

Level 2/3 Certificate in Customer Service (4417)

January 2024 Version 2.8



Qualification at a glance

Subject area	Customer Service
City & Guilds number	4417
Age group approved	Level 2 – All Level 3 – 16+
Assessment	Assignment Online test
Support materials	Centre handbook Assessment pack
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds number	Accreditation number
Level 2 Certificate in Customer Service	4417-02	500/6329/7
Level 3 Certificate in Customer Service	4417-03	500/6206/2

Version and date	Change detail	Section
2.1 October 2012	Updated test specification for unit 201	Assessment - test specifications
2.2 October 2012	Amendments to test specifications for units 201 and 272	Assessment - test specifications
2.3 June 2013	Reference to sample test papers removed	Support Materials
2.4 August 2015	Amended the wording under the structure for 4417-03	Introduction
2.5 February 2016	Amended the time constraints information for the online tests	Assessment
2.6 October 2017	Added TQT and GLH details Deleted QCF	Qualification Structure Introduction to the qualification Relationship to other qualification Appendix1

2.7 April 2022	<p>Unit 201/271 Outcome 5 Notes of guidance:</p> <p>1.5.1:</p> <ul style="list-style-type: none"> ○ Deleted Consumer Protection Regulations ○ Added Consumer Protection from Unfair Trading Regulations ○ Added note on Sale of Goods Act 1979 replaced by the Consumer Rights Act 2015 ○ Deleted Unsolicited Goods and Services Act ○ Added The Consumer Rights Act ○ Added note on Supply of Goods and Services Act replaced by the Consumer Rights Act 2015 <p>1.5.2 updated:</p> <ul style="list-style-type: none"> ○ Added Equality Act ○ Deleted Disability Discrimination Act, Sex Discrimination Act and Race Relations Act <p>1.5.4:</p> <ul style="list-style-type: none"> ○ Updated guidance on Data Protection Act <p>1.5.5:</p> <ul style="list-style-type: none"> ○ Updated guidance on Data Protection Act <p>Unit 301/371 Outcome 4 Notes of guidance:</p> <p>1.4.1 updated:</p> <ul style="list-style-type: none"> ○ Deleted Consumer Protection Regulations, Disability Discrimination Act 1995, Sex Discrimination Act and Race Relations Act ○ Added Consumer Protection from Unfair Trading Regulations, Equality Act ○ Removed Year from Data Protection Act <p>1.4.2:</p> <ul style="list-style-type: none"> ○ Removed Year from Data Protection Act ○ Updated guidance on Data Protection Act <p>City & Guilds address updated</p>	Unit guidance
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2.8 January 2024	<p>Unit 201 / 271 Notes of guidance: Outcome 1 updated 1.1.10: <ul style="list-style-type: none"> ○ added social networking sites Outcome 2 updated 1.2.5: <ul style="list-style-type: none"> ○ added feedback submitted online eg: product or service reviews Outcome 3 updated 1.3.2: <ul style="list-style-type: none"> ○ added online chat as an effective method of communication Outcome 5 updated 1.5.1: <ul style="list-style-type: none"> ○ added 1982 to Supply of Goods and Services Act ○ Consumer Protection Act updated updated 1.5.4: <ul style="list-style-type: none"> ○ Data Protection Act Principles updated updated 1.5.5: <ul style="list-style-type: none"> ○ Data Protection Act Principles updated updated 1.5.6 <ul style="list-style-type: none"> ○ Organisational ethics updated Unit 202 Notes of guidance Outcome 3 updated 2.3.1: <ul style="list-style-type: none"> ○ Instant chat added Unit 272 Supporting Information: Outcome 1 updated 1.6: <ul style="list-style-type: none"> ○ social networking sites added Outcome 3 updated 3.1: <ul style="list-style-type: none"> ○ instant chat added Outcome 4 updated 4.1: <ul style="list-style-type: none"> ○ to feedback submitted online eg: product or service reviews added Unit 301/371 Notes of guidance: Outcome 2 updated 1.2.2 to include online chat Outcome 4 updated 1.4.1: <ul style="list-style-type: none"> ○ Consumer Protection updated updated 1.4.2: <ul style="list-style-type: none"> ○ Data Protection updated </p>	Unit guidance
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	<p>Unit 302 Notes of guidance: Outcome 1 updated 2.1.2: ○ feedback submitted online eg: product or service reviews included updated 2.1.3: Outcome 2 updated 2.2.3: ○ social media networks included</p> <p>Unit 372 notes of guidance: Outcome 1 updated 1.2 : ○ feedback submitted online eg: product or service reviews included updated 1.3: ○ feedback submitted online eg: product or service reviews included Outcome 3 updated 3.1 : ○ instant chat added</p>	
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Contents

1	Introduction	7
	Structure	8
2	Centre requirements	10
	Approval	10
	Resource requirements	10
	Candidate entry requirements	11
3	Delivering the qualification	12
	Initial assessment and induction	12
	Support materials	12
	Recording documents	12
	Assessment	13
4	Units	17
	Unit 201 / 271 Delivery of effective customer service	18
	Unit 202 Supporting the customer service environment	33
	Unit 272 Supporting the customer service environment	45
	Unit 301 / 371 Principles of customer service delivery	55
	Unit 302 Developing and improving the customer service process	66
	Unit 372 Developing and improving the customer service process	75
	Relationships to other qualifications	83
	Appendix 1 Sources of general information	85



1 Introduction

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

Area	Description
Who are the qualifications for?	They are for candidates who work or want to work in the customer service sector.
What do the qualifications cover?	This qualification aims to develop knowledge and understanding of the principles of effective customer service and develop the practical skills required to support the customer service environment.
What opportunities for progression are there?	<p>The Level 2 qualification allows candidates to progress into employment or to the following City & Guilds qualifications:</p> <ul style="list-style-type: none">• Level 3 Certificate in Customer Service and/or Level 2 or 3 NVQ/SVQs in Customer Service.• NVQs in other work-related areas (for example Retail, Administration, Contact Centres, IT and other technical sectors). <p>The Level 3 qualification allows candidates to progress into employment or to the following City & Guilds qualifications:</p> <ul style="list-style-type: none">• Level 3 or 4 NVQ/SVQs in Customer Service.• NVQs in other work-related areas (for example Retail, Administration, Contact Centres, IT and other technical sectors).• Candidates could progress into employment in any industry in a customer service role and/or onto a Team Leading qualification with the Institute of Leadership and Management (ILM).

Structure

Level 2 Certificate in Customer Service

To achieve the Level 2 Certificate in Customer Service learners must achieve 13 credits from units (201 **or** 271) and (202 **or** 272)

UAN	City & Guilds unit number	Unit title	Level	GLH	Credit	Assessed by
J/600/1003	201	Delivery of effective customer service	2	50	6	M/C test
J/600/0658	202	Supporting the customer service environment	2	65	7	Assignment
J/600/1003	271	Delivery of effective customer service	2	50	6	Assignment
F/504/1358	272	Supporting the customer service environment	2	65	7	M/C test

The additional unit types allow for a combination of assessments for example -

To run the qualification the rule of combination will still consist of **2 units**, however centres now have the choice of the assessment type.

To access the online assessments only, candidates need to be registered on 4417-02 and use the components 201 and 272 to access the on line tests, when claiming certification please submit 201 and 272 to trigger the certificate.

To access the paper based assessments only, candidates need to be registered on 4417-02 and use the assignments for 202 and 271, when claiming certification please submit 202 and 271 to trigger the certificate.

Candidates could use a mixture of assessment type eg Online and paper based assessment eg 201 and 202.

4417-03 Level 3 Certificate in Customer Service

To achieve the Level 3 Certificate in Customer Service learners must achieve 13 credits from units (301 **or** 371) and (302 **or** 372)

UAN	City & Guilds unit number	Unit title	Level	GLH	Credit	Assessed by
L/600/0659	301	Principles of customer service delivery	3	50	6	Assignment
F/600/0660	302	Developing and improving the customer service process	3	55	7	Assignment
L/600/0659	371	Principles of customer service delivery	3	50	6	M/C test
F/504/1361	372	Developing and improving the customer service process	3	55	7	M/C test

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
City & Guilds Level 3 Certificate in Customer Service	105	130
City & Guilds Level 2 Certificate in Customer Service	115	130

The additional unit types allow for a combination of assessments for example –

To run the qualification the rule of combination will still consist of **2 units**, however centres now have the choice of the assessment type.

To access the online assessments only, candidates need to be registered on 4417-03 and use the components 371 and 372 to access the on line tests, when claiming certification please submit 371 and 372 to trigger the certificate.

To access the paper based assessments only, candidates need to be registered on 4417-03 and use the assignments for 301 and 302, when claiming certification please submit 301 and 302 to trigger the certificate.

Candidates could use a mixture online and paper based assessment type e.g. 301 and 372.



2 Centre requirements

Approval

There is no fast track approval for this qualification, existing centres who wish to offer this qualification must use the **standard** Qualification Approval Process.

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

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

Resource requirements

Centre staffing

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

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

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

Assessors and Internal Quality Assurer

Assessor/Internal Quality Assurer TAQA qualifications are valued as qualifications for centre staff, but they are not currently a requirement for the qualifications.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

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.

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

Age restrictions

There is no age restriction for the Level 2 Certificate in Customer Service.

For the Level 3 Certificate in Customer Service City & Guilds cannot accept any registrations for candidates under 16 as this qualification is not approved for under 16s.



3 Delivering the qualification

Initial assessment and induction

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

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

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

Support materials

The following resources are available for these qualifications:

Description	How to access
Marking guide	www.cityandguilds.com
Assignment guide	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

Recording documents

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

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

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

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the qualification consultant, 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.



Assessment

Candidates must:

- successfully complete one assignment **or** online test for each mandatory unit

City & Guilds has written the following assessments to use with this qualification:

- online multiple choice tests, using e-volve
- assignments, including different versions

Unit	Title	Assessment method	Where to obtain assessment materials
201	Delivery of effective customer service	Online multiple choice test The assessment covers all of the knowledge outcomes.	Examinations provided on Evolve.
202	Supporting the customer service environment	Assignment Externally set assignment, locally marked and externally verified.	Download available from City & Guilds website www.cityandguilds.com
271	Delivery of effective customer service	Assignment Externally set assignment, locally marked and externally verified.	Download available from City & Guilds website www.cityandguilds.com
272	Supporting the customer service environment	Online multiple choice test The assessment covers all of the knowledge outcomes.	Examinations provided on Evolve.

Unit	Title	Assessment method	Where to obtain assessment materials
301	Principles of customer service delivery	Assignment Externally set assignment, locally marked and externally verified.	Download available from City & Guilds website www.cityandguilds.com
302	Developing and improving the customer service process	Assignment Externally set assignment, locally marked and externally verified.	Download available from City & Guilds website www.cityandguilds.com
371	Principles of customer service delivery	Online multiple choice test The assessment covers all of the knowledge outcomes.	Examinations provided on Evolve.
372	Developing and improving the customer service process	Online multiple choice test The assessment covers all of the knowledge outcomes.	Examinations provided on Evolve.

Time constraints

The following time constraints are applied to the assessment of this qualification:

- The 201 and 272 online tests are allocated one hour and 15 minutes each to complete. The 371 and 372 online tests are allocated one hour each to complete.
- It is anticipated that an assignment should take no longer than three hours, in total to complete. Centres finding that assignments are taking longer, should contact the external verifier for guidance.
- All assignments must be completed and assessed within the candidate's period of registration. Centres should advise candidates of any internal timescales for the completion and marking of individual assignments.

Test specifications

The way the knowledge is covered by each test is laid out in the tables below:

Test 1: Unit 201
Duration: 1 hour and 15 minutes

Unit	Outcome	Number of questions	%
201	1. Describe the principles of customer service	15	33
	2. Understand how customer needs and expectations are formed	9	20
	3. Understand principles of responding to customers' problems or complaints	8	18
	4. Identify the interpersonal and team working skills required in the service environment	5	11
	5. Identify the legislation which supports the customer service	8	18
	Total	45	100

Test 2: Unit 272
Duration: 1 hour and 15 minutes

Unit	Outcome	Number of questions	%
272	1. Know the practical skills required to deliver effective customer service	11	24
	2. Know how to meet customer needs and expectations	8	18
	3. Know how to communicate effectively with customers	14	31
	4. Understand how to improve customer service and develop self	12	27
	Total	45	100

Test 3: Unit 371
Duration: 1 hour

Unit	Outcome	Number of questions	%
371	1. Describe the principles which impact on customer expectations	7	18
	2. Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction	12	30
	3. Describe solutions to customer service problems and complaints within organisational constraints	11	27
	4. Explain how legislation affects the customer service process	10	25
	Total	40	100

Test 3: Unit 372
Duration: 1 hour

Unit	Outcome	Number of questions	%
372	1. Understand how customer feedback can improve the customer service process	11	27
	2. Understand the process of promoting products and services	10	25
	3. Understand the importance of effective teamwork and the monitoring of performance	19	48
	Total	40	100



4 Units

Availability of units

Below is a list of the learning outcomes for all the units.

Structure of units

These units have the following:

- City & Guilds reference number
- unit accreditation number (UAN)
- title
- level
- credit value
- guided learning hours
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- notes for guidance.

Unit 201 / 271 Delivery of effective customer service

Level: 2
Credit value: 6
UAN: J/600/1003

Unit aim

To enable the candidate to develop an appropriate knowledge and understanding of the principles of effective customer service.

Learning outcomes

There are **five** learning outcomes to this unit. The learner will be able to:

1. Describe the principles of customer service
2. Understand how customer needs and expectations are formed
3. Understand principles of responding to customers' problems or complaints
4. Identify the interpersonal and team working skills required in the customer service environment
5. Identify the legislation which supports the customer service process

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 2 – 1, 5, 6, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 21, 22, 23, 31, 36, 37, 38.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 1 – C1.1, C1.2, C1.3; Level 2 – C2.1a and 1b, C2.2
- AON Level 1 - N1.1
- ICT Level 1 – ICT1.1, ICT1.2

Assessment and grading

This unit will be assessed by:

- An online multiple choice test **or** an assignment

Unit 201 / 271 Delivery of effective customer service

Outcome 1 Describe the principles of customer service

Assessment Criteria

The learner can:

- 1.1.1. Identify the purpose of customer service
- 1.1.2. Describe how customer service affects the success of the organisation
- 1.1.3. Describe different types of customers of an organisation
- 1.1.4. Identify the range of customer needs
- 1.1.5. Identify the customer service information which may be retained.
- 1.1.6. Identify the difference between providing a product and providing a service
- 1.1.7. Describe what is meant by an after-sales service
- 1.1.8. Describe what is meant by a Unique Selling Point (USP) and a Unique Service Offer (USO)
- 1.1.9. Identify the methods a customer service deliverer can use to keep product and service knowledge up-to-date
- 1.1.10. Describe how an organisation can promote its products and/or services

Notes for Guidance

1.1.1

Good customer service is:

- ensuring customer needs are met
- encouraging customer loyalty
- forming a relationship with customers
- ensuring customers leave happy and return
- ensuring customers pass on positive feedback to others.

1.1.2

Having experienced a certain level of customer service from an organisation, customers will expect that level of customer service in the future, whether good or bad.

Good customer service can give an organisation an edge over its competitors while poor service can result in a loss of business. A reputation for poor service can be difficult to change.

1.1.3

A customer can be an individual or an organisation. Customers can be internal eg from another part of the same organisation or colleagues; external eg individuals, businesses including suppliers.

1.1.4

Different customers will have different needs and expectations from an organisation eg that timescales are met, promises kept, value for money, quality presentation, employees are knowledgeable and friendly, products are fit for use/purpose, are reliable, easy to use.

Other types of customer needs exist where customers' health, language skills, age, cultural background or learning difficulties influence how a service provider may need to adapt their behaviour and their methods of communication to meet these individual needs.

1.1.5

There is a range of customer service information/records which organisations may retain eg personal data – customer's name, address, account details, previous purchases; customer feedback on a product or service – user evaluation; warranty/guarantee records; records of complaints.

1.1.6

Products are tangible ie a customer can buy a product like a car and own it. However, they cannot own a service. A product is produced by a manufacturing process and you subscribe to a service. The main difference between providing products and a service is that contact that is more personal may be required when marketing a service as compared with marketing products. Providing a product may also involve providing after-sales service as in help-line facilities following the sale of a computer.

1.1.7

An after sales service - providing support for a service or a product after purchase eg help-line facilities following the sale of a computer. After sales service for products may involve dealing with warranties, guarantees, exchanges, repair agreements, refunds. There may be various terms, legal constraints and organisational policies, which need to be considered.

1.1.8

A USP - Unique Selling Point makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines. A Unique Selling Point or Proposition (USP) defines an organisation's competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing, influencing the customer's choice of products and services.

A USO – Unique Service Offer makes a service different or better from its competitor(s) eg 24-hour availability. A USO is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers conduct business with organisations and use their products or services. Customers buy benefits and solutions and the candidate should be familiar with the technique of selling features and benefits and should know how these compare with those of competitors.

USPs and USOs are used to differentiate what one organisation provides by way of products and/or services from another.

1.1.9

Keeping up-to-date with product and services knowledge is vital. Various sources of information about products and/or services will be available within an organisation eg catalogues, brochures, price lists, colleagues, internet, intranet, training sessions, organisational product and/or service information/literature, feedback from customers.

1.1.10

Promotion methods can be leaflets, telephone calling, demonstrations, mailshots, promotional videos, newspaper (national and local) advertisements, television advertisements, local/national radio advertisements, social networking sites.

Unit 201 / 271 Delivery of effective customer service

Outcome 2 Understand how customer needs and expectations are formed

Assessment Criteria

The learner can:

- 1.2.1. Describe the purpose of an organisation's service offer
- 1.2.2. Describe how customer expectations are formed
- 1.2.3. Describe the interrelationship between customer satisfaction and customer expectations
- 1.2.4. Describe how customer needs can be identified
- 1.2.5. Identify the methods of obtaining customer feedback
- 1.2.6. Describe how an organisation can maintain customer loyalty
- 1.2.7. Identify why it is important to ensure effective customer relationships are maintained
- 1.2.8. Describe why it is important for a customer to be able to identify a 'brand'

Notes for Guidance

1.2.1

Organisation's service offer - also known as a customer charter – is the organisation's statement about the level of service they will offer eg some customer charters will set out how they will compensate a customer when customer service has not been delivered in line with the charter; or it will clearly state the timescales for responses.

The service offer sets the basis on which the organisation will provide a service to its customers. Customers will know this is what they can expect while organisations know what they must deliver.

1.2.2

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Expectations are formed eg

- through what customers hear and see
- what they read and the messages the organisation sends (ie via its reputation and brand)
- what actually happens to them when dealing now and in the past with an organisation.

Customer expectations are also heavily influenced by word of mouth (eg friends and family) and also the media.

Customers may have experiences with similar organisations which impact upon their overall impression and expectations of that particular service industry, eg hotels and restaurants, supermarkets, banking, insurance.

1.2.3

Customer service equals the totality of what an organisation does to meet customer expectations and produce customer satisfaction. Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Customer satisfaction then occurs when a customer is happy with the service provided.

However, it is not sufficient for some organisations to simply achieve customer satisfaction; they want to do better and talk in terms of exceeding customer expectations, delighting the customer or surprising the customer. Customer satisfaction is still achieved but the perception is to a greater degree.

1.2.4

Customer needs can be identified through the use of well-developed inter-personal skills which enable a service deliverer to accurately identify those needs.

Customers at times do not have a clear understanding of their needs. Assisting in determining needs is a valuable service to the customer and this can be done by asking the customer relevant questions and listening carefully to the customer's responses.

1.2.5

Customer feedback is what the customer provides to an organisation about the customer service experienced. It may be collected by the organisation formally using questionnaires, comment cards, competitions, focus groups or surveys (telephone or mail) feedback submitted online eg: product or service reviews. This is sometimes called formal feedback.

All staff in an organisation has a responsibility for gathering spontaneous customer feedback, eg chance remarks or comments, verbal or in writing made by customers without being asked. This is informal feedback.

1.2.6

If the service customers receive is consistently good, loyalty will be built. If there is a good background of achieving customer satisfaction, customer loyalty may exist but even when things go wrong, organisations can recover from a negative situation with an individual customer by working towards a solution. Repeat business is influenced by a customer's on-going perception of the service they receive.

Customer loyalty can be rewarded by making special customer service arrangements and offers for repeat customers, eg points programme, loyalty scheme and special offers.

1.2.7

Customer relationships exist where customers provide repeat business over time with the same organisation and/or service provider. Good customer relationships are important to a service provider because they build customer loyalty, resulting in repeat business.

It is beneficial for an organisation to have loyal customers as it tends to be cheaper and easier to retain business with an existing satisfied customer than it is to find a new customer.

1.2.8

Knowing the 'brand' of the product or service is an important message to transmit to customers. A brand is a promise to customers. A strong brand name tells customers; 'you know the name, you can trust the promise'. Generally there is a 'logo' and instantly customers have a visual reminder of what the company is offering and promising customers and they know what to expect. Customers can be attracted to the brand above that of the competition.

Unit 201 / 271 Delivery of effective customer service

Outcome 3 Understand principles of responding to customers' problems or complaints

Assessment Criteria

The learner can:

- 1.3.1. Identify common causes of customer problems and complaints
- 1.3.2. Identify different methods of communication
- 1.3.3. Describe the importance of adapting methods of communication and behaviour to meet the individual needs of customers
- 1.3.4. Explain how the non verbal communication of the service deliverer can affect the behaviour of the customer
- 1.3.5. Describe how personal presentation, approach and attitude will influence the perception of the service delivered

Notes for Guidance

1.3.1

Customer problems and complaints can be caused through eg faulty goods, poor quality, incorrect stock, failure to return calls, failure to meet deadlines, poor staff attitude.

1.3.2

The most effective methods of communication are eg

- face-to-face
- written communication eg letter, email
- telephone and text
- online chat

Face-to-face – is using regular eye contact and active listening. Eye contact may differ across cultures; 'active listening is about head nodding, gestures and repeating back phrases that are heard to confirm understanding.

Written communication is eg letter, email, memos and reports. There will be guidelines on when and how to use written communication eg house styles, language to be used. Written communication may be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, or if they are going to be on hold. Speaking clearly and slowly to allow for the possibility that reception on the 'phone line may be poor; adapting speech to meet individual customer needs. Telephone communication is used when an immediate response is needed, when more detail needs to be obtained or when negotiation is necessary.

Online chat is a way of communicating with customers in real-time regarding their problem or complaint. Customers can ask questions to obtain a quick response.

1.3.3

It is important to adapt methods of communication to meet the individual needs of a range of customers for example those with:

- language difficulties
- health issues
- different age groups
- cultural differences
- learning difficulties

It is important to communicate in a clear, polite and confident way eg where there are language difficulties it may require the service deliverer to talk slowly, clearly and without the use of jargon. The service deliverer should treat the customer with respect at all times and work with the individual to meet their needs.

1.3.4

Non-verbal communication is the use of body language eg

- Gestures
- Posture
- Facial expression
- Eye contact
- Personal presentation eg dress

It is important to be aware of the potential impact of a range of body language variations eg

- Standing very close to a customer versus standing at a distance
- Folding arms versus open arms
- Giving lots of eye contact versus giving no eye contact
- Pointing fingers, frowning versus smiling

Body language can signal pleasure, anger, frustration or aggression without you realising it and can affect the behaviour of the customer who reacts to what they perceive the message to be.

1.3.5

The customer service deliverer's own personal presentation, approach and attitude will influence the customer's perception of the service delivered. If the customer expects to see staff in uniform who make a friendly approach and have a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears not to care.

A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you don't get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances eg being under pressure through lack of time, during busy periods.

Unit 201 / 271 Delivery of effective customer service

Outcome 4 Identify the interpersonal and team working skills required in the customer service environment

Assessment Criteria

The learner can:

- 1.4.1. Describe the skills required for effective team working
- 1.4.2. Describe how to maintain effective working relationships within a team
- 1.4.3. Describe the range of inter-personal skills required for effective customer service

Notes for Guidance

1.4.1

The skills required for effective team working include the ability to:

- be supportive
- be comfortable with disagreement and the ability to successfully overcome differences in opinion
- discuss and listen
- learn from experience, reviewing and improving performance from both successes and failures

The following phases (Bruce Tuckman) are all necessary and inevitable in order for a team to grow, to face up to challenges, to tackle problems, to find solutions, to plan work, and to deliver results and be effective. The phases are:

- Forming
- Norming
- Storming
- Performing

1.4.2

Maintaining effective working relationships requires people to:

- share workloads
- share information
- be able to work co-operatively with others
- show sensitivity to the needs and feelings of others
- work as a team to resolve customer problems and complaints
- apply teamwork to give good customer service
- work effectively with others to complete an allotted task
- respond positively to requests for help or support
- understand where and when to ask for help and support

There should always be awareness of the different personalities that could exist within a team eg introvert, confident, assertive, aggressive and withdrawn and the fact that there may be a requirement to adapt personal behaviour to the needs and feelings of team members. There will need to be an awareness of how an individual's behaviour can impact on team performance and that individuals in the team are working towards a common goal.

1.4.3

The range of interpersonal skills required for effective customer service includes:

- oral communication skills
- written communication skills
- non-verbal communication skills (body language)
- telephone skills
- questioning skills
- listening skills
- decision-making skills
- problem-solving skills
- information-gathering skills
- personal development skills
- team working skills

Unit 201 / 271 Delivery of effective customer service

Outcome 5 Identify the legislation which supports the customer service process

Assessment Criteria

The learner can:

- 1.5.1. Identify the key aspects of the legislation relating to consumer law
- 1.5.2. Identify the main principles of equal opportunities legislation in relation to providing customer service
- 1.5.3. Identify the responsibilities of the employer and employee under the Health and Safety at Work Act
- 1.5.4. Describe why it is important to respect customer and organisation confidentiality
- 1.5.5. Identify the main principles of the Data Protection Act
- 1.5.6. Identify how a code of practice or ethical standards can impact upon the activities of a service deliverer

Notes for Guidance

1.5.1

The key aspects of the legislation relating to consumer law are:

- Sale of Goods Act – The Sale of Goods Act 1979 has now been replaced by the Consumer Rights Act 2015, but you may be able to claim under it if goods you bought on or before 30 September 2015 become faulty. Supply of Goods and Services Act 1982 – involved with supplying goods or services to customers; eg work done, and products supplied by tradesmen and professionals, eg dentists, builders, plumbers, gardeners – ‘duty of care’.
- Trade Descriptions Act – must not falsely describe something for sale; must not make false claims for services, accommodation or facilities.
- Consumer Protection Act – items that customers buy must be fit for purpose and of a satisfactory quality and match the description provided when sold.
- Consumer Credit Act - protects customers when they buy or borrow on credit – gives customers a wide range of rights.
- Consumer Protection From Unfair Trading Regulations - protects consumer from unfair or misleading trading practices.
- The Consumer Rights Act covers what should happen when goods are faulty; what should happen when digital content is faulty; how services should match up to what has been agreed, and what should happen when they do not, or when they are not provided with reasonable care and skill; unfair terms in a contract;

1.5.2

The equal opportunities legislation that relates to providing customer service is: The Equality Act which is a law which protects consumers from discrimination. It means that discrimination or unfair treatment on the basis of certain personal characteristics, those being age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation is now against the law in almost all cases.

People have different needs, expectations, opportunities and responsibilities, therefore, it is important to remember that treating people fairly means recognising their differences.

1.5.3

Health and Safety at Work Act (HASWA) covers the responsibilities of employers to their employees and to customers who are on the premises. It also covers safe working practices, common risks and hazards eg slippery or uneven floors, excessive noise and/or moving parts in machinery, chemicals.

It covers responsibilities relating to (a) fire drill procedures (b) evacuation procedures (c) suspicious packages (d) terrorism procedures (e) special codes to indicate the level of threat the organisation believes they are under at any moment in time eg a government department.

1.5.4

Protecting confidential information is a business requirement, and an ethical and legal requirement. Information security means protecting information and information systems from unauthorised access, use, disclosure, disruption, modification, or destruction. Any loyalty and goodwill which exists between customers and the organisation will be lost if confidentiality, is breached.

Security and confidentiality of data is covered by legislation ie Data Protection Act. The Data Protection Act 2018 is a United Kingdom Act of Parliament which updates data protection laws in the UK. It is a national law which complements the European Union's General Data Protection Regulation (GDPR) and replaces the Data Protection Act 1998. The Data Protection Act 2018 is built around seven principles which state how personal data should be treated:

- Personal data must be fairly and lawfully processed.
- Personal data must be obtained for specified and lawful purposes.
- Personal data must be adequate, relevant and not excessive
- Personal data must be accurate and up to date.
- Personal data must not be kept for longer than is necessary
- Personal data must be processed in line with our rights. Your rights include the right to see any data held on you, and the right to correct inaccurate data.
- Personal data must be held securely. This means safe from unauthorised access (eg with usernames and passwords), but also safe from accidental loss (by making back ups).

Organisations retain 'personal information' about customers – eg account details, addresses and this information cannot be disclosed to anyone who asks for it. An organisation which handles personal information has a

duty by law to keep its customers' personal information safe and secure, whether it is stored in a manual format or electronically.

Legislation controls the use of data and not respecting customer and organisation confidentiality could result in a loss of the customer.

1.5.5

The Data Protection Act 2018 is built around seven principles which state how personal data should be treated:

- Personal data must be fairly and lawfully processed.
- Personal data must be obtained for specified and lawful purposes.
- Personal data must be adequate, relevant and not excessive
- Personal data must be accurate and up to date.
- Personal data must not be kept for longer than is necessary
- Personal data must be processed in line with our rights. Your rights include the right to see any data held on you, and the right to correct inaccurate data.
- Personal data must be held securely. This means safe from unauthorised access (eg with usernames and passwords), but also safe from accidental loss (by making back ups).

1.5.6

Trade Associations and Professional Bodies have a Code of Practice – sector code of practice - that guides members on how they should conduct their business. Most Codes of Practice include guidance on how to deal with customers. They usually cover how members should deal with complaints and customer problems, guidance to customers on how to make a complaint/follow grievance procedure.

Ethical standards influence how decisions are made when resolving customer problems and the behaviour of employees towards customers.

Organisational ethics include personal qualities such as:

- responsibility
- integrity
- honesty
- fairness
- respect
- compassion
- loyalty
- openness
- ethical leadership
- pride in reputation
- social awareness

Unit 202

Supporting the customer service environment

Level: 2
Credit value: 7
UAN: J/600/0658

Unit aim

To enable candidates to develop and apply the practical skills required to support the customer service environment.

Learning outcomes

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

1. Apply the practical skills required to deliver effective customer service
2. Demonstrate how to meet customer needs and expectations
3. Communicate effectively with customers
4. Apply customer service improvements and develop self

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 2 – 1, 5, 6, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 21, 22, 23, 31, 36, 37.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 1 – C1.1, C1.2, C1.3; Level 2 – C2.1a and 1b, C2.2
- AON Level 1 - N1.1
- ICT Level 1 – ICT1.1, ICT1.2

Assessment and grading

This unit will be assessed by:

- an assignment covering practical skills and underpinning knowledge

Unit 202

Supporting the customer service environment

Outcome 1

Apply the practical skills required to deliver effective customer service

Assessment Criteria

The learner can:

- 2.1.1 Identify the type of organisation
- 2.1.2 Identify the organisation's customers including internal and/or external and those with specific needs
- 2.1.3 Illustrate a customer service supply chain within an organisation
- 2.1.4 Maintain established customer records
- 2.1.5 Suggest a unique selling point or unique service offer for a product or service
- 2.1.6 Suggest ways of promoting a product or service to increase customer awareness
- 2.1.7 Compare the strengths and weaknesses of the promotional methods available

Notes for Guidance

2.1.1

Organisations are either in public, private or voluntary sectors.

Public sector – eg NHS organisations – surgeries, hospitals, housing departments, which are organisations that provide preventative or supportive services where money is not the goal.

Private/commercial sector is where an organisation is motivated by profit and money and is usually accountable to shareholders eg the retail sector – where the motivation is to increase profit, attract new customers and build on existing relationships.

Voluntary/not-for profit organisation - eg a charity or an arts organisation. This type of organisation may still sell goods and services.

2.1.2

A customer can be an individual or an organisation who receives customer service from a service deliverer. Customers can be internal eg from another part of the same organisation or colleagues; external eg individuals; businesses including suppliers.

The candidate should be able to identify the chosen organisation's customers, whether they are internal and/or external and those who require special assistance for example those who have specific needs eg health, language, age, cultural needs or who have specific learning difficulties.

2.1.3

It is essential to know who the people are in the organisation that contribute to the delivery of customer service. In a larger organisation, it may be like a family tree – people and departments or different parts of the business that have connections to one another. In a smaller organisation, one person may take on many of the roles that are looked after by specialised departments in larger organisations. It is important to understand the roles of the people involved in the supply chain.

2.1.4

Candidates should demonstrate they can maintain existing customer records when customers:

- notify a change in personal circumstances (ie change of address)
- notify a change to a regular order
- place a new order
- complain or say 'thank-you'
- give feedback on a product or service – user evaluation
- make a warranty/guarantee claim

2.1.5

The candidate should suggest a USP (Unique Selling Point) or USO (Unique Service Offer) for a product or service. A USP is what makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines. A USO is what makes a service different or better from its competitor(s) eg 24 hour availability.

USPs and USOs are used to differentiate what products and/or services one organisation provides when compared to another.

2.1.6

The candidate should be able to suggest methods of promoting products and/or services eg

- Leaflets
- Telephone calling
- Demonstrations
- Mailshots
- Promotional videos
- Newspaper (national and local) advertisements
- Television advertisements
- Local/national radio advertisements
- Social networking sites.

2.1.7

The candidate will demonstrate they can compare the factors that influence organisations to select a range of promotional methods by identifying their strengths and weaknesses in relation to cost, market penetration, method of communication and chose the most appropriate giving reasons for the choice.

Unit 202

Supporting the customer service environment

Outcome 2

Demonstrate how to meet customer needs and expectations

Assessment Criteria

The learner can:

- 2.2.1 Identify how customers demonstrate their own individual needs and expectations
- 2.2.2 Identify customers with special requirements
- 2.2.3 Identify how to adapt methods of communication and behaviour to meet the individual needs of specified customers
- 2.2.4 Identify and use methods of checking customer satisfaction
- 2.2.5 Identify ways in which an organisation might improve its reputation

Notes for Guidance

2.2.1

The candidate will be able to identify how customers demonstrate their own individual needs and expectations identifying the service customers think they ought to have. They should also understand how expectations are formed by what people hear and see, what customers read in advertisements, catalogues, brochures, etc; what happens during the customer experience and what has happened to them in other customer service experiences.

2.2.2

Some customers have special requirements eg are angry, confused, hearing impaired, mobility impaired, sight impaired and these special requirements should be identified and their needs and expectations addressed.

2.2.3

The candidate should identify how they can adapt methods of communication and their behaviour to meet the individual needs of a range of customers eg those with language difficulties, health issues, different age groups, cultural differences, those with learning difficulties. It is necessary to communicate in a clear, polite and confident way eg where there are language difficulties it may require the service deliverer to talk slowly, clearly and without the use of jargon. The service deliverer should recognise they need to treat the customer with respect at all times and work with the individual to meet their needs.

2.2.4

The candidate should identify that there are various ways of checking customer satisfaction through informal feedback eg asking the customers or noting feedback given by customers or through formal feedback eg questionnaires or surveys. Customer satisfaction could be checked and compared by sales figures and complaint records.

2.2.5

Building a strong reputation leads to customer loyalty. Having a poor reputation leads to loss of business and a downturn in profits. A strong reputation means that an organisation has to attract customers to use its products or services, resolve problems, create a positive impression and change its reputation over time. To improve its reputation an organisation has to listen to its customers and meet their needs and expectations.

Unit 202

Supporting the customer service environment

Outcome 3

Communicate effectively with customers

Assessment Criteria

The learner can:

- 2.3.1 Use different methods of communication
- 2.3.2 Identify the interpersonal skills which are required for effective team-working
- 2.3.3 Describe how to adapt own behaviour to meet the individual needs of the team
- 2.3.4 Use the telephone system efficiently and effectively
- 2.3.5 Identify the personal qualities required to deal with customer problems
- 2.3.6 Describe the skills required to deal with potentially stressful situations
- 2.3.7 Apply problem solving theories to resolving a customer service problem
- 2.3.8 Identify the process of solving a customer problem or complaint

Notes for Guidance

2.3.1

Different methods of communication used in organisations eg

- Face-to-face
- Written communication eg letter, email, instant chat
- Telephone and text.

The candidate will be required to use some or all of the different methods of communication effectively.

Face-to-face – is using regular eye contact and active listening. Eye contact may differ across cultures; ‘active listening is about head nodding, gestures and repeating back phrases that are heard to confirm understanding.

Written communication is eg letter, email, memos, reports and instant chat. There will be guidelines on when and how to use written communication eg house styles, language to be used. Written communication may be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, or if they are going to be on hold. Speaking clearly and slowly to allow for the possibility that reception on the ‘phone line may be poor; adapting speech to meet individual customer needs. . Telephone communication is

used when an immediate response is needed, when more detail needs to be obtained or when negotiation is necessary.

2.3.2

Maintaining effective working relationships requires people to:

- share workloads
- share information
- be able to work co-operatively with others
- show sensitivity to the needs and feelings of others
- work as a team to resolve customer problems and complaints
- apply teamwork to give good customer service
- work effectively with others to complete an allotted task
- respond positively to requests for help or support
- understand where and when to ask for help and support.

Candidates need to understand that they need to use the following interpersonal skills:

- Oral communication skills
- Written communication skills
- Non-verbal communication skills (body language)
- Questioning skills
- Listening skills
- Decision-making skills
- Problem-solving skills
- Information-gathering skills
- Personal development skills
- Team working skills

2.3.3

There should always be awareness of the different personalities that could exist within a team eg

- introvert
- confident
- assertive
- aggressive
- withdrawn

It should be recognised that there might be a requirement to adapt personal behaviour to the needs and feelings of team members. There needs to be an awareness of how an individual's behaviour can impact on team performance and that those individuals in the team may be working towards a common goal.

The candidate should consider they may need to be:

- Supportive
- Comfortable with disagreement and the ability to successfully overcome differences in opinion
- Able to discuss and listen
- Able to learn from experience, reviewing and improving performance from both successes and failures

2.3.4

When making a telephone call the candidate should realise the importance of:

- making focused phone calls to customers
- preparing for the call
- checking to see if the call is to an existing customer or new or potential customer
- knowing the organisation's guidelines and procedures for what should be said (which is particularly relevant if the organisation is a call centre where there may be a script)
- ensuring that equipment is available – pen and paper for notes, specific information etc.

When receiving 'phone calls from customer's an organisation's guidelines will dictate:

- how to greet the customer
- the stages of greeting
- answering within given rings
- identifying and selecting the options available to respond to the customer.

The candidate should appreciate:

- the importance of using the telephone system effectively
- being able to operate the equipment efficiently and effectively
- making sure customers are regularly informed of own actions when accessing information to provide appropriate responses if customers are going to be on hold.

It is important to:

- recognise the need to speak clearly and slowly to allow for the possibility that reception on the 'phone line may be poor
- adapt own speech to meet individual needs of customer, particularly when responding to a customers' problem
- always remember the effects of 'smiling on the 'phone', particularly when dealing with a problem or complaint from a customer.

2.3.5

The necessary qualities for dealing with customer problems are:

- Tact
- Good communication and listening skills
- Ability to gather information
- Problem solving skills
- Ability to work with others

2.3.6

Good communication, listening skills, problem solving skills as well as tact and the ability to remain calm are essential for dealing with potentially stressful situations.

To resolve a potentially stressful situation the candidate needs to:

- focus attention on the customer
- listen to the customer carefully and confirm that the problem has been clearly understood
- ask the customer appropriate questions
- don't overload the questioning and ask one question at a time
- wait for the customer to answer
- listen actively and express empathy
- use non verbal cues (eg nodding the head)
- remain calm
- share problems where necessary within the team.

2.3.7

To solve customer service problems the candidate can work with others or on their own in order to:

- understand the problem
- identify the cause
- discuss possible solutions
- solve the problem, removing negative emotions.

2.3.8

Organisations have recognised systems and procedures for solving and dealing with customer problems and complaints.

- To resolve a problem it is essential to understand the problem; it is necessary to listen to the customer carefully and to make checks that the problem has been clearly understood; make sure the team is aware of problems and share the customer feedback with the team.
- Pick the most appropriate solution to resolve the problem by working with others to identify and confirm the options available to resolve the customer service problem and within the organisational guidelines. If it is not possible to think of a solution to the problem, it may be necessary to consider alternatives.
- Ensuring the options for resolving the customer problem/complaint are discussed/communicated with the customer with a view to seeking their agreement to the proposed solution.
- Strategies to deal with complaints – reacting to possible anger from customer face-to face, on the phone, in writing; avoiding conflict; keep your customers by taking the HEAT (Hear, Empathise , Apologise, Take Ownership).

Unit 202

Supporting the customer service environment

Outcome 4

Apply customer service improvements and develop self

Assessment Criteria

The learner can:

- 2.4.1 Devise a method for obtaining customer feedback
- 2.4.2 Identify why it is important to give a positive impression to customers about changes made to customer service procedures
- 2.4.3 Identify how own behaviour might affect the behaviour of others
- 2.4.4 Identify how to obtain useful and constructive feedback from others about own performance
- 2.4.5 Identify own strengths and weaknesses in relation to working within a customer service role
- 2.4.6 Apply the techniques of self assessment to look at strengths and weaknesses
- 2.4.7 Produce a Training Needs Analysis (TNA) for self
- 2.4.8 Prepare an individual learning/development plan which could be used as a basis for discussion with a relevant person, eg tutor, line manager, HR, training department

Notes for Guidance

2.4.1

The candidate should recognise that there is formal and informal feedback. A customer service deliverer has a responsibility for gathering spontaneous customer feedback (informal) eg spontaneous remarks or comments, either verbal or in writing, made by customers without being asked.

Organisations may also have formal methods of gathering customer feedback eg questionnaires, surveys, service calls.

The candidate will be required to devise a method for obtaining customer feedback which will be appropriate for the needs of the organisation.

2.4.2

There has to be confidence that the person delivering customer service knows and understands the features and benefits of the products or services. In order to sustain a long-term relationship with a customer – a repeat customer – it is essential to build on the customer's confidence in the service offered. A customer's loyalty and long-term relationship rely on their being comfortable with the service and that they receive excellent customer service.

It is important for a customer service deliverer to be aware of:

- how customer feedback is obtained and how this affects the way service is delivered and influences possible change.
- how to work with others to identify and support change in the way service is delivered
- the importance of keeping product and service knowledge up-to-date.
- why it is important to give a positive impression to customers about changes made by the organisation and ensure there is effective communication to avoid customers feeling threatened by changes.
- the need for continuous improvement in delivering customer service, exploring ideas for delivery in new and innovative ways.
- the importance of involving front line staff and supporting staff in continuous improvement.

2.4.3

The customer service deliverer's own personal presentation, approach and attitude will influence the customer's perception of the service delivered. If the customer expects to see staff in uniform who have a friendly approach and a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears to not care. A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you do not get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances, eg being under pressure through lack of time or during busy periods. Being aggressive for example may cause an otherwise calm person to mirror that behaviour and become aggressive too.

2.4.4

Feedback on own performance can be formal and informal. Examples of formal feedback are appraisals, job performance review; informal could be lunch meetings, team meetings.

2.4.5

Strengths and Weaknesses – The candidate will need an understanding of the knowledge and skills required by a customer service deliverer and where they personally fit in relation to these.

The candidate should be able to identify their own strengths and development needs in relation to their customer service role. By understanding their own strengths and development needs, the candidate should be aware of how formal personal development and action planning with regular reviews of progress against objectives can assist with the development of their own inter-personal skills.

2.4.6

The candidate should apply the techniques of self assessment eg Strengths, Weaknesses, Opportunities and Threats – a SWOT analysis.

2.4.7

The candidate should produce a Training Needs Analysis (TNA). A Training/learning Needs Analysis (TNA) is a review of learning and development needs for an individual.

It considers the skills, knowledge and behaviours that people need and how to develop them effectively.

2.4.8

Personal Development/Learning Plan (PDP) – after identifying own strengths, weaknesses and development needs it is essential the candidate puts the information into one document which can be a self-assessment document. Following this the candidate should work with an appropriate person to draw up a personal development plan. It is a document that records what the candidate intends to do to improve their customer service performance. It could include personal objectives; what they intend to do; the actions they will take; details of any support and resources needed, eg time and access to information; a target date for completion.

Unit 272

Supporting the customer service environment

UAN:	F/504/1358
Level:	2
Credit value:	7
GLH:	65
Relationship to NOS:	This unit is linked to the ICS National Occupational Standards: NVQ Level 2 – 1, 5, 6, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 21, 22, 23, 31, 36, 37.
Endorsement by sector or regulatory body:	This unit is endorsed by CFA, the Sector Skills Council for Business and Administration.
Assessment:	Online multiple choice test
Aim:	To enable candidates to develop and apply the practical skills required to support the customer service environment.

Learning outcome
The learner will: 1. Know the practical skills required to deliver effective customer service
Assessment criteria
The learner can: 1.1 Identify different types of organisation 1.2 Describe different types internal and external customers including those with specific needs 1.3 Describe what is meant by a Customer Service Supply Chain 1.4 Describe how to maintain customer records 1.5 Describe the difference between a Unique Selling Point (USP) and a Unique Service Offer (USO) 1.6 Identify ways an organisation can promote a product or service to increase customer awareness 1.7 Identify the strengths and weaknesses of different promotional methods

Learning outcome
The learner will: 2. Know how to meet customer needs and expectations
Assessment criteria
The learner can: 2.1 Identify how customers demonstrate their own individual needs and expectations

- | |
|---|
| <ul style="list-style-type: none"> 2.2 Identify customers with special requirements 2.3 Identify how methods of communication and behaviour can be adapted to meet the individual needs of customers 2.4 Identify methods of checking customer satisfaction 2.5 Identify ways in which an organisation might improve its reputation |
|---|

Learning outcome

The learner will:

- | |
|---|
| 3. Know how to communicate effectively with customers |
|---|

Assessment criteria

The learner can:

- | |
|--|
| 3.1 Describe different methods of communication and their use in a customer service environment |
| 3.2 Identify the interpersonal skills which are required for effective team-working |
| 3.3 Describe how the individual can adapt their own behaviour to meet the needs of the team |
| 3.4 Describe the techniques required for achieving effective and efficient telephone communication |
| 3.5 Identify the personal qualities required to deal with customer problems |
| 3.6 Describe the skills required to deal with potentially stressful situations |
| 3.7 Identify the importance of dealing with customer service problems promptly |
| 3.8 Identify the process of solving a customer problem or complaint |

Learning outcome

The learner will:

- | |
|--|
| 4. Understand how to improve customer service and develop self |
|--|

Assessment criteria

The learner can:

- | |
|---|
| 4.1 Describe methods an organisation can use to obtain customer feedback |
| 4.2 Identify why it is important to give a positive impression to customers about changes made to customer service procedures |
| 4.3 Identify how an individual's behaviour might affect the behaviour of others |
| 4.4 Identify how an individual can obtain useful and constructive feedback from others about their performance |
| 4.5 Describe effective ways to review personal strengths and weaknesses in relation to working within a customer service role |
| 4.6 Describe how self-assessment can be beneficial in relation to strengths and weaknesses |
| 4.7 Explain the purpose of a Training Needs Analysis (TNA) |
| 4.8 Describe the elements of an Individual Learning/Development Plan |

Unit 272 Supporting the customer service environment

Supporting information

Guidance

Outcome 1

1.1

Organisations are either in public, private or voluntary sectors.

- a) Public sector – eg NHS organisations – surgeries, hospitals; housing departments, organisations which provide preventative or supportive services where money is not the goal
- b) Private/commercial sector – eg retail – motivation is to increase profit, attract new customers and build on existing relationships
- c) Voluntary/not-for profit organisation – eg charity – may still sell goods and services.

1.2

A customer can be an individual or an organisation and is somebody who receives customer service from a service deliverer. Customers can be **internal** eg from another part of the same organisation or colleagues; **external** eg individuals; businesses including suppliers.

The candidate should be able to identify the chosen organisation's customers be they internal and/or external and also those who require special assistance for example those who have specific needs eg health, language, age, cultural needs or who have specific learning difficulties.

1.3

It is essential to know who the people are in the organisation that contribute to the delivery of customer service. In a larger organisation it may be like a family tree – people and departments or different parts of the business have connections to one another. In a smaller organisation one person may have to take on many of the roles that are looked after by specialised departments in larger organisations. It is important to understand the roles of the people involved in the supply chain.

1.4

Candidates should demonstrate they can maintain existing customer records eg when customers:

- notify a change in personal circumstances (ie change of address)
- notify a change to a regular order
- place a new order
- complain or say 'thank-you'
- give feedback on a product or service – user evaluation
- make a warranty/guarantee claim

1.5

The candidate should suggest a USP (Unique Selling Point) or USO (Unique Service Offer) for a product or service. A USP is what makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines. A USO is what makes a service different or better from its competitor(s) eg 24 hour availability.

USPs and USOs are used to differentiate what one organisation provides by way of products and/or services from another.

1.6

The candidate should be able to suggest methods of promoting products and/or services eg

- Leaflets
- Telephone calling
- Demonstrations
- Mailshots
- Promotional videos
- Newspaper (national and local) advertisements
- Television advertisements
- Local/national radio advertisements
- Social networking sites

1.7

The candidate will demonstrate they can compare the factors that influence organisations to select a range of promotional methods by identifying their strengths and weaknesses in relation to cost, market penetration, method of communication and chose the most appropriate, giving reasons for the choice.

Outcome 2

2.1

The candidate will be able to identify how customers demonstrate their own individual needs and expectations identifying the service customers think they ought to have. They should also understand how expectations are formed by what people hear and see, what customers read in advertisements, catalogues, brochures, etc; what happens during the customer experience and what has happened to them in other customer service experiences.

2.2

Some customers have special requirements eg are angry, confused, hearing impaired, mobility impaired, sight impaired and these special requirements should be identified and their needs and expectations addressed.

2.3

The candidate should identify how they can adapt methods of communication and their behaviour to meet the individual needs of a range of customers eg those with language difficulties, health issues, different age groups, cultural differences, those with learning difficulties. It is always necessary to communicate in a clear, polite and confident way eg where there are language difficulties it may require that the service deliverer talks more slowly, clearly and without the use of jargon. The

service deliverer should recognise they need to treat the customer with respect at all times and work with the individual to meet their needs.

2.4

The candidate should identify that there are various ways of checking customer satisfaction through informal feedback eg asking the customers or noting feedback given by customers or through formal feedback eg questionnaires, surveys etc. Customer satisfaction could also be checked through sales figures, complaint records etc.

2.5

Building a strong reputation leads to customer loyalty. Having a poor reputation leads to loss of business and a downturn in profits. A strong reputation means that an organisation has to attract customers to use its products or services, put things right if they go wrong, create a positive impression and change its reputation over time. To improve its reputation an organisation has to listen to its customers and meet their needs and expectations.

Outcome 3

3.1

Different methods of communication are used in organisations eg

- Face-to-face
- Written communication eg letter, email
- Telephone and text
- Instant chat.

The candidate will be required to use some or all of the different methods of communication and ensure they do so effectively.

Face-to-face – is about eye contact and active listening. ‘Normal’ eye contact may differ across cultures; ‘active listening is about head nodding, gestures and repeating back phrases that are heard and confirmation of understanding.

Written communication is eg letter, email, memos and reports. There will be guidelines on when and how to use written communication eg house styles, language to be used etc. Written communication will be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, of if they are going to be on hold, etc; speaking clearly and slowly to allow for the possibility that reception on the ‘phone line may not be perfect; adapting speech to meet individual needs of customer.

Online chat is a way of communicating with customers in real-time regarding their problem or complaint. Customers can ask questions to obtain a quick response.

3.2

Maintaining effective working relationships requires people to:

- share workloads
- share information
- be able to work co-operatively with others
- show sensitivity to the needs and feelings of others

- work as a team to resolve customer problems and complaints
- apply teamwork to give good customer service
- work effectively with others to complete an allotted task
- respond positively to requests for help or support
- understand where and when to ask for help and support.

Candidates will need to understand that they will need to use the following interpersonal skills:

- Oral communication skills
- Written communication skills
- Non-verbal communication skills (body language)
- Questioning skills
- Listening skills
- Decision-making skills
- Problem-solving skills
- Information-gathering skills
- Personal development skills
- Team working skills

3.3

There should always be awareness of the different personalities that could exist within a team eg

- Introvert
- confident
- assertive
- aggressive
- withdrawn

It should also be recognised that there may be a requirement to adapt personal behaviour to the needs and feelings of team members. There will also need to be an awareness of how an individual's behaviour can impact on team performance and that those individuals in the team may be working towards a common goal.

The candidate should consider they may need to be:

- Supportive
- Comfortable with disagreement and the ability to successfully overcome differences in opinion
- Able to discuss and listen
- Able to learn from experience, reviewing and improving performance in the light of both successes and failures

3.4

When making a telephone call the candidate should realise the importance of:

- making focused phone calls to customers
- preparing for the call
- checking to see if the call is to an existing customer or a potential or new customer
- knowing the organisation's guidelines and procedures for what should be said (which is particularly relevant if the organisation is a call centre where there may be a script)

- ensuring that equipment is available – pen, paper etc for notes; specific information etc.

Also when receiving 'phone calls from customer's organisation's guidelines will dictate:

- how to greet the customer
- the stages of greeting
- answering within given rings
- identifying and selecting the options available to respond to the customer.

The candidate should appreciate:

- the importance of using the telephone system effectively
- being able to operate the equipment efficiently and effectively
- making sure customers are regularly informed about own actions when accessing information to provide appropriate responses of if customers are going to be on hold, etc.

It is also important to:

- recognise the need to speak clearly and slowly to allow for the possibility that reception on the 'phone line may not be perfect
- adapt own speech to meet individual needs of customer, particularly when responding to customers' problems
- always remembering the effects of "smiling on the 'phone", particularly when dealing with a problem or complaint from a customer

3.5

The necessary qualities for dealing with customer problems are:

- Tact
- Good communication and listening skills
- Ability to gather information
- Problem solving skills
- Ability to work with others

3.6

Good communication, listening skills, problem solving skills as well as tact and the ability to remain calm are essential for dealing with potentially stressful situations.

To resolve a potentially stressful situation the candidate needs to appreciate it is essential to:

- focus your attention on the customer
- listen to the customer carefully and to make checks that the problem has been clearly understood
- ask the customer appropriate questions
- don't overload the questioning and ask one question at a time
- wait for the customer to answer
- listen actively and express empathy
- use non verbal cues (eg nodding the head)
- remain calm
- share problems where necessary within the team.

3.7

To solve customer service problems the candidate can work with others or on their own in order to:

- understand the problem
- identify the cause
- discuss possible solutions
- solve the problem, removing negative emotions.

3.8

Organisations have recognised systems and procedures for solving and dealing with customer problems and complaints.

- To resolve a problem it is essential to understand the problem; it is necessary to listen to the customer carefully and to make checks that the problem has been clearly understood; make sure the team is aware of problems and share the customer feedback with the team.
- Pick the best solution to resolve the problem by identifying the options and working with others to identify and confirm the options to resolve the customer service problem within the organisational guidelines. If it is not possible to think of a solution to the problem it may be necessary to consider alternatives.
- Ensuring the options for resolving the customer problem/complaint are discussed/communicated with the customer with a view to seeking their agreement to the proposed solution.
- Strategies to deal with complaints – reacting to possible anger from customer face-to face, on the phone, in writing, etc; avoiding conflict; keep your customers by taking the HEAT (Hear, Empathise , Apologise, Take Ownership).

Outcome 4

4.1

The candidate should recognise that there is formal and informal feedback. Each customer service deliverer has a responsibility for gathering spontaneous customer feedback (informal) eg chance remarks or comments, either verbal or in writing, made by customers without being asked.

Organisations may also have formal methods of gathering customer feedback eg questionnaires, surveys, service calls, feedback submitted online eg: product or service reviews.

The candidate will be required to devise a method for obtaining customer feedback which will be appropriate for the needs of the organisation.

4.2

There has to be confidence that the person delivering customer service knows and understands the features and benefits of the products or services. In order to sustain a long-term relationship with a customer – a repeat customer – it is essential to build on the customer's confidence in the service offered. A customer's loyalty and long-term relationship rely on their being comfortable with the service and that they receive excellent customer service.

It is important for a customer service deliverer to be aware of:

- how customer feedback is obtained and how this affects the way service is delivered and influences possible change.
- how to work with others to identify and support change in the way service is delivered
- the importance of keeping product and service knowledge up-to-date.
- why it is important to give a positive impression to customers about changes made by the organisation and ensure there is effective communication to avoid customers feeling threatened by changes.
- the need for continuous improvement in delivering customer service, exploring ideas for delivery in new and innovative ways.
- the importance of involving front line staff and supporting staff in continuous improvement.

4.3

The customer service deliverer's own personal presentation, approach and attitude will influence the customer's perception of the service delivered. If the customer expects to see staff in uniform who have a friendly approach and a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears to not care. A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you do not get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances, eg being under pressure through lack of time or during busy periods. Being aggressive for example may cause an otherwise calm person to mirror that behaviour and become aggressive too.

4.4

Feedback on own performance can be formal and informal. Examples of formal feedback are appraisals, job performance review; informal could be lunch meetings, team meetings.

4.5

Strengths and Weaknesses – The candidate will need an understanding of the knowledge and skills required by a customer service deliverer and where they personally fit in relation to these.

The candidate should be able to identify their own strengths and development needs in relation to their customer service role. By understanding their own strengths and development needs, the candidate should be aware of how formal personal development and action planning with regular reviews of progress against objectives can assist with the development of their own inter-personal skills.

4.6

The candidate should apply the techniques of self assessment eg Strengths, Weaknesses, Opportunities and Threats – a SWOT analysis.

4.7

The candidate should produce a Training Needs Analysis (TNA). A Training/learning Needs Analysis (TNA) is a review of learning and development needs for an individual.

It considers the skills, knowledge and behaviours that people need and how to develop them effectively.

4.8

Personal Development/Learning Plan (PDP) – after identifying own strengths, weaknesses and development needs it is essential the candidate puts the information into one document which can be a self-assessment document. Following this the candidate should work with an appropriate person to draw up a personal development plan. It is a document that records what the candidate intends to do to improve their customer service performance. It could include personal objectives; what they intend to do; the actions they will take; details of any support and resources needed, eg time and access to information; a target date for completion.

Unit 301 / 371 Principles of customer service delivery

Level: 3
Credit value: 6
UAN: L/600/0659

Unit aim

To enable the candidate to understand how customer service delivery and legislation affects customer expectations.

Learning outcomes

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

1. Describe the principles which impact on customer expectations
2. Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction
3. Describe solutions to customer service problems and complaints within organisational constraints
4. Explain how legislation affects the customer service process

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 3 – 301.1.4/9/10/11/12, 301.2.1/5, 301 ku 7, 302. 2.1/2/3/4/5, 302 ku 7-11.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 2 – C2.1, C 2.2, C2.3; Level 3 – C3.1a and 1b, C3.2
- AON Level 1 – N/A
- ICT Level 2 – ICT2.1, ICT2.2

Assessment and grading

This unit will be assessed by:

- an assignment covering practical skills and underpinning knowledge
or an online test

Unit 301 / 371 Principles of customer service delivery

Outcome 1 Describe the principles which impact on customer expectations

Assessment Criteria

The learner can:

- 1.1.1 Identify the differences in working in a customer service role within different sectors
- 1.1.2 Explain what is meant by customer expectations and how these are formed
- 1.1.3 Describe how to balance the needs and expectations of the customer with those of the organisation

Notes for Guidance

1.1.1

The sectors are public, private or voluntary and it is important to understand the similarities and differences in planning customer service offers in each sector.

Public sector – eg NHS organisations – surgeries, hospitals, housing departments, which are organisations that provide preventative or supportive services where money is not the goal. As with all organisations, the service provided by a public sector body must be supplied within a set budget.

Private/commercial sector is where an organisation is motivated by profit and money and is usually accountable to shareholders eg the retail sector – where the motivation is to increase profit, attract new customers and build on existing relationships.

Voluntary/not-for profit organisation - eg a charity or an arts organisation. This type of organisation may still sell goods and services where the income will be used to achieve the goals of the organisation but it does not have shareholders or owners and is not profit motivated. It aims to achieve and often exists to better the lives of others and offer support networks.

1.1.2

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service.

Expectations are formed:

- through what customers hear and see
- what they read and the messages the organisation sends (ie via its reputation and brand)
- by what actually happens to them when dealing now and in the past with an organisation

Customer expectations are heavily influenced by word of mouth (eg friends and family) and the media. Customers may have experiences with similar organisations that impact upon their overall impression and expectations of that particular service industry eg hotels and restaurants, supermarkets, banking, insurance.

1.1.3

The candidate should understand customer service is not just about saying 'yes' to customers. It is necessary to balance the needs of the customer and the organisation. This may involve them influencing the customer and negotiating with the customer in order to reach agreement. The candidate should be able to describe how to explain to a customer their needs and expectations cannot be met.

Unit 301 / 371 Principles of customer service delivery

Outcome 2 Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction

Assessment Criteria

The learner can:

- 1.2.1. Describe how the individual's and the customer's behaviours affect expectations
- 1.2.2. Identify and use different methods of communication to meet a range of customer expectations
- 1.2.3. Identify different types of non verbal communication and their impact
- 1.2.4. Explain the interpersonal skills which can be used to achieve customer satisfaction
- 1.2.5. Identify possible barriers to effective communication

Notes for Guidance

1.2.1

Different behaviours in a range of customers will require a service deliverer to adapt their own behaviour eg when dealing with:

- aggressive behaviour
- confused behaviour
- people who are upset
- frustrated
- worried
- people with special needs
- cultural needs

Producing positive behaviours in turn produces positive attitudes, it is important that negative feelings are not displayed. By adapting body language one can achieve customer satisfaction. Negative behaviour on the part of the service provider can affect the customer satisfaction and mean their expectations have not been met.

Each customer transaction impacts upon longer term customer service relationships. Misunderstanding behaviour and making assumptions potentially leads to customer dissatisfaction and mixed communication.

1.2.2

The most effective methods of communication are eg:

- face-to-face
- written communication eg letter, email
- telephone and text
- online chat

Face-to-face – is using regular eye contact and active listening. Eye contact may differ across cultures; 'active listening is about head nodding, gestures and repeating back phrases that are heard to confirm understanding, so that customers feel the service provider is giving full attention.

Written communication is eg letter, email, memos and reports. There will be guidelines on when and how to use written communication eg house styles, language to be used. Written communication may be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, or if they are going to be on hold. Speaking clearly and slowly to allow for the possibility that reception on the 'phone line may be poor; adapting speech to meet individual customer needs. Telephone communication is used when an immediate response is needed, when more detail needs to be obtained or when negotiation is necessary.

Online chat is a way of communicating with customers in real-time regarding their problem or complaint. Customers can ask questions to obtain a quick response.

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Expectations are formed:

- through what customers hear and see
- what they read and the messages the organisation sends (ie via its reputation and brand)
- what actually happens to them when dealing now, and what has happened in the past, with an organisation.

Customer expectations are also heavily influenced by word of mouth (eg friends and family) and the media. It is important to use the correct method of communication so that the customer is communicated with in a way that they would expect.

1.2.3

Body language including:

- smiling
- posture
- folded arms

It is important to realise that verbal communication can be affected by non verbal ie the spoken word, can be enhanced by body language for eg

a word of congratulation can be enhanced by a handshake and a smile; or it could be that words of encouragement are not matched by the body language eg when told work is good but the body language is negative with no smile, folded arms and an aggressive stance.

1.2.4

A variety of interpersonal skills which can be used to achieve customer satisfaction include:

- Listening skills
- Body language
- Assertiveness
- Appropriate use of language
- Eye contact
- Questioning techniques
- Personal presentation.

1.2.5

Barriers to effective communication include:

- Poor listening skills
- Language problems
- Lack of communication
- Lack of discussion
- Misunderstandings
- Technology breakdowns
- Environmental constraints

There are various obstacles which may impact upon effective communication eg poor listening skills where the individual hears words but doesn't listen to the content and meaning; language problems which may not necessarily be where the language is different but where the individual has speech problems or a strong accent; lack of communication of essential information; lack of discussion between parties. Where there are language problems there could be misunderstandings or just no understanding of what is being said. Technology breakdowns can also increasingly now cause communication problems.

Unit 301 / 371 Principles of customer service delivery

Outcome 3 Describe solutions to customer service problems and complaints within organisational constraints

Assessment Criteria

The learner can:

- 1.3.1. Describe techniques for dealing with customer service problems or complaints
- 1.3.2. Describe the factors that need to be considered when finding a solution to a customer service problem
- 1.3.3. Identify solutions to customer problems and complaints
- 1.3.4. Explain why a complaint should be viewed in a positive manner
- 1.3.5. Describe how the use of record keeping systems help manage and support the customer service process

Notes for Guidance

1.3.1

To deal with problems or complaints an understanding of the problem solving cycle is necessary:

- understanding the problem
- identifying the cause
- discussing the solution
- solving the problem

The candidate should understand the techniques for dealing with customers who have problems or who have complained and who have a variety of expectations as a result eg

- using calming techniques
- effective listening
- diffusing negative emotions
- assertiveness skills
- negotiation

1.3.2

Factors to be considered when finding a solution to a customer service problem include:

- picking the best solution within the organisation's guidelines to resolve the problem
- the cost to the organisation
- trying to meet the customer's needs and expectations
- the time it takes to find the solution

Consider the strategies to deal with complaints – avoid reacting to possible customer anger whether face-to face, on the 'phone or in writing; avoid conflict; keep customers by using the HEAT approach (Hear, Empathise, Apologise, Take Ownership).

Analysis of customer service problems and complaints should be used to identify areas for action and improvement. Any areas for improvement/action should take into account the benefits of change to customers, the organisation and employees.

1.3.3

Candidates should be able to show they can analyse problems and complaints and their causes and find solutions.

To solve the problem or complaint the candidate will need to understand the problem or complaint and work with the customer to find a solution. This may not always be possible and this is when negotiation will be necessary. Deliverers of customer service have to be aware of their own authority when solving customer service problems and the factors which limit their authority to act eg financial, organisational policies, legal, resources.

1.3.4

Complaints should be viewed in a positive manner as they provide early warning signals and an opportunity to improve the customer relationship and the service given.

1.3.5

Organisations have record keeping systems to help support and manage the customer services process.

The records retained may include:

- personal data – customer's name, address, account details, previous purchases
- customer feedback on a product or service – user evaluation; warranty/guarantee records
- records of complaints.

Records of complaints can show the need to make improvements while data held on customers can be used to contact them about new products.

Unit 301 / 371 Principles of customer service delivery

Outcome 4 Explain how legislation affects the customer service process

Assessment Criteria

The learner can:

- 1.4.1. Identify and explain how relevant legislation affects the customer service process
- 1.4.2. Identify and explain the relevant legislation relating to customer record keeping and its implications
- 1.4.3. Explain the importance of maintaining security and confidentiality of data
- 1.4.4. Define different forms of contracts and describe what makes a contract binding
- 1.4.5. Explain the purpose of codes of practice and describe their relationship to customer service

Notes for Guidance

1.4.1

Organisations have a range of contractual duties and statutory duties which affect the way products or services can be delivered and which affect how customers are treated.

The relevant legislation which affects the customer service process are eg

- Sale of Goods Act – The Sale of Goods Act 1979 has now been replaced by the Consumer Rights Act 2015, but you may be able to claim under it if goods you bought on or before 30 September 2015 become faulty.
- Supply of Goods and Services Act – only applies to contracts entered into before 1 October 2015. This has been replaced by the Consumer Rights Act which gives you rights if something goes wrong with a service you pay for.
- Trade Descriptions Act – must not falsely describe something for sale; must not make false claims for services, accommodation or facilities.
- Consumer Protection Act – items that customers buy must be fit for purpose and of a satisfactory quality and match the description provided when sold.
- Consumer Credit Act - protects customers when they buy or borrow on credit – gives customers a wide range of rights.
- Consumer Protection From Unfair Trading Regulations - protects consumer from unfair or misleading trading practices.
- The Consumer Rights Act covers what should happen when goods are faulty; what should happen when digital content is faulty; how services should match up to what has been agreed, and what should happen when they do not, or when they are not provided with reasonable care and skill; unfair terms in a contract;

The equal opportunities legislation that relates to providing customer service is the Equality Act a law which protects consumers from discrimination. It means that discrimination or unfair treatment on the basis of certain personal characteristics, those being age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation is now against the law in almost all cases.

Health and Safety at Work Act (HASWA) 1974 covers the responsibilities of employers to their employees and also to customers who are on the premises. It ensures that safe working practices are in place and common risks and hazards eg slippery or uneven floors, excessive noise and/or moving parts in machinery, chemicals are dealt with.

Finally, legislation exists that controls the use of data and ensures organisations and their staff always respect customer and organisation confidentiality as lack of confidentiality could result in a loss of the customer. This legislation is the Data Protection Act.

1.4.2

The Data Protection Act is the legislation that covers the retention of data.

The Data Protection Act 2018 is built around seven principles which state how personal data should be treated:

- Personal data must be fairly and lawfully processed.
- Personal data must be obtained for specified and lawful purposes.
- Personal data must be adequate, relevant and not excessive
- Personal data must be accurate and up to date.
- Personal data must not be kept for longer than is necessary
- Personal data must be processed in line with our rights. Your rights include the right to see any data held on you, and the right to correct inaccurate data.
- Personal data must be held securely. This means safe from unauthorised access (eg with usernames and passwords), but also safe from accidental loss (by making back ups).

The potential impact on recordkeeping is that organisations are required to have their own guidelines for maintaining the security and confidentiality of data and to ensure they are adhered to. Records should always be accurate and kept up to date. Organisations need to be aware that appropriate measures can be taken when there is unauthorised or unlawful processing of personal data.

1.4.3

It is important to maintain the security and confidentiality of data to comply with the Data Protection Act. Maintaining security and confidentiality of data is a business requirement and in many cases an ethical and legal requirement.

Any loyalty and goodwill between customers and organisations could be lost if confidentiality is breached. The organisation could also be prosecuted for breaking the law.

1.4.4

There are various types of contract eg verbal, written, service level agreements, memorandum of understanding.

A Service Level Agreement (SLA) is a formally negotiated agreement between two parties. It is a contract that exists between customers and their service providers, their client or between service providers.

A memorandum of understanding is most often used in cases where parties either do not imply a legal commitment or in situations where the parties cannot create a legally enforceable agreement. It is a more formal alternative to a gentleman's agreement.

A contract is an agreement (either verbal or written) between two or more persons ie individuals, businesses etc to do (or to not do) something in exchange for something of value. The terms of the contract detail the binding promises of each party to the contract ie who, where, what, when, how.

1.4.5

A Code of Practice is generally produced by Trade Associations and Professional Bodies and guide member organisations on how they should conduct their business. Most include guidance on how to deal with customers and usually cover how members should deal with complaints and customer problems; guidance for customers on how to make a complaint/follow grievance procedure.

Unit 302

Developing and improving the customer service process

Level: 3
Credit value: 7
UAN: F/600/0660

Unit aim

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

Learning outcomes

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

1. Explain how customer feedback can improve the customer service process
2. Describe the process of promoting products and services
3. Explain the importance of effective teamwork and the monitoring of performance

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 3 –301.1.1/4/5/8/9/11/12/14, 301.2.2/4/5 KU 3/5/6/8, 302 KU 1/2/4/5/6.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 2 – C2.1, C2.2, C2.3; Level 3 – C3.1a and 1b, C3.2
- AON Level 1 – N1.1, N1.2 and N1.3
- ICT Level 2 – ICT2.1, ICT2.2

Assessment and grading

This unit will be assessed by:

- an assignment covering practical skills and underpinning knowledge

Unit 302 Developing and improving the customer service process

Outcome 1 Explain how customer feedback can improve the customer service process

Assessment Criteria

The learner can:

- 2.1.1 Describe the benefits of evaluating the customer service experience
- 2.1.2 Describe and compare a range of techniques used in monitoring customer service delivery
- 2.1.3 Design a method of obtaining customer feedback
- 2.1.4 Explain how the outcome of an organisational SWOT analysis can be used to promote a cycle of continuous improvement
- 2.1.5 Explain the techniques used to monitor and review the impact of any changes introduced in an organisation to customers, employees and the organisation

Notes for Guidance

2.1.1

The evaluation of any customer service process benefits organisations because:

- good customer service is vital for the survival of an organisation
- excellent customer service can make an organisation more successful than its competitors
- they can check customer needs and expectations are being met
- they can act upon the evaluation and make improvements

2.1.2

A range of techniques can be used to monitor customer service delivery eg:

- Any feedback collected, recorded and analysed contributes towards continuous customer service improvement. Customer feedback can be collected using a range of methods eg informal - asking questions verbally during discussion either face-to-face or on the telephone; recording unsolicited customer comments; spontaneous customer feedback or formal -, formal interviews, one to one, or in a group; written questionnaires; focus groups; street surveys; telephone surveys; direct mailings; mystery shoppers; suggestion boxes, feedback submitted online eg: product or service reviews.
- The effectiveness of each would depend on the situation it was used in. Cost and percentage of response for example would have to be considered.
- Analysis of records can help to identify trends in customer service delivery. These can be records of sales, results from advertising etc.

These trends might link to a need for process improvement or they might suggest individuals' performance needs addressing

- Record keeping system for customer complaints, feedback on products, purchase trends can also be used to monitor customer service delivery eg a drop in sales may indicate the customer service offered is not meeting expectations. However, this would need to be backed by eg a customer survey as the fall in sales may be due to the product being unpopular rather than poor customer service.

2.1.3

Methods available to obtain customer feedback are eg:

- asking questions (verbally, face-to-face or on the 'phone)
- formal interviews, 1:1 or in a group
- written questionnaires
- street surveys
- telephone surveys
- direct mailings
- service calls
- feedback submitted online eg: product or service reviews.

Formal feedback is where set questions are asked to find out specific detail while informal feedback tends to be spontaneous and while useful information can be obtained it is not gathering data on specifics.

Formal methods of gathering feedback can be aimed at a specific group of customers and will be structured to ensure it gathers the feedback required.

2.1.4

A SWOT analysis considers the strengths, weaknesses, opportunities and threats of an organisation.

A SWOT analysis groups key pieces of information into two main categories:

- Internal factors – The strengths and weaknesses internal to the organisation
- External factors – The opportunities and threats presented by the external environment to the organisation.

Through the use of a SWOT analysis the key internal and external factors that are important to achieving an objective can therefore be identified. The final outcome of the SWOT analysis allows an organisation to assess whether or not it is successful, whether a project can work or an objective be met and where changes should be made. An organisation can use the SWOT to continually assess its success (or otherwise) and decide what is working and what isn't, what is affecting them as an organisation and what the threats are and make improvements/ changes as required and then evaluate whether these have worked.

2.1.5

An organisation should be able to analyse the impact of any change through customer feedback obtained from different sources, eg observation, questionnaires, reduction in complaints etc.

Any change should be monitored and reviewed. Any monitoring or review must consider the impact the change has had on customers, employees, the organisation and further improvements may be needed before a change can be deemed successful.

Unit 302

Developing and improving the customer service process

Outcome 2

Describe the process of promoting products and services

Assessment Criteria

The learner can:

- 2.2.1 Explain how Unique Selling Points (USP) can influence the customer choice of products and services
- 2.2.2 Define what a Unique Service Offer (USO) is and how it is used to differentiate service offers from that of competitors
- 2.2.3 Explain how organisations promote their products and services
- 2.2.4 Describe how cost benefit analysis would influence the method used to promote a product or service
- 2.2.5 Describe the importance of evaluating promotions

Notes for Guidance

2.2.1

A Unique Selling Point or Proposition (USP) defines an organisation's competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing, influencing the customer's choice of products and services.

2.2.2

A Unique Service Offer (USO) is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers choose to conduct business with organisations.

2.2.3

Many methods of promotion are available to organisations eg advertising, word of mouth, print media such as local and national papers, telesales, TV, radio and other advertising campaigns, social media networks. Organisations will use techniques such as selling benefits and features to promote their product/ services to customers.

2.2.4

Cost-benefit analysis is a term that refers to the process involved in weighing the total expected costs against the total expected benefits of one or more actions in order to choose the best or most profitable option. This means that the cost of any promotion method will be weighed against the likely benefits before a decision is made on the best or most cost effective one.

2.2.5

It is important to evaluate promotions to assess the impact of a promotional campaign on an organisation's ability to increase market share and/or customer satisfaction and to ensure there has been value for money.

Unit 302

Developing and improving the customer service process

Outcome 3

Explain the importance of effective teamwork and the monitoring of performance

Assessment Criteria

The learner can:

- 2.3.1 Identify different communication techniques used when managing a team
- 2.3.2 Describe the inter-personal skills required for effective team working
- 2.3.3 Explain the importance of effective service partnerships for the delivery of excellent customer service
- 2.3.4 Explain the dynamics of team working
- 2.3.5 Explain why it is important to agree set goals with team members
- 2.3.6 Explain the methods used by organisations to set levels of customer service performance
- 2.3.7 Identify methods for monitoring the performance of individual and teams
- 2.3.8 Explain how team members can self-assess and develop their customer service skills and knowledge
- 2.3.9 Complete a personal development plan

Notes for Guidance

2.3.1

When managing a team use of the correct method of communication is vital.

There are a number of ways in which a team can be communicated with eg:

- Team briefing – a team briefing allows management to inform staff on subjects that are important, give an explanation on a regular basis.
- One to one communication which allows the two parties to ask questions and ensure understanding. Good face to face communication allows immediate feedback on what the person is hearing and understanding or not hearing and understanding. It also allows those communicating to adapt their technique to meet the situation.
- Emails and memos which allow quick and regular communication often to large groups ensuring a consistent message is put across.

Good communication with a team requires that it is managed and timed. Poor team management will occur if the team is not given the correct information at the correct time. Good team management is ensuring communication is planned, with clear intention. It is important that the communication is presented in a direct and clear language.

2.3.2

A range of interpersonal skills can be used to maintain effective team working eg:

- oral communication skills
- written communication skills
- non-verbal communication skills (body language)
- telephone skills
- questioning skills
- listening skills
- decision-making skills
- problem-solving skills
- information-gathering skills
- personal development skills.

It is necessary at times to adapt eg

- body language to suit the situation for example when trying to motivate
- problem solving skills where for example it is necessary to work with others to reach a solution instead of working in isolation

For effective team working, oral communication skills are very important to ensure there is clear communication with the others in the team.

2.3.3

A service partnership can be formed between two organisations or two departments of the same organisation in order to provide more effective customer service.

The service partnership model encourages service teamwork and co-operation rather than identifying one party as the internal customer of the other. For a service partnership all those involved in the delivery of a product or service must work together. If one person, department or organisation does not work as part of the team there will be a 'break' in the partnership and so the flow of effective and reliable customer service can fail.

2.3.4

All team members should be made aware of organisational goals and guidelines and how to access them. The team has to fit in with other parts of the organisation. Each team should have clear objectives that are linked to the overall organisation objectives. This is likely to mean meetings with other teams, sections or departments to understand other teams' roles. A team may be only two people working together, but the principles of good communication skills and an open approach to people and ideas are the same.

Team dynamics are the unseen forces that operate in a team between different people or groups. Personality styles, job roles, organisational culture, technology, procedures, office layout can all affect the dynamics of a team.

2.3.5

A team requires a team leader to have good listening and questioning skills and the ability to develop these skills in team members. The team leader needs to agree and set goals with team members and know exactly what the team is expected to achieve. Without this knowledge and leadership the team is likely to find difficulties in working together as a group to achieve common goals.

2.3.6

Levels of performance are set by eg:

- Key Performance Indicators (KPI) - they can help an organisation define and measure progress toward organisational goals. They could be sales targets, number of complaints etc.
- Service Level Agreements (SLA) - a contract that exists between customers and their service provider, or between service providers. It records the common understanding about services, priorities, responsibilities, guarantee, and such, collectively states the level of service. The service offer sets the basis on which the organisation will provide a service to its customers. Customers will know this is what they can expect while organisations know what they must deliver.
- Customer charter – is the organisation's statement about the level of service they will offer eg some customer charters will set out how they will compensate a customer when customer service has not been delivered in line with the charter; or it will clearly stated the timescales for responses.

These are the levels of performance that must be known and worked towards by all those in an organisation to ensure the level of customer service expected is delivered.

2.3.7

The methods of assessing and monitoring individual and team performance include eg observation, psychometric testing, training needs analysis (TNA), feedback, questioning, one- to- one meeting. The appropriateness of the method used will need to be considered eg cost implications, interpersonal problems, time, and access to resources.

Additionally it is possible to benchmark achievement against targets, SLA, industry codes of practice, NOS (National Occupational Standards), KPIs and monitor achievement

In deciding on the method to be used the advantages and disadvantages of each will need to be considered eg cost implications, time, access to resources.

2.3.8

In any team, individual team members need knowledge and skills, as defined by an appropriate role profile, to support the achievement of their own aims and objectives and those of the organisation.

To help team members assess and then plan how they can improve their customer service skills and knowledge it is essential to:

- establish the required skills and knowledge
- carry out a Training Needs Analysis on individuals
- consider individual learning styles
- consider development opportunities available

The development opportunities could include: coaching, mentoring, work-shadowing, feedback opportunities, in-house training, formal performance appraisals and e-learning.

2.3.9

A personal development plan is a tool to:

- list agreed areas for development
- list the activities to be undertaken to achieve this development
- who may assist you with this development
- when it should be achieved or reviewed
- indicate the evidence that will show achievement of the learning in your plan

Any development plan should follow SMART criteria ie be Specific, Measurable, Achievable, Realistic and Time bound.

Unit 372

Developing and improving the customer service process

UAN:	F/504/1361
Level:	3
Credit value:	7
GLH:	55
Relationship to NOS:	This unit is linked to the ICS National Occupational Standards: NVQ Level 3 – 301.1.1/4/5/8/9/11/12/14, 301.2.2/4/5 KU 3/5/6/8, 302 KU 1/2/4/5/6.
Endorsement by sector or regulatory body:	This unit is endorsed by CFA, the Sector Skills Council for Business and Administration.
Assessment:	Online multiple choice test
Aim:	To enable the candidate to understand how the customer service process can be developed and improved through customer feedback, promotion of products and services and effective teamwork.

Learning outcome
The learner will: 1. Understand how customer feedback can improve the customer service process
Assessment criteria
The learner can: 1.1 Describe the benefits of evaluating the customer service experience 1.2 Compare a range of techniques used in monitoring customer service delivery 1.3 Describe different methods an organisation can use to obtain customer feedback 1.4 Explain how the outcome of an organisational SWOT analysis can be used to promote a cycle of continuous improvement 1.5 Explain the techniques used to monitor and review the impact of any changes introduced in an organisation to customers, employees and the organisation

Learning outcome
The learner will: 2. Understand the process of promoting products and services
Assessment criteria
The learner can: 2.1 Explain how Unique Selling Points (USP) can influence the customer choice of products and services 2.2 Define what a Unique Service Offer (USO) is and how it is used to differentiate service offers from that of competitors 2.3 Explain how organisations promote their products and services 2.4 Describe how cost benefit analysis would influence the method used to promote a product or service 2.5 Describe the importance of evaluating promotions

Learning outcome
The learner will: 3. Understand the importance of effective teamwork and the monitoring of performance
Assessment criteria
The learner can: 3.1 Identify different communication techniques used when managing a team 3.2 Describe the inter-personal skills required for effective team working 3.3 Explain the importance of effective service partnerships for the delivery of excellent customer service 3.4 Explain the dynamics of team working 3.5 Explain why it is important to agree set goals with team members 3.6 Explain the methods used by organisations to set levels of customer service performance 3.7 Identify methods for monitoring the performance of individuals and teams 3.8 Explain how team members can self -assess and develop their customer service skills and knowledge 3.9 Explain the purpose of a formal development plan, both to the organisation and to the individual

Unit 372 Developing and improving the customer service process

Supporting information

Guidance

Outcome 1

1.1

The evaluation of any customer service process benefits organisations because:

- good customer service is vital for the survival of an organisation
- excellent customer service can make an organisation more successful than its competitors
- they can check customer needs and expectations are being met
- they can act upon the evaluation and make improvements

1.2

A range of techniques can be used to monitor customer service delivery eg:

- Any feedback collected, recorded and analysed contributes towards continuous customer service improvement. Customer feedback can be collected using a range of methods eg informal - asking questions verbally during discussion either face-to-face or on the telephone; recording unsolicited customer comments; spontaneous customer feedback or formal -, formal interviews, one to one, or in a group; written questionnaires; focus groups; street surveys; telephone surveys; direct mailings; mystery shoppers; suggestion boxes, feedback submitted online eg: product or service reviews . The effectiveness of each would depend on the situation it was used in. Cost and percentage of response for example would have to be considered.
- Analysis of records can help to identify trends in customer service delivery. These can be records of sales, results from advertising etc. These trends might link to a need for process improvement or they might suggest individuals' performance needs addressing
- Record keeping system for customer complaints, feedback on products, purchase trends can also be used to monitor customer service delivery eg a drop in sales may indicate the customer service offered is not meeting expectations. However, this would need to be backed by eg a customer survey as the fall in sales may be due to the product being unpopular rather than poor customer service.

1.3

The methods available to obtain customer feedback are eg:

- asking questions (verbally, face-to-face or on the 'phone)
- formal interviews, 1:1 or in a group
- written questionnaires
- street surveys
- telephone surveys
- direct mailings
- service calls
- feedback submitted online eg: product or service reviews.

Formal feedback is where set questions are asked to find out specific detail while informal feedback tends to be spontaneous and while useful information can be obtained it is not gathering data on specifics.

Formal methods of gathering feedback can be aimed at a specific group of customers and will be structured to ensure it gathers the feedback required.

1.4

A SWOT analysis considers the strengths, weaknesses, opportunities and threats of an organisation.

A SWOT analysis groups key pieces of information into two main categories:

- Internal factors – The strengths and weaknesses internal to the organisation
- External factors – The opportunities and threats presented by the external environment to the organisation.

Through the use of a SWOT analysis the key internal and external factors that are important to achieving an objective can therefore be identified. The final outcome of the SWOT analysis allows an organisation to assess whether or not it is successful, whether a project can work or an objective be met and where changes should be made. An organisation can use the SWOT to continually assess its success (or otherwise) and decide what is working and what isn't, what is affecting them as an organisation and what the threats are and make improvements/ changes as required and then evaluate whether these have worked.

1.5

An organisation should be able to analyse the impact of any change through customer feedback obtained from different sources, eg observation, questionnaires, reduction in complaints etc.

Any change should be monitored and reviewed. Any monitoring or review must consider the impact the change has had on customers, employees, the organisation and further improvements may be needed before a change can be deemed successful.

Outcome 2

2.1

A unique selling point or proposition (USP) defines an organisation's competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing thus influencing the customer's choice of products and services.

2.2

A USO (Unique Service Offer) is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers choose to do business with organisations.

2.3

Many methods of promotion are available to organisations eg advertising, word of mouth, print media such as local and national papers, telesales, TV, radio and other advertising campaigns.

Organisations will also use techniques such as selling benefits NOT features to promote their product/ services to customers.

2.4

Cost-benefit analysis is a term that refers to the process involved in weighing the total expected costs against the total expected benefits of one or more actions in order to choose the best or most profitable option. This means that the cost of any promotion method will be weighed against the likely benefits before a decision is made on the best or most cost effective one.

2.5

It is important to evaluate promotions to assess the impact of a promotional campaign on an organisation's ability to increase market share and/or customer satisfaction and to ensure there has been value for money.

Outcome 3

3.1

When managing a team use of the correct method of communication is vital.

There are a number of ways in which a team can be communicated with eg:

- Team briefing – a team briefing allows management to inform staff on subjects that are important, give an explanation on a regular basis.
 - One to one communication which allows the two parties to ask questions and ensure understanding. Good face to face communication allows immediate feedback on what the person is hearing and understanding or not hearing and understanding. It also allows those communicating to adapt their technique to meet the situation.
 - Emails and memos which allow quick and regular communication often to large groups ensuring a consistent message is put across.
- Instant chat which allows quick messages to be sent and responses between team members.

Good communication with a team requires that it is managed and timed. Poor team management will occur if the team is not given the correct information at the correct time. Good team management is about ensuring communication is planned, with clear intention. It is important that the communication is presented in a direct, simple language.

3.2

A range of interpersonal skills can be used to maintain effective team working eg oral communication skills; written communication skills; non-verbal communication skills (body language); telephone skills; questioning skills; listening skills; decision-making skills; problem-solving skills; information-gathering skills; personal development skills.

It is necessary at times to adapt eg

- body language to suit the situation for example when trying to motivate
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The development opportunities could include: coaching, mentoring, work-shadowing, feedback opportunities, in-house training, formal performance appraisals and e-learning.

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- list agreed areas for development
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Relationships to other qualifications

Links to other qualifications

NB: For qualifications, mapping to NOS should be included in each unit.

Mapping is provided as guidance and suggests areas of commonality between the qualifications. It does not imply that candidates completing units in one qualification have automatically covered all of the content of another.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

The level 2 qualification has connections to the:

- Level 2 N/SVQ in Customer Service
- Customer Service Apprenticeship

The level 3 qualification has connections to the:

- Level 3 N/SVQ in Customer Service
- Customer Service Advanced Apprenticeship

Literacy, language, numeracy and ICT skills development

Key Skills signposting

This qualification includes opportunities to develop and practise many of the underlying skills and techniques described in Part A of the standard for each Key Skills qualification. Where candidates are working towards any Key Skills alongside this qualification, they will need to be registered with City & Guilds for the Key Skills qualifications.

It should not be assumed that candidates will necessarily be competent in, or be able to produce evidence for, Key Skills at the same level as this qualification.

The 'signposts' below identify the **potential** for Key Skills portfolio evidence gathering that can be naturally incorporated into the completion of each unit. Any Key Skills evidence will need to be separately assessed and must meet the relevant standard defined in the QCA document '*Key skills qualifications standards and guidance*' (available from www.cityandguilds.com/keyskills).

Unit number/ and title	Communication	Application of Number	Information and Communication Technology
201 / 271	Level 1 C1.1, C1.2, C1.3 Level 2 C2.1 a and b, C2.2	Level 1 N1.1	Level 1 ICT1.1, ICT 1.2
202 / 272	Level 1 C1.1, C1.2, C1.3 Level 2 C2.1 a and b, C2.2	Level 1 N1.1	Level 1 ICT1.1, ICT 1.2
301 / 371	Level 2 C2.1, C2.2, C2.3 Level 3 C3.1 a and b, C3.2	N/A	Level 2 ICT2.1, ICT 2.2
302 / 372	Level 2 C2.1, C2.2, C2.3 Level 3 C3.1 a and b, C3.2	Level 1 AON 1.1, AON 1.2, AON 1.3	Level 2 ICT2.1, ICT 2.2

These qualifications can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see www.cityandguilds.com/functionalskills
- Essential Skills (Northern Ireland) – see www.cityandguilds.com/essentialskillsni
- Essential Skills Wales – see www.cityandguilds.com/esw



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**.

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

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

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

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

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

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

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

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework:** general guidance about the qualification and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

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Useful contacts

UK learners General qualification information	E: learnersupport@cityandguilds.com
International learners General qualification information	F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	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	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	F: +44 (0)20 7294 2413 E: intops@cityandguilds.com
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	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@cityandguilds.com
Publications Logbooks, Centre documents, Forms, Free literature	F: +44 (0)20 7294 2413

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As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group is a leader in global skills development. Our purpose is to help people and organisations to develop their skills for personal and economic growth. Made up of City & Guilds, City & Guilds Kineo, The Oxford Group and ILM, we work with education providers, businesses and governments in over 100 countries.

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