (This could be digitally recorded).</p> <p>Written questions, workbook, well-planned discussion, assignment or candidate statement, written around the assessment criteria to test the knowledge. Stages of the customer service process: www.instituteofcustomerservice.com</p>

Level: 1

Credit value: 2

NDAQ number: A/601/6081

Unit aim

The unit is about helping the learner to gain knowledge of the products and services and use that knowledge when dealing with customer queries and requests.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to demonstrate a polite and willing approach to customers
2. Be able to interact with customers in different situations
3. Be able to demonstrate consideration for customers

Guided learning hours

It is recommended that **18** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is owed by the Council for Administration (CFA).

Assessment

This unit is assessed by a candidate portfolio, graded pass only. Evidence for the portfolio can be collected in either the real workplace or a realistic working environment.

Unit 110

Outcome 1

Work in a customer-friendly way

Be able to demonstrate a polite and willing approach to customers

Assessment Criteria

The learner can:

1. show good manners when dealing with customers
2. greet customers politely and confidently
3. deal with customers within an appropriate timescale
4. respond willingly to customer requests
5. work in a way that shows customers they are willing and enthusiastic.

Criteria explained

For **1.1** the candidate needs to show they have been polite, professional and business-like when dealing with **three** customers either face-to-face or on the telephone. This could include internal or external customers and could be observed by the assessor/witness.

For **1.2** the candidate must greet all **three** customers politely and confidently using the organisation's preferred greeting where applicable. Where there is not a preferred greeting in place, the candidate should greet the customer professionally and pleasantly.

For **1.3** the candidate must deal with **two** customers within an appropriate timescale/deadline. This could involve face-to-face communication eg where customers have to be greeted on entering the store; or telephone communication eg whereby the candidate has to answer the call in a certain number of rings. These may be the same customers as identified in 1.1 and 1.2.

For **1.4** the candidate must respond to **three** customer requests within the limits of their own authority. These could include verbally communicating prices or descriptions of products or services, agreeing to send out information to the customer, taking payment, simplifying company procedures, providing email addresses, directions or contact details. These may be the same customers as identified in 1.1, 1.2 and 1.3.

For **1.5** the candidate must show on **two** occasions that they are willing and enthusiastic in the ways they work. This may include greeting the customer promptly, offering to help, giving the customer options and exceeding customer expectations. These may be the same customers as identified in 1.1, 1.2, 1.3 and 1.4.

Unit 110

Outcome 2

Work in a customer-friendly way

Be able to interact with customers in different situations

Assessment Criteria

The learner can:

1. recognise when a customer wants or needs attention
2. respond when a customer wants or needs attention.

Criteria explained

For **2.1** the candidate must recognise when **two** customers require attention or service. This could include the customer making eye contact, looking at products, picking up products and putting them down, appearing confused, reading information or looking for an available member of staff.

For **2.2** the candidate needs to follow through the customer's requests for attention as identified in 2.1 showing that they have responded politely, professionally, used proper language and acted within a minimum timeframe for each of the **two** customers. With telephone communication, the candidate will need to show their listening skills and how they have asked questions to gain clarification.

Unit 110

Outcome 3

Work in a customer-friendly way

Be able to demonstrate consideration for customers

Assessment Criteria

The learner can:

1. describe what might impress or annoy customers when carrying out routine customer service tasks
2. carry out routine customer service tasks in a way that shows consideration to customers
3. focus on customers and avoid distractions
4. thank customers for their business or information given.

Criteria explained

For **3.1** the candidate needs to describe **two** positive and **two** negative areas of customer service that impress or annoy customers. Areas which may impress customers could include having staff who are presented smartly, wearing name badges and are easily recognisable, helpful and knowledgeable. Negative areas could also include staff continuing to stock-fill when customers require attention, being on hold on the telephone for long periods of time, lack of knowledge, poor displays of hygiene and inappropriate or scruffy/dirty clothing.

For **3.2** the candidate must successfully carry out **three** routine customer service tasks for different customers, showing consideration for their various needs and feelings. This might include offering to pack a bag, providing a chair when there may be a wait. Routine service tasks could include sending out customer service information or updates in ways that are specific to customer needs (in large print, different languages), checking stock availability, communicating special offers or discounts, offering various payment methods, passing on their information to a colleague, scheduling delivery etc.

For **3.3** the candidate must show on **two** occasions how they have avoided distractions and interruptions in order to focus on the customer's needs and complete the tasks effectively. (Candidates may use the routine tasks detailed in 3.2).

For **3.4** the candidate must thank the **three** customers identified in 3.2 and ensure that the communication ends positively.

Unit 110 Work in a customer-friendly way

Evidence guide

Evidence must show that the candidate has sufficiently met the assessment criteria.

Outcome	Possible forms of evidence
1.1, 1.2, 1.3, 1.4, 1.5, 2.1, 2.2, 3.2, 3.3, 3.4	<p>For 1.4, candidates could use evidence gathered in Unit 103 (Deal with queries and requests) assessment criteria 3.2 and 4.1.</p> <p>Observation of performance.</p> <p>Work products such as requests received by email, on the telephone, messages received, face-to-face or written communication and tasks carried out for the customer by the candidate.</p> <p>Confidential and/or product evidence can be seen by the assessor; their locations referenced and remain in the workplace.</p> <p>A diary of tasks performed overtime accurately.</p> <p>Witness testimony from the teacher or a reliable person in the workplace confirming candidate actions and/or confirmation of verbal/face-to-face communication.</p> <p>Written statement from the candidate describing performance that has taken place and confirmed by a reliable person in the workplace or a teacher.</p> <p>A well-planned guided discussion between the candidate and the assessor (This could be digitally recorded).</p>
3.1	<p>Written question, guided discussion or candidate statement written around the assessment criteria to test the knowledge. The candidate could use their own positive and negative experiences as a customer.</p>

Appendix 1 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.

Providing City & Guilds qualifications – a guide to centre and qualification approval

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.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

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 such on such things as:

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

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business_unit@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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