

SVQ1 in Customer Service at SCQF Level 4 (4427-01)

Qualification handbook for centres



www.cityandguilds.com
February 2011
Version 2.0

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City & Guilds
Skills for a brighter future



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1 Introduction

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

Qualification title and level	SVQ1 in Customer Service at SCQF Level 4
City & Guilds qualification number	4427-01
Qualification accreditation number	GA4f 21
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The level 1 City & Guilds SVQ in Customer Service qualification aims to give a basic knowledge, understanding and experience of dealing with customers in any environment or to recognise existing good practice. It will help those in a customer facing role to adopt and maintain behaviours and language appropriate to the provision of good customer service. They may go on to a customer facing role in any industry or job role or use their skills to support the service needs of a team.

Contacting the Sector Skills Body (SSB)

The Council for Administration (CFA)

Tel: 020 7091 9620

Website: www.cfa.uk.com

The Institute of Customer Service (ICS)

Tel: 01206 571 716

Fax: 01206 546 688

Website: www.instituteofcustomerservice.com

1.1 Qualification structure

To achieve the SVQ1 in Customer Service at SCQF Level 4, learners must achieve:

Minimum of 5 units of which:

Two units must be completed from **Group A: Mandatory Core Units**

One unit must be selected from **Group B: Optional Units**

One unit must be selected from **Group C: Optional Units**

One unit must be selected from **Group D: Optional Units**

The table below illustrates the unit titles and the credit value of each unit the qualification will be awarded to candidates successfully completing the required combination of units.

City & Guilds unit number	Group A Mandatory Units – Customer Service Foundations	SCQF Level	SCQF Credit
4427-101	Communicate using customer service language (F1)	4	4
4427-201	Follow the rules to deliver customer service (F2)	5	4

City & Guilds unit number	Group B Optional Units – Impression and Image	SCQF Level	SCQF Credit
4427-102	Maintain a positive and customer-friendly attitude (A1)	4	5
4427-103	Adapt your behaviour to give a good customer service impression (A2)	4	5

City & Guilds unit number	Group C Optional Units – Delivery	SCQF Level	SCQF Credit
4427-104	Do your job in a customer-friendly way (B1)	4	5
4427-212	Deliver reliable customer service (B2)	5	5
4427-213	Deliver customer service on your customer's premises (B3)	5	5
4427-214	Recognise diversity when delivering customer service (B4)	5	5
4427-215	Deal with customers across a language divide (B5)	5	8
4427-216	Use questioning techniques when delivering customer service (B6)	5	4
4427-217	Deal with customers using bespoke software (B7)	5	5
4427-218	Maintain customer service through effective hand over (B8)	5	4

City & Guilds unit number	Group D Optional Units – Handling Problems	SCQF Level	SCQF Credit
4427-105	Recognise and deal with customer queries, requests and problems (C1)	4	5
4427-106	Take details of customer service problems (C2)	4	4

1.2 Opportunities for progression

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

- Level 2 SVQ in Customer Service
- Level 2 Certificate in Customer Service
- Customer Service Apprenticeship
- SVQs in other work-related areas (for example Administration and other technical sectors)

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Generic candidate recording forms	www.cityandguilds.com
Centre guide	www.cityandguilds.com
Promotional materials	www.cityandguilds.com

2 Centre requirements

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

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 1 SVQ in Customer Service (4543) will be given automatic approval for the new Level 1 SVQ in Customer Service (4427-01). Existing sanctions will apply to the new qualifications.

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

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

Centres not yet approved by City & Guilds

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

2.1 Resource requirements

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors, internal verifiers and external verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification. They must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have a thorough knowledge of the Level 1 National Occupational Standards for Customer Service, appropriate to the Level they are working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service SVQ at the Level they are working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and SVQs at the Level they are working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

The Assessor, IV and EV working at Level 1 must have:

This can be evidenced by:

		A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 1 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓

The Assessor, IV and EV working at Level 1 must have:	This can be evidenced by:	A	IV	EV
Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the CFA		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the CFA Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	Joining the CFA	✓	✓	✓
	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service SVQs Level 1	achieving or be working towards the Level 2, 3 or 4 Customer Service SVQ	✓	✓	✓
	gathering feedback from a variety of employers and centres	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and SVQs at Level 1	curriculum vitae and references/testimonies	✓	✓	✓
	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.				
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Employer Direct Model

The CFA feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the CFA works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The organisation must:

- liaise with City & Guilds to attain approval to offer this model prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with City & Guilds
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Continuing professional development (CPD)

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

2.2 Candidate entry requirements

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

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

Wherever possible, assessment of the Customer Service National Occupational Standards should be carried out in a **real job (either paid or voluntary)**. Where this is not possible this the CFA Assessment Strategy does allow for:

Simulation

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

The use of **simulation** for the following Level 1 SVQ Units only:

- C1 Recognise and deal with customer queries, requests and problems
- C2 Take details of customer service problems

To undertake the assessment of simulated activities for these two units the following guidelines must be met:

- a. when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say;
- b. the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced;
- c. the person taking part in the simulation as a customer must be credible for the situation that is being simulated;
- d. any resources or equipment that would normally be in real work should be available and in working order for the simulation;
- e. candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work;

- f. candidates should complete the required tasks taking account of legislation and regulation that would apply in real work;
- g. candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality;
- h. whilst the primary purpose of the Simulation is for Assessment, feedback must be given in a way that builds confidence.

Realistic Working Environment (RWE)

The use of a Realistic Working Environment including work experience and work placement is allowed for all units in the Level 1 and Level 2 SVQ.

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

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

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

All other Units must be achieved in a **real working situation (either paid or voluntary)**

Age restrictions

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

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

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

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

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

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

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

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

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen www.smartscreen.co.uk
- Useful material is available from www.cfa.uk.com

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

4.2 Evidence requirements

- Evidence requirements are included as part of the unit content in this document.

4.3 Recording forms

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

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

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the CFA August 2011 and can be located on their website **www.cfa.uk.com**

5 National Occupational Standards (NOS)

Availability of units

The Customer Service units for this qualification follow.

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- unit aim

Unit 101

Communicate using customer service language (F1)

Level: 4
Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you communicate using customer service language you are able to:

1 Identify customers and their characteristics and expectations

- 1a. recognise typical customers and their expectations
- 1b. discuss customer expectations with colleagues using recognised customer service language
- 1c. follow procedures through which you and your colleagues deliver effective customer service.

2 Identify your organisation's services and products

- 2a. outline your organisation's services and products to customers
- 2b. list the information you need to deliver effective customer service and where that information can be found
- 2c. discuss with colleagues the part you play in delivering your organisation's service offer.

Knowledge and understanding

To be competent at communicating using customer service language you must know and understand:

- a. the differences between an internal customer and an external customer
- b. your organisation's services or products
- c. the connection between customer expectations and customer satisfaction in customer service
- d. why good customer service is important to any organisation
- e. why organisation procedures are important to good customer service
- f. why teamwork is central to good customer service
- g. the service offer of your organisation
- h. the part you play in delivering customer service
- i. who are your customers
- j. the main characteristics of typical customers that you deal with
- k. what impresses your customers and what annoys your customers
- l. who's who and who does what to deliver customer service in your organisation
- m. the kinds of information you need to give good service to customers
- n. how to find information about your organisation's services or products
- o. typical customer service problems in your work and who should be told about them
- p. how the way you behave affects your customer's service experience.

Unit 102

Maintain a positive and customer-friendly attitude (A1)

Level: 4

Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Your attitude and the way you behave towards customers affect customer satisfaction. Simply following procedures may not be enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. Customers like to think that you and your colleagues want to help and you can show this by being friendly and positive and giving them your complete personal attention.

Outcomes of effective performance

When you maintain a positive and customer-friendly attitude you must consistently:

1 Show the right attitude for customer service

- 1a. speak to customers clearly and put them at their ease
- 1b. recognise how customers are feeling and establish a rapport with them
- 1c. show customers that you are willing and enthusiastic at all times
- 1d. recognise that each customer is different and treat them as an individual
- 1e. show customers respect at all times and under any circumstances
- 1f. show customers that you can be relied on
- 1g. show colleagues respect at all times and under any circumstances
- 1h. show colleagues that you can be relied on.

2 Show appropriate and positive behaviours to customers

- 2a. recognise and respond when a customer wants or needs attention
- 2b. greet customers politely and positively
- 2c. focus on your customers and ignore distractions which are not important to them
- 2d. react appropriately to situations that are important enough to interrupt your work with your customer
- 2e. thank customers for the information they have given or for doing business with your organisation
- 2f. help colleagues to provide good customer service.

Knowledge and understanding

To be competent at maintaining a positive and customer-friendly attitude you must know and understand:

- a. signs that a customer gives when seeking attention
- b. what rapport looks, sounds and feels like
- c. what unimportant distractions are
- d. what is important enough to interrupt your work with a customer
- e. positive and negative body language and facial expressions
- f. that people are different and have different expectations for many reasons such as their age, culture and personality.

Unit 103

Adapt your behaviour to give a good customer service impression (A2)

Level: 4
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is all about how your behaviour affects the way your customers see you. Some of your customers expect different things from the service you offer but there are basic acceptable standards of behaviour and attitudes that you need to achieve. Your managers and supervisors also expect you to meet those standards. When you create the right impression and show a positive attitude you reduce the risk of somebody being upset or offended by the way you deal with them. This unit is appropriate for you if you have done jobs where you had limited contact with customers, you are experiencing customer service work for the first time or you are just starting your first job. If you have already successfully done full or part-time work dealing directly with customers, this may not be the right unit for you and you should consider the unit – ‘Maintain a positive and customer-friendly attitude’.

Outcomes of effective performance

When you adapt your behaviour to give a good customer service impression you must consistently:

1 Look and act the part

- 1a. dress for customer service work in the way your organisation expects
- 1b. show you are working hard and making efforts to impress customers
- 1c. be in the right place at the right time to give a good impression and deliver good customer service
- 1d. show good manners when dealing with your customers.

2 Relate to your customers and to colleagues effectively

- 2a. explain the benefits of dealing with your customers face to face or by telephone, rather than using text, e-mail or writing
- 2b. talk clearly to customers using words that they can understand
- 2c. talk to customers without using language that they would consider to be bad
- 2d. show a willing and friendly attitude when dealing with your customers without being over-familiar
- 2e. help and cooperate with colleagues to give good service to customers.

Knowledge and understanding

To be competent at adapting your behaviour to give a good customer service impression you must know and understand:

- a. how the way you dress affects the way that your customers react to the service you provide
- b. why your customers may see particular types of dress as inappropriate and how your organisation expects you to dress
- c. why it is important for customers to feel that you are working hard to give them an excellent service
- d. why good timekeeping and making sure you are where you are expected to be is important to giving excellent customer service
- e. what behaviour is considered by most customers to be “good manners” and what is considered to be “bad manners” or rudeness
- f. what customers and colleagues might consider to be bad language and why it may offend people
- g. why customers feel better about the service they receive if you have a willing and friendly attitude
- h. how to behave so that you appear to be willing and friendly with customers, without being over-familiar
- i. what you can do to cooperate with colleagues in giving customer service and why that might be helpful.

Level: 4

Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

The customer service your organisation gives is affected by the way you do your job. Whatever job you are doing, customers expect you to do it properly. They also expect you to consider their wishes and feelings while you are doing it. Doing your job properly involves following procedures and doing the tasks in your job correctly as well as having the appropriate relationship with customers. This unit covers how you do your job with your customer in mind, in a way that your organisation and supervisors find acceptable. It will help you to understand the parts of your job that are most important to good customer service.

Outcomes of effective performance

When you do your job in a customer-friendly way you must consistently:

1 Do your job in a customer-friendly way

- 1a. make a good first impression
- 1b. follow the dress code of your organisation and present the right personal image to your customers
- 1c. do the tasks that make up your job correctly and in a way that shows you know what your customers expect and what your organisation offers
- 1d. show consideration to customers when carrying out the tasks required in your job
- 1e. respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague
- 1f. share information with customers about how delivery of the product or service is going
- 1g. work flexibly to help individual customers without reducing the level of service you give to others
- 1h. share information with colleagues when they need it to provide good customer service.

Knowledge and understanding

To be competent at doing your job in a customer-friendly way you must know and understand:

- a. your organisation's dress code
- b. how to do the tasks that make up your job
- c. how long parts of the job take to do and how this may affect your customers
- d. how to do your own work in an organised way
- e. what your customers expect of you and your work
- f. the service offer that your organisation makes in your area of work and how that affects the way you do things
- g. what you are allowed to do and not allowed to do for customers
- h. how to do your job in a way that is healthy and safe for you, your customers and your colleagues.

Unit 105

Recognise and deal with customer queries, requests and problems (C1)

Level: 4
Credit value: 5

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

No matter how good you are at providing consistent and reliable customer service, some of your customers will, from time to time, expect more. They can signal this in various ways and when they do you must know how to handle it. Sometimes customers ask different questions and request special treatment. You may be able to help them yourself and you certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. Your job is to recognise that there is a problem and make sure that the appropriate person deals with it.

Outcomes of effective performance

When you recognise and deal with customer queries, requests and problems you must consistently:

1 Recognise and deal with customer queries and requests

- 1a. deal with queries and requests from customers in a positive and professional way
- 1b. seek information or help from a colleague if you cannot answer your customer's query or request
- 1c. obtain help from a colleague if you are not able to deal with your customer's request
- 1d. always tell your customer what is happening.

2 Recognise and deal with customer problems

- 2a. recognise when something is a problem from the customer's point of view
- 2b. do not say or do anything which may make the problem worse
- 2c. deal with a difficult customer calmly and confidently
- 2d. recognise when to pass a problem on to an appropriate colleague
- 2e. pass the problem on to your colleague with the appropriate information
- 2f. check that the customer knows what is happening.

Knowledge and understanding

To be competent at recognising and dealing with customer queries, requests and problems you must know and understand:

- a. who, in the organisation, is able to give help and information
- b. limits of what they are allowed to do
- c. what professional behaviour is
- d. how to speak to people who are dissatisfied
- e. how to deal with difficult people
- f. what customers normally expect
- g. how to recognise a problem from what a customer says or does
- h. what kinds of behaviours/actions would make situations worse
- i. the organisational procedures you must follow when you deal with problems or complaints
- j. the types of behaviour that may make a problem worse.

Level: 4

Credit value: 4

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

However good the customer service of your organisation is, some problems will occur. You may not have the authority or experience to deal with the problem yourself so it is important to collect helpful information for those who will deal with it. You need to be able to identify that there is a problem, discover detailed information about that problem and pass on the information so that the problem can be tackled. This unit is about how to collect information about a customer service problem, pass it to the right people in your organisation and keep your customer informed about what is being done.

Outcomes of effective performance

When you take details of customer service problems you must consistently:

1 Respond to customers who raise a problem

- 1a. recognise when your customer is raising a problem
- 1b. respond to your customer calmly and helpfully
- 1c. take details that will identify your customer.

2 Gather details from customers who raise a problem

- 2a. ask your customer questions to clarify what has, or has not, happened to cause a problem
- 2b. check your understanding of what your customer sees as the problem
- 2c. ask your customer questions to clarify their expectations about the service or product that is now causing a problem
- 2d. note the details of what your customer tells you about the problem
- 2e. confirm with your customer details of what they have told you about the problem.

3 Pass details of problems raised by customers to the colleague who can deal with them

- 3a. collect details of any reference codes or identifiers which your organisation uses to identify the customer transaction that is now causing a problem
- 3b. gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications
- 3c. tell your customer what you will do with the details of the problem so that action is taken
- 3d. tell your customer what to expect without making customer service promises that may not be met
- 3e. pass the details to a colleague who is able to deal with the problem.

Knowledge and understanding

To be competent at taking details of customer service problems you must know and understand:

- a. customer expectations of your organisation's services or products that may cause problems if they are not met
- b. how to respond to customers who raise problems in a way that they will find calm and helpful
- c. reference codes or identifiers your organisation uses to identify customers
- d. what questions can be used to gather information that will be most helpful in resolving a problem
- e. details your organisation needs to resolve a problem
- f. details your organisation uses to identify specific customer transactions
- g. the appropriate colleagues to whom you should pass details of problems
- h. your organisation's preferences for the way in which you should pass on details of problems.

Unit 201

Follow the rules to deliver customer service (F2)

Level: 5
Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you follow the rules to deliver customer service you must consistently:

1 Follow your organisation's customer service practices and procedures

- 1a. follow organisational practices and procedures that relate to your customer service work
- 1b. recognise the limits of what you are allowed to do when delivering customer service
- 1c. refer to somebody in authority when you need to
- 1d. work in a way that protects the security of customers and their property
- 1e. work in a way that protects the security of information about customers.

2 Follow legislation and external regulation that relate to customer service

- 2a. work in a way that is safe for your customers and your colleagues
- 2b. treat customers equally
- 2c. respect confidentiality relating to customers and the organisation
- 2d. work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- 2e. work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not.

Knowledge and understanding

To be competent at following the rules to deliver customer service you must know and understand:

- a. organisational practices and procedures that relate to your customer service work
- b. the limits of what you are allowed to do when delivering customer service
- c. when and how you should refer to somebody in authority about the rules for delivering customer service
- d. how you protect the security of customers and their property
- e. how you protect the security of information about customers
- f. your health and safety responsibilities as they relate to your customer service work
- g. your responsibilities to deliver customer service treating customers equally
- h. why it is important to respect customer and organisation confidentiality
- i. the main things you must do and not do in your job under legislation that affects your customer service work
- j. the main things that you must do and not do in your job under external regulations that affect your customer service work.

Level: 5**Credit value: 5**

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deliver reliable customer service you must consistently:

1 Prepare to deal with your customers

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

2 Give consistent service to customers

- 2a. make realistic customer service promises to your customers
- 2b. ensure that your promises balance the needs of your customers and your organisation
- 2c. keep your promises to your customers
- 2d. inform your customers if you cannot keep your promises due to unforeseen circumstances
- 2e. recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- 2f. keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation.

3 Check customer service delivery

- 3a. check that the service you have given meets your customers' needs and expectations
- 3b. identify when you could have given better service to your customers and how your service could have been improved
- 3c. share information with colleagues and service partners to maintain and improve your standards of service delivery.

Knowledge and understanding

To be competent at delivering reliable customer service you must know and understand:

- a. your organisation's services or products
- b. your organisation's procedures and systems for delivering customer service
- c. methods or systems for measuring an organisation's effectiveness in delivering customer service
- d. your organisation's procedures and systems for checking service delivery
- e. your organisation's requirements for health and safety in your area of work.

Unit 213

Deliver customer service on your customer's premises (B3)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This unit is not simply about working in a different building. Your customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for you if your job takes you into your customers' homes.

Outcomes of effective performance

When you deliver customer service on your customer's premises you must consistently:

1 Establish a rapport with your customer

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

2 Combine customer service with your other skills and expertise

- 2a. show respect to your customer's premises and possessions by treating them with care
- 2b. make sure your customer is aware of your specialist technical skills
- 2c. take time to give your customer confidence in your knowledge and skills
- 2d. consider the customer service implications of each action and inform your customer of what will be involved
- 2e. inform your customer when you have finished and reinforce how the work has been handled professionally
- 2f. check that your customer is satisfied with the work and listen carefully to any feedback
- 2g. inform your customer of timescales if any follow up work is involved
- 2h. ensure that timescales for follow up work are kept
- 2i. keep your customer informed if timescales for follow up work are not going to be met
- 2j. explain clearly to your customer why you cannot do work that is not specified in the service offer
- 2k. ensure that your customer has the appropriate details to contact your organisation if they need to.

Knowledge and understanding

To be competent at delivering customer service on your customer's premises you must know and understand:

- a. what you can do to establish a rapport with customers
- b. the importance of sensitivity to people's feelings about their own premises and possessions
- c. the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- d. the insurance implications of working on your customer's premises
- e. the organisational procedures you would take if you cause any accidental damage on your customer's premises.

Unit 214

Recognise diversity when delivering customer service (B4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from your customer. This unit is about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

Outcomes of effective performance

When you recognise diversity when delivering customer service you must consistently:

1 Respect customers as individuals and promote equality in customer service

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

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

- 2a. follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- 2b. show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
- 2c. vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- 2d. work with colleagues to identify consistent approaches that team members should adopt when dealing with particular group.

Knowledge and understanding

To be competent at recognising diversity when delivering customer service you must know and understand:

- a. the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- b. reasons why consideration of diversity and inclusion issues affect customer service
- c. organisational guidelines to make customer service inclusive for diverse groups of customers
- d. how to observe and interpret non-verbal clues
- e. how to listen actively for clues about your customer's expectations and needs
- f. techniques for obtaining additional information from customers through tactful and respectful questions
- g. behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
- h. how to impress specific groups of people to whom you regularly provide customer service.

Unit 215

Deal with customers across a language divide (B5)

Level: 5
Credit value: 8

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language. You should choose this unit if you frequently deal across a language divide. Do not choose this unit if you come across customers who do not share your first language only occasionally.

Outcomes of effective performance

When you deal with customers across a language divide you must consistently:

1 Prepare to deal with customers with a different first language

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

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

- 2a. identify your customer's first language and indicate to them that you are aware of this
- 2b. establish the expectations of your customer regarding whether they expect to deal in your first language or theirs
- 2c. speak clearly and slowly if using a language which is not the first language for either you or your customer
- 2d. maintain a consistent tone and volume when dealing with somebody across a language divide
- 2e. listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words
- 2f. check your understanding of specific words with your customer, using questions for clarification
- 2g. seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers
- 2h. reword a question or explanation if your customer clearly does not understand your original wording
- 2i. use a few words of your customer's first language to create a rapport.

Knowledge and understanding

To be competent at dealing with customers across a language divide you must know and understand:

- a. the languages that you are most likely to encounter among groups of your customers
- b. how to greet, thank and say farewell to customers in their first languages
- c. the importance of dealing with customers in their first language if possible
- d. how to explain to a customer that you cannot hold an extended conversation in their first language
- e. the importance of tone, pace and volume when dealing with customers across a language divide
- f. possible sources of assistance to use when a language barrier demands additional language skills.

Unit 216

Use questioning techniques when delivering customer service (B6)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This unit is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

Outcomes of effective performance

When you use questioning techniques when delivering customer service you must consistently:

1 Establish rapport and identify customer concerns

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

2 Seek detailed information from customers using questioning techniques

- 2a. follow a planned trail of questions to explore in detail customer concerns you have already identified
- 2b. hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
- 2c. explain to your customer why you need the information you are asking for
- 2d. use probing and searching questions that draw on comments or words used by your customer
- 2e. thank your customer for the information in a way that encourages further open responses
- 2f. use pre-planned routing and trigger questions that lead your customer to respond in new areas
- 2g. follow organisational procedures to record your customer responses to inform future actions.

Knowledge and understanding

To be competent at using questioning techniques when delivering customer service you must know and understand:

- a. why establishing rapport makes it easier to draw information from customers
- b. ways to greet customers that immediately build rapport
- c. reasons for using planned question patterns to draw out particular information
- d. reasons for using spontaneous conversation to draw out particular information
- e. the importance of active listening when seeking detailed information from customers
- f. the differences between, and uses of, closed and open questions
- g. the importance of explaining to customers why information is needed
- h. why particular trigger questions are effective in gaining specific information.

Unit 217

Deal with customers using bespoke software (B7)

Level: 5
Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deal with customers using bespoke software you must consistently:

1 Prepare to deliver customer service using bespoke software

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

2 Deliver customer service using bespoke software

- 2a. identify your customer or the services or products they wish to access
- 2b. follow organisational procedures to step through the system in a way that responds to your customer's needs
- 2c. use search or other specialist functions within the software to respond to customer requests
- 2d. enter new records using the bespoke software system
- 2e. amend customer service records in the bespoke software system
- 2f. communicate with your customers in terms they can understand relating to the software system
- 2g. follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- 2h. interpret error messages and act on them to support your customer service
- 2i. refer your customer to a colleague following organisational procedures if you are unable to complete the transaction.

Knowledge and understanding

To be competent at dealing with customers using bespoke software you must know and understand:

- a. access and sign-on routines for the bespoke software system
- b. the architecture and geography of the bespoke software system
- c. different screen or menu routes that can be followed to meet customer requirements
- d. sources of support and help for the bespoke software including manuals, help screens and help lines
- e. the importance of preparing a work area before delivering customer service
- f. search or other enquiry facilities within the bespoke software system
- g. the importance of avoiding jargon and system terminology when communicating with customers
- h. ways to respond to error messages when using a bespoke software system
- i. referral points and sources of information when you are unable to meet customer needs using the bespoke software system.

Unit 218

Maintain customer service through effective hand over (B8)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you maintain customer service through effective hand over you must consistently:

1 Agree joint responsibilities in a customer service team

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

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

- 2a. access reminders to identify when to check that a customer service action has been completed
- 2b. ensure that you are aware of all details of customer service actions your colleague was due to complete
- 2c. ask your colleague about the outcome of their completing the customer service action as agreed
- 2d. identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
- 2e. work with colleagues to review the way in which customer service actions are shared.

Knowledge and understanding

To be competent at maintaining customer service through effective hand over you must know and understand:

- a. your organisation's customer service procedures for the services or products you are involved in delivering
- b. the appropriate colleagues to pass responsibility to for completing particular customer service actions
- c. ways of ensuring that information is passed between you and your colleagues effectively
- d. ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- e. the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- f. opportunities for contributing to review the way customer service actions are shared in customer service processes.

Appendix 1 Sources of general information

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

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

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

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

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

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

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

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

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

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

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

E: singlesubjects@cityandguilds.com

International awards

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

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

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business_unit@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

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

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