

SVQ4 in Customer Service at SCQF Level 8 (4427-04)



Qualification handbook for centres

www.cityandguilds.com
February 2011
Version 2.1 (September 2016)

(This qualification is now closed for registrations, any new candidates from 1 September 2016 should be registered under 4427-40 SVQ in Customer Service at SCQF Level 8)

About City & Guilds

City & Guilds is the UK's leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

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.

Equal opportunities

City & Guilds fully supports the principle of equal opportunities and we are committed to satisfying this principle in all our activities and published material. A copy of our equal opportunities policy statement is available on our website.

Copyright

The content of this document is, unless otherwise indicated, © The City and Guilds of London Institute and may not be copied, reproduced or distributed without prior written consent.

However, approved City & Guilds centres and candidates studying for City & Guilds qualifications may photocopy this document free of charge and/or include a PDF version of it on centre intranets on the following conditions:

- centre staff may copy the material only for the purpose of teaching candidates working towards a City & Guilds qualification, or for internal administration purposes
- candidates may copy the material only for their own use when working towards a City & Guilds qualification

The *Standard Copying Conditions* (which can be found on our website) also apply.

Please note: National Occupational Standards are not © The City and Guilds of London Institute. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

Publications

City & Guilds publications are available from our website or from our Publications Sales department, using the contact details shown below.

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds' products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.

City & Guilds

1 Giltspur Street

London EC1A 9DD

F +44 (0)20 7294 2413

www.cityandguilds.com

centresupport@cityandguilds.com

SVQ4 in Customer Service at SCQF Level 8 (4427-04)



www.cityandguilds.com
February 2011
Version 2.1 (September 2016)

City & Guilds
Skills for a brighter future



www.cityandguilds.com

Contents

1	Introduction to the qualification	5
1.1	Qualification structure	5
1.2	Opportunities for progression	7
1.3	Qualification support materials	8
2	Centre requirements	9
2.1	Resource requirements	9
2.2	Candidate entry requirements	11
3	Course design and delivery	12
3.1	Initial assessment and induction	12
3.2	Recommended delivery strategies	12
4	Assessment	13
4.1	Summary of assessment methods	13
4.2	Evidence requirements	13
4.3	Recording forms	13
4.4	Recognition of prior learning (RPL)	13
5	National Occupational Standards (NOS)	14
Unit 401	Demonstrate understanding of customer service management (F5)	15
Unit 402	Follow organisational rules, legislation and external regulations when managing customer service (F6)	18
Unit 403	Champion customer service (A17)	21
Unit 404	Make customer service environmentally friendly and sustainable (A18)	24
Unit 405	Maintain and develop a healthy and safe customer service environment (B12)	27
Unit 406	Plan, organise and control customer service operations (B13)	30
Unit 407	Review the quality of customer service (B14)	33
Unit 408	Build and maintain effective customer relations (B15)	36
Unit 409	Deliver seamless customer service with a team (B16)	39
Unit 410	Handle referred customer complaints (C8)	42
Unit 411	Implement quality improvements to customer service (D14)	45
Unit 412	Plan and organise the development of customer service staff (D15)	48
Unit 413	Develop a customer service strategy for a part of an organisation (D16)	51
Unit 414	Manage a customer service award programme (D17)	54
Unit 415	Apply technology or other resources to improve customer service (D18)	57
Unit 416	Review and re-engineer customer service processes (D19)	60
Unit 417	Manage customer service performance (D20)	63
Appendix 1	Sources of general information	66

City & Guilds
Skills for a brighter future



www.cityandguilds.com

1 Introduction to the qualification

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

Qualification title and level	SVQ4 in Customer Service at SCQF Level 8
City & Guilds qualification number	4427-04
Qualification accreditation number	GA4J 24
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The level 4 City & Guilds SVQ in Customer Service qualification provides opportunities to recognise the development and implementation of customer service strategies at an operational level. Candidates may not necessarily be responsible for other people within the workplace as their main role will be to ensure effective processes and practice are in place to achieve and continually improve customer service across an entire team, department or organisation, managing change as necessary. The flexible structure of the qualification enables individuals to develop the skills to manage and resolve challenging issues raised by customers. They may implement customer service management software to support their strategy.

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

Version and date	Change detail	Section
Version 2.1 (September 2016)	Note added on front page to refer centres to 4427-40	Front page

1.1 Qualification structure

To achieve the **SVQ4 in Customer Service at SCQF Level 8**, learners must achieve:

Minimum of 8 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 completed in **Group D: Optional Unit**

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

Two further units can be selected from any of **Groups B, C, and E**

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
4427-401	Demonstrate understanding of customer service management (F5)	8	10
4427-402	Follow organisational rules, legislation and external regulations when managing customer service (F6)	8	10
City & Guilds unit number	Group B Optional Units – Impression and Image	SCQF Level	SCQF Credit
4427-403	Champion customer service (A17)	8	10
4427-404	Make customer service environmentally friendly and sustainable (A18)	8	11
City & Guilds unit number	Group C Optional Units – Delivery	SCQF Level	SCQF Credit
4427-405	Maintain and develop a healthy and safe customer service environment (B12)	8	8
4427-406	Plan, organise and control customer service operations (B13)	8	10
4427-407	Review the quality of customer service (B14)	8	8
4427-408	Build and maintain effective customer relations (B15)	8	8
4427-409	Deliver seamless customer service with a team (B16)	8	8
City & Guilds unit number	Group D Optional Units – Handling Problems	SCQF Level	SCQF Credit
4427-410	Handle referred customer complaints (C8)	8	10
City & Guilds unit number	Group E Optional Units – Development and Improvement	SCQF Level	SCQF Credit
4427-411	Implement quality improvements to customer service (D14)	8	10
4427-412	Plan and organise the development of customer service staff (D15)	8	9
4427-413	Develop a customer service strategy for a part of an organisation (D16)	8	11
4427-414	Manage a customer service award programme (D17)	8	7
4427-415	Apply technology or other resources to improve customer service (D18)	8	11
4427-416	Review and re-engineer customer service processes (D19)	8	11
4427-417	Manage customer service performance (D20)	7	7

1.2 Opportunities for progression

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

- Institute of Leadership and Management (ILM) qualifications
- 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 4 SVQ in Customer Service (4543) will be given automatic approval for the new Level 4 SVQ in Customer Service (4427-04). 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 4 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 4 must have:	This can be evidenced by:	A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 4 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	✓	✓	✓

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	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service SVQ Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service SVQ	✓	✓	✓
Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and SVQs at Level 4	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
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.	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	✓	✓	✓
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 and 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.

Assessment of the Level 4 SVQ in Customer Service Units should be carried out in a **real job (either paid or voluntary)**. Simulation and Realistic Working Environment is not accepted at this level by the CFA Assessment Strategy.

Age restrictions

This qualification is not approved for use by candidates under the age of 18 and City & Guilds cannot accept any registrations for candidates in this age group.

There are no other age limits attached to candidates undertaking this qualification unless it 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 401

Demonstrate understanding of customer service management (F5)

Level: 8
Credit value: 10

This unit is part of the Customer Service Theme of Customer Service Foundations. The 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?

Management responsibilities in a role that is directly related to customer service generally involve a set of skills, knowledge and understanding that might be expected of any manager. However, the nature of customer service means that, if you have specific customer service responsibilities, there is a further skills and knowledge set that you need. This unit covers the key principles of customer service that influence how it is managed and the links between your management responsibilities and those key principles. The unit also recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This unit provides the opportunity to demonstrate the knowledge and understanding that is needed to be effective in customer service management.

Outcomes of effective performance

When you demonstrate understanding of customer service management you must consistently:

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

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

2 Demonstrate how your management responsibilities link with customer service principles

- 2a. display leadership in a customer service role
- 2b. contribute to recruitment and development of staff with appropriate customer service skills
- 2c. monitor and maintain effective customer service in your organisation
- 2d. promote improvement of customer service in your organisation.

Knowledge and understanding

To be competent at demonstrating understanding of customer service management you must know and understand:

- a. the customer service management role and responsibilities in relation to your organisation's service offer
- b. the customer service management role and responsibilities in relation to customer expectations and customer satisfaction
- c. how effective customer service depends on a combination of organisational systems and the skills of those responsible for customer service delivery
- d. how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation
- e. how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality
- f. the options for monitoring customer service performance and the benefits and drawbacks of each option
- g. the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors
- h. the key features of a customer service culture in an organisation
- i. how risk assessment can be applied to customer service situations when dealing with customer service problems
- j. options for making use of technology to improve customer service delivery
- k. ways in which an organisation can seek continuous improvement in its customer service
- l. ways in which the ethical and values base of an organisation's approach to customer service are demonstrated and maintained
- m. the nature of your responsibilities for customer service resources and systems in your organisation
- n. your leadership role in customer service delivery
- o. the key skills and attributes to be sought when recruiting for a person to deliver customer service in your organisation
- p. options for training and development of your organisation's staff in customer service and the benefits and drawbacks of each option
- q. qualifications in customer service that may be appropriate for the development of people in your organisation
- r. the importance of the steps you take to monitor and maintain effective delivery of customer service in your organisation
- s. ways in which you promote continuous improvement within your organisation
- t. the importance of establishing a strong network of contacts with similar interests in customer service.

Unit 402

Follow organisational rules, legislation and external regulations when managing customer service (F6)

Level: 8

Credit value: 10

This unit is part of the Customer Service Theme of Customer Service Foundations. The 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?

Management responsibilities, in a role that is directly related to customer service, generally involve actions and knowledge and understanding of legislation and regulation that impact on the management function and the way you fulfil it. Regulation of customer service may originate from within an organisation through policies and procedures or may originate from external regulators. Some legislation applies directly to the relationship between service providers and customers. This unit is about observing the law and rules and what you need to know and understand in order to manage customer service processes effectively.

Outcomes of effective performance

When you follow organisational rules, legislation and external regulations when managing customer service you must consistently:

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

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

2 Follow legislation and external regulation when managing customer service

- 2a. manage customer service activities following legislation and external regulation
- 2b. assess the risks resulting from non-compliance with legislation and external regulation when supervising the delivery of customer service
- 2c. contribute to development of customer service policies and strategy that comply with legislation and external regulation.

Knowledge and understanding

To be competent at following organisational rules, legislation and external regulations when managing customer service you must know and understand:

- a. the steps that managers can take to encourage development of a customer service culture in your organisation
- b. the importance of influencing skills for the development of customer service in your organisation
- c. the opportunities provided and constraints placed on customer service delivery by the policies and procedures of your organisation
- d. the structure of authority in your organisation relating to customer service management
- e. the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise customer service management actions alone
- f. how you should involve service partners in customer service management actions
- g. the sources of information about organisational rules, policies and procedures that relate to customer service
- h. your organisation's definition of a complaint and your responsibility in connection with complaints
- i. the structure of legislation and external regulation that impacts on the customer service of your organisation
- j. the importance of the regulatory authority of different legal and regulatory bodies for your organisation
- k. the risks for your organisation presented by non-compliance with different legal and regulatory bodies
- l. the level of knowledge and understanding needed by people in your organisation involved in customer service delivery regarding relevant legislation and external regulation
- m. the importance of taking full account of legal and regulatory requirements when planning customer service developments
- n. the relationship between customer service strategy and compliance.

Level: 8
Credit value: 10

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?

Staff, with high levels of responsibility for customer service, have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit. This unit is about acting as a champion – being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your knowledge and expertise to others.

Outcomes of effective performance

When you champion customer service you must consistently:

1 Promote the importance and benefits of customer service

- 1e. explain the role of customer service within your organisation's strategic and business plans
- 1f. continuously monitor developments in your organisation in order to identify those important to customer service
- 1g. analyse the implications of these customer service developments
- 1h. question and challenge developments from the customer's standpoint
- 1i. use your influence to ensure that developments improve customer service.

2 Provide advice and information on customer service issues

- 2a. make it known that you can provide customer service advice and information
- 2b. respond to requests for customer service advice and information
- 2c. carry out any necessary research to enhance or verify the advice and information you are giving
- 2d. communicate customer service advice and information effectively
- 2e. help others to explore the implications of your advice and information for their own work and identify actions that the advice and information might prompt
- 2f. monitor how effective your advice and information has been
- 2g. review the way you collect information, formulate advice and communicate it to others.

Knowledge and understanding

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

- a. the processes for decision making within your organisation and who is involved
- b. how to monitor developments within your organisation
- c. how to use your influence and authority to affect decision making
- d. the types of developments that are likely to affect customer service and how to analyse the implications for customer service
- e. the importance of empathising with customers and how to represent their viewpoint in a constructive way
- f. how to identify when others need advice and information on customer service issues
- g. how to use different types of research to support your advice and information on customer service
- h. how to apply your advice and information in practice
- i. how to monitor the effect of your advice and information.

Unit 404

Make customer service environmentally friendly and sustainable (A18)

Level: 8
Credit value: 11

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?

Environmental awareness and positive action form an important aspect of strategy for many organisations. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. Periodically, the link between customer service and environmentalism needs to be reviewed so that appropriate changes may be made. Environmental and sustainability awareness must be encouraged constantly so that staff, suppliers, customers and other stakeholders are reminded of their contributions and responsibilities. This unit is appropriate for you if your job involves responsibility for customer service and sufficient authority to review and promote environmental matters in your organisation or in some part of it.

Outcomes of effective performance

When you make customer service environmentally friendly and sustainable you must consistently:

1 Review and monitor environmental and sustainability aspects of customer service

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

2 Promote environmental and sustainable aspects of customer service in your organisation

- 2a. make links between your organisation's environmental policies and customer service delivery routines
- 2b. encourage those involved in customer service delivery to promote an environmental approach by customers
- 2c. identify and promote ways to minimise resource use in customer service delivery
- 2d. communicate your organisation's environmental policies to service partners including suppliers and encourage their participation in environmental improvements
- 2e. communicate your organisation's environmental policies to customers and encourage their participation in environmental improvements
- 2f. develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability
- 2g. develop community stakeholder's awareness of your organisation's environmental policies and approaches.

Knowledge and understanding

To be competent at making customer service environmentally friendly and sustainable you must know and understand:

- a. principles of environmentalism and sustainability that are relevant to customer service operations
- b. ways to express environmental policies and link them with customer service
- c. principles of energy management and reduction of carbon emissions
- d. principles of waste management relevant to your organisation
- e. techniques for reviewing environmental aspects of customer service systems
- f. different actions that may be taken to improve environmental aspects of customer service delivery
- g. ways to minimise resource use in customer service delivery
- h. techniques for communicating and developing awareness of environmental matters among stakeholders
- i. ways to encourage customers to act more environmentally friendly.

Unit 405

Maintain and develop a healthy and safe customer service environment (B12)

Level: 8
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?

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers. This unit is about managing the delivery of services or products in a way that is safe for customers and colleagues.

Outcomes of effective performance

When you maintain and develop a healthy and safe customer service environment you must consistently:

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

- 1a. identify health and safety hazards in your customer service environment
- 1b. assess the risks associated with these hazards
- 1c. identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers
- 1d. evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against your organisation's policies and procedures and customer expectations
- 1e. provide information about risks and hazards to those responsible for health and safety.

2 Minimise risks to health and safety in the customer service environment

- 2a. ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety
- 2b. ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures
- 2c. ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them
- 2d. enable staff to identify and report health and safety hazards
- 2e. use agreed organisational procedures to deal with hazards when they occur
- 2f. review the health and safety aspects of the customer service environment, as required by law and your organisation
- 2g. carry out emergency drills within your area of responsibility
- 2h. follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents.

Knowledge and understanding

To be competent at maintaining and developing a healthy and safe customer service environment you must know and understand:

- a. the importance of maintaining a healthy, safe and effective working environment for customers and staff
- b. your responsibilities for health and safety in the workplace
- c. your responsibilities for maintaining an effective working environment
- d. how to access information on legal and regulatory requirements for health and safety and relevant codes of practice
- e. the types of health and safety hazards that are likely to occur in your area of responsibility
- f. how to assess the risks associated with these health and safety hazards
- g. how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice
- h. your organisation's policies and procedures for health and safety
- i. the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment.

Unit 406

Plan, organise and control customer service operations (B13)

Level: 8
Credit value: 10

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?

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

Outcomes of effective performance

When you plan, organise and control customer service operations you must consistently:

1 Plan customer service operations

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

2 Supervise customer service operations

- 2a. negotiate the availability of people and other resources that you need to implement your customer service delivery plans
- 2b. develop specific, measurable and realistic targets for the staff who deliver customer service
- 2c. ensure that planned resources are available when required
- 2d. brief staff on their objectives and targets
- 2e. encourage feedback from staff and customers and use their feedback to modify objectives and targets
- 2f. collect and analyse feedback from customers and staff on customer service operations
- 2g. evaluate how effectively agreed outcomes and processes are being achieved
- 2h. modify your plans for customer service operations in the light of your evaluation.

3 Deal with problems relating to customer service operations

- 3a. collect information on the nature of the problem and assess the likely impact on the customer
- 3b. identify the causes of the problem and possible solutions
- 3c. evaluate possible solutions against customer expectations and organisational needs
- 3d. select and implement an acceptable solution with the minimum possible disruption to customers
- 3e. monitor the implementation of the solution and, where necessary, make adjustments.

Knowledge and understanding

To be competent at planning, organising and controlling customer service operations you must know and understand:

- a. how to develop plans for customer service operations and what these plans should contain
- b. how to identify and work within allocated budgets and time targets for customer service operations
- c. the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- d. the types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- e. how to develop objectives and targets for staff
- f. the importance of briefing staff and how to do so effectively
- g. the importance of monitoring the quality of your customer service operations
- h. the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- i. the importance of liaising with customers and colleagues about problems and possible solutions
- j. how to identify and evaluate possible solutions.

Level: 8

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?

People managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal. They also need to know what to do to improve customer service to meet and exceed customer expectations. This unit is about planning how you measure standards of customer service by collecting and analysing information. You must develop conclusions and recommendations and then report your findings to relevant people. Most of all, this unit is about approaching the review of customer service quality systematically and making full use of your findings.

Outcomes of effective performance

When you review the quality of customer service you must consistently:

1 Plan how to measure customer service

- 1a. identify the features of customer service delivery that affect customer satisfaction
- 1b. plan how you will monitor the features of customer service delivery that affect customer satisfaction
- 1c. plan how you will analyse the information you have collected.

2 Collect and analyse information on customer service

- 2a. implement your plans for monitoring customer service processes and outcomes
- 2b. analyse the monitoring information you have collected
- 2c. compare the conclusions of your analysis with the criteria you identified
- 2d. adapt your plans if the agreed methods of collecting and analysing information are not proving effective
- 2e. communicate the results of your measurement of customer service to colleagues
- 2f. agree actions to improve customer service that result from your measurements and analysis.

Knowledge and understanding

To be competent at reviewing the quality of customer service you must know and understand:

- a. the importance of measuring the quality of customer service
- b. how to identify which aspects of the customer service process affect customer satisfaction
- c. how to select the criteria you will use for measurement of customer service
- d. how to construct representative samples
- e. the types of information collection methods you could use
- f. methods of analysing information on the quality of customer service
- g. how to identify recommendations that flow from your measurement of customer service.
- h. the procedures for making recommendations on customer service improvements within your organisation.

Unit 408

Build and maintain effective customer relations (B15)

Level: 8
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?

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This unit is about establishing and maintaining such relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success. This unit is only for you if you are in a position to influence the way your organisation determines the level of service offered to different customers.

Outcomes of effective performance

When you build and maintain effective customer relations you must consistently:

1 Establish effective customer relations

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

2 Maintain and develop effective customer relations

- 2a. keep customers informed and accept criticism from customers openly and constructively
- 2b. regularly assess whether customer expectations are being consistently met
- 2c. use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded
- 2d. collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction
- 2e. analyse customer relations and propose changes that will develop longer term loyalty to people with authority in your organisation.

Knowledge and understanding

To be competent at building and maintaining effective customer relations you must know and understand:

- a. how to identify and prioritise types of customers with whom you should be building a longer term relationship
- b. the most appropriate method of establishing relationships with customers targeted for longer term relationships
- c. the importance of effective communication skills when dealing with customers
- d. how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship
- e. how to communicate with customers, especially when they are dissatisfied with products and services
- f. how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
- g. the types of compromises that would be acceptable to your organisation when meeting customer expectations
- h. how to use your influence and authority in your organisation to meet or exceed customer expectations
- i. methods of monitoring customer satisfaction appropriate to your level of authority in the organisation

Unit 409

Deliver seamless customer service with a team (B16)

Level: 8
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?

Excellent customer service is a team effort. You cannot win and maintain the loyalty of customers without pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities. The team probably includes colleagues, senior managers and service partners who are working in other departments or outside organisations but still contribute to customer service delivery. To achieve your organisation's aims and objectives for customer service you will need to have effective working relationships with all of these – especially when you urgently need their co-operation and support.

Outcomes of effective performance

When you deliver seamless customer service with a team you must consistently:

1 Build effective working relationships with colleagues

- 1a. identify and agree with colleagues team strategies for delivering seamless customer service
- 1b. share information and knowledge to improve customer service
- 1c. encourage, accept and respond positively to feedback from colleagues on customer service performance
- 1d. work with colleagues to deal with conflict constructively
- 1e. review teamwork strategies for delivering seamless customer service with colleagues.

2 Build effective relationships with service partners

- 2a. identify the service partners who are most significant to delivery of seamless customer service
- 2b. take opportunities to establish and develop effective working relationships with service partners
- 2c. ensure that your commitments to service partners and their commitments to you are being fulfilled as agreed
- 2d. communicate clearly and in good time with service partners on issues that affect them and your customers
- 2e. work together with service partners to resolve customer service problems
- 2f. work together with service partners to deal with conflict constructively.

Knowledge and understanding

To be competent at delivering seamless customer service with a team you must know and understand:

- a. how to analyse the contribution and roles of colleagues and service partners when delivering customer service
- b. the types of support you could provide to colleagues and service partners and they could provide to you to deliver seamless customer service
- c. the benefits and challenges of collaborative working, what may go wrong and how to prepare for this
- d. the value and importance of effective communication with colleagues and service partners
- e. the types of behaviours that show you have a relationship of respect and honesty with colleagues and service partners
- f. how to deal with conflict constructively.

Level: 8
Credit value: 10

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

Outcomes of effective performance

When you handle referred customer complaints you must consistently:

1 Investigate referred customer complaints

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

2 Take action to deal with referred customer complaints

- 2a. identify a range of possible solutions that balance customer expectations and your organisation's service offer
- 2b. liaise with your customer and colleagues to negotiate an acceptable solution
- 2c. agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
- 2d. implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken.

3 Identify repeated customer complaints and recommend changes to policies and procedures

- 3a. identify patterns and trends in customer complaints
- 3b. analyse trends in customer complaints
- 3c. identify solutions acceptable to your customers that fit your organisation's service offer
- 3d. identify possible changes to customer service policies and procedures
- 3e. consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
- 3f. select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers.

Knowledge and understanding

To be competent at handling referred customer complaints you must know and understand:

- a. the importance of minimising customer complaints and dealing with them effectively and promptly when they occur
- b. your organisation's complaints procedures and the limits of your authority
- c. the procedures you must follow if a complaint is likely to be escalated or have wider implications
- d. the types of complaints that could have wider implications for your organisation
- e. why it is important to communicate with your customer at all stages of a complaints procedure
- f. how to devise solutions that balance customer expectations and organisational aims
- g. why it is important to identify, and present to the customer, a range of possible options
- h. why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
- i. how to identify trends and patterns in customer complaints and solutions
- j. how to explore the implications of these patterns and trends for your organisation's policies and procedures
- k. how to recommend changes to organisational policies and procedures.

Unit 411

Implement quality improvements to customer service (D14)

Level: 8
Credit value: 10

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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?

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular, it is vital to involve customers at all stages of the quality improvement process.

Outcomes of effective performance

When you implement quality improvements to customer service you must consistently:

1 Plan the introduction of customer service improvements

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

2 Manage the implementation of customer service improvements

- 2a. inform the people who will be affected by change, win their support and keep them informed of progress
- 2b. implement your plans for improvements dealing effectively with any difficulties
- 2c. provide the necessary support to all your colleagues who are involved with changes and improvements
- 2d. ensure that the planned improvements are implemented on time and within budget.

3 Monitor and evaluate customer service improvements

- 3a. monitor and evaluate the impact that the changes are having on the quality of customer service
- 3b. identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements
- 3c. identify any lessons from the change process and note these for future activities.

Knowledge and understanding

To be competent at implementing quality improvements to customer service you must know and understand:

- a. the importance of careful planning when introducing change
- b. the types of factors that may help or hinder the process of change and how to identify and plan for these
- c. how to develop plans that contain realistic objectives, tasks and schedules
- d. the importance of having clear lines of responsibility and accountability
- e. how to identify and plan for possible contingencies
- f. the importance of clear communication when changes are taking place
- g. why it is important to win the support of people who will be affected by change
- h. how to win over staff who are resistant to change
- i. the types of support that staff may need when improvements are being implemented and how to provide such support
- j. why it is important to complete change on time and within budget
- k. how to monitor and evaluate the impact of change
- l. why it is important to evaluate change and to note any lessons for future initiatives.

Unit 412

Plan and organise the development of customer service staff (D15)

Level: 8
Credit value: 9

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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?

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process. This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

Outcomes of effective performance

When you plan and organise the development of customer service staff you must consistently:

1 Identify customer service staff development and training needs

- 1a. identify where customer service could be improved through staff training and development
- 1b. help staff providing customer service to identify their own development and training needs
- 1c. help staff to identify how they learn best
- 1d. agree the types of staff development and training activities that are needed
- 1e. report staff development needs to relevant people in your organisation.

2 Organise customer service development and training

- 2a. agree the aims and objectives of the customer service development and training activities
- 2b. agree the type and style of customer service development and training that are appropriate
- 2c. agree the detailed design of customer service development and training activities
- 2d. organise customer service development and training activities
- 2e. monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice
- 2f. organise additional help and training for staff where this is needed.

Knowledge and understanding

To be competent at planning and organising the development of customer service staff you must know and understand:

- a. the importance of continuously developing staff that provide customer service
- b. current objectives and targets that relate to customer service in your area of responsibility
- c. how to identify when development and training could improve customer service performance
- d. the range of types and styles of development and training and how to select those that are appropriate to customer service, your organisation, and specific training and development needs
- e. why it is important that you should have an input into the design and delivery of customer service development and training for your staff
- f. how you can help staff to put into practice what they have learned
- g. how to assess the impact that development and training has had on customer service performance
- h. the types of additional support you could provide to staff following development and training.

Unit 413

Develop a customer service strategy for a part of an organisation (D16)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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?

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service. This unit does not assume you have full responsibility for your organisation's customer service strategy but that you take a major role in the development of strategy for a particular part of your organisation.

Outcomes of effective performance

When you develop a customer service strategy for a part of an organisation you must consistently:

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

- 1a. identify your organisation's values, aims and objectives
- 1b. identify the role of a given part of the organisation in achieving the strategy
- 1c. evaluate the implications of the strategy for customer service in this part of the organisation
- 1d. confirm the implications of the strategy for customer service with colleagues
- 1e. collect information on and analyse customer expectations
- 1f. match customer expectations with the customer service implications of the business strategy for a given part of your organisation.

2 Help to identify current and future best practice in customer service

- 2a. identify other organisations which represent models of good practice in customer service
- 2b. evaluate the key features of customer service in these organisations and the principles that underpin their approaches
- 2c. identify and analyse current research on trends and developments in customer service
- 2d. identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
- 2e. explore the implications of your research for the part of the organisation you are working in
- 2f. discuss the outcomes of your research with colleagues.

3 Identify and recommend the key features of a customer service strategy

- 3a. identify values, aims and objectives that are consistent with your research
- 3b. identify contact processes and channels for customer service that are consistent with your values, aims and objectives
- 3c. identify how you will evaluate the effectiveness of the strategy
- 3d. discuss with colleagues the key features of a customer service strategy
- 3e. construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers.

Knowledge and understanding

To be competent at developing a customer service strategy for a part of an organisation you must know and understand:

- a. the importance of having a customer service strategy for a given part of the organisation
- b. how to access information on your organisation's overall business strategy and analyse its implications
- c. sources of information you can use to find out about your customers and their expectations
- d. the importance of customer loyalty and customer service practices that can help to retain loyalty
- e. how to identify other organisations which might represent models of best practice in customer service
- f. sources of research on trends and developments in customer service
- g. how to develop values, aims and objectives relevant to customer service
- h. procedures for making recommendations within your organisation.

Unit 414

Manage a customer service award programme (D17)

Level: 8
Credit value: 7

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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 the competences involved in managing a customer service award programme. A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers your commitment to customer service. Whilst such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take full account of the strategic customer service implications.

Outcomes of effective performance

When you manage a customer service award programme you must consistently:

1 Plan a customer service award programme

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

2 Implement and manage a customer service award programme

- 2a. launch developments in the customer service award programme in a way that informs and motivates customers and team members
- 2b. ensure that the criteria for the customer service awards are transparent and are considered fair by team members
- 2c. publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
- 2d. organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
- 2e. announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
- 2f. review and evaluate the effects of the customer service awards programme on customers and team members.

Knowledge and understanding

To be competent at managing a customer service award programme you must know and understand:

- a. the principles of motivation and in particular the importance of recognition as a motivator
- b. how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
- c. the benefits and drawbacks of different rewards associated with award programmes.

Unit 415

Apply technology or other resources to improve customer service (D18)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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 changes and improves sometimes through the application of technology or other resources as much as through changes in behaviour of those delivering the service. Whilst these changes can bring real benefits they inevitably come at an initial cost which must be taken into consideration. This unit is about the process of managing the application of technology or other resources to a customer service process. It involves a systematic approach to considering and evaluating options, implementing the most appropriate and reviewing the results.

Outcomes of effective performance

When you apply technology or other resources to improve customer service you must consistently:

1 Identify and specify opportunities for customer service improvement

- 1a. monitor developments in technology and the use of other resources to improve customer service
- 1b. review customer service delivery systems with specific reference to use of resources and technology
- 1c. identify opportunities and options for improving customer service by applying technology or other resources
- 1d. analyse the customer service benefits that could result from options for improvement
- 1e. specify the changes in technology or other resources needed to deliver the options.

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

- 2a. identify the options for improving customer service with the application of technology or other resources
- 2b. establish the costs associated with each option for improving customer service
- 2c. list and, where possible, quantify the benefits from each option for improving customer service
- 2d. estimate the affordability of each option to improve customer service
- 2e. recommend the most appropriate options for implementation
- 2f. identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions
- 2g. plan a business case to support your recommendations for improvements through application of technology or other resources.

3 Oversee the implementation of resource changes to improve customer service

- 3a. plan implementation using details of agreed developments to improve customer service
- 3b. brief colleagues about the implementation of customer service improvements and the expected benefits
- 3c. monitor implementation of customer service improvements and the expected benefits
- 3d. review implementation of customer service improvements with colleagues
- 3e. make appropriate adjustments to implementation of customer service improvements as a result of review.

Knowledge and understanding

To be competent at applying technology or other resources to improve customer service you must know and understand:

- a. features and functionality of available technology that may contribute to improvements in customer service
- b. how the application of additional resources, other than technology, can be used to improve customer service
- c. methods for the systematic review of customer service systems
- d. techniques to analyse the costs and benefits of options for improving customer service
- e. methods for presenting a business case for applying technology or other resources to make improvements in customer service
- f. briefing techniques for introducing colleagues to changes
- g. ways to review and adjust customer service delivery after the implementation of changes.

Unit 416

Review and re-engineer customer service processes (D19)

Level: 8
Credit value: 11

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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?

From time to time, a customer process must be subject to review. Most of all, this is because both customer expectations and the general environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost. This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers. This unit is for you if you are responsible for reviewing customer service processes. Do not use this unit if you do not hold that responsibility and do not have the support of those with authority to make changes.

Outcomes of effective performance

When you review and re-engineer customer service processes you must consistently:

1 Scope the customer service processes to be reviewed

- 1a. define the boundaries of a customer service process
- 1b. agree, with the appropriate people, the boundaries of the customer service process to be reviewed
- 1c. set parameters for the types of change that might be made during the re-engineering
- 1d. communicate with everybody involved regarding the aims of the review.

2 Analyse the customer service process and identify improvement opportunities

- 2a. identify all the key steps in the customer service process
- 2b. analyse each step in the customer service process in fine detail
- 2c. assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation
- 2d. raise questions about each step in the current process to establish where there is scope for development and improvement
- 2e. explore all the questions raised with those involved in the process and their managers
- 2f. identify options for re-engineering improvements that deserve further investigation.

3 Evaluate improvement options and re-engineer service processes

- 3a. evaluate each option for re-engineering improvements that deserve further investigation
- 3b. make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process
- 3c. plan the implementation of agreed recommendations for re-engineering the customer service process
- 3d. implement re-engineering of the customer service process
- 3e. monitor the results of implementing re-engineering of the customer service process.

Knowledge and understanding

To be competent at reviewing and re-engineering customer service processes you must know and understand:

- a. ways to establish boundaries around a customer service process to be re-engineered
- b. who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through
- c. the importance of communicating with those involved in service delivery when re-engineering the process
- d. ways to analyse and assess the effectiveness of separate steps in the customer service process
- e. the importance of identifying the right questions to challenge existing customer service processes appropriately
- f. techniques for implementing changes in customer service processes
- g. the importance of monitoring the effects of customer service process changes.

Level: 7**Credit value: 7**

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. 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 performance can be measured by a wide variety of metrics and ratings collected in different ways by different organisations. Those measurements are needed if you are to be able to manage performance systematically and take positive actions for improvement. Information on performance must be collected and interpreted in order to identify appropriate management actions to promote improvement. This may involve reference to standards, benchmarks, targets and tolerances and also the identification of trends and patterns in the evidence that is monitored. This unit is about those monitoring and management processes. This unit is for you if you have responsibility for the customer service performance of individuals or a team and you have the authority to see management actions through.

Outcomes of effective performance

When you manage customer service performance you must consistently:

1 Monitor performance in customer service operations

- 1a. collect regular statistics on customer service operations performance
- 1b. interpret broad patterns of customer service operations statistics
- 1c. investigate questions raised by interpretation and analysis of performance
- 1d. interpret statistics regarding customer service performance in specific product and service areas
- 1e. match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
- 1f. use customer service performance statistics to identify trends
- 1g. compare customer service performance statistics with broader quality monitoring results
- 1h. review resource provision to identify any resource changes needed to improve customer service performance management.

2 Take management actions to improve performance in customer service operations

- 2a. identify management actions to maintain and improve on customer service performance
- 2b. summarise monitoring evidence to support the case for management actions to improve performance
- 2c. brief team members on changes they must make to improve customer service performance
- 2d. organise resource changes needed to improve customer service performance
- 2e. organise suitable coaching or training to improve customer service performance where development needs have been identified
- 2f. adjust customer service performance targets which have ceased to be both challenging and achievable.

Knowledge and understanding

To be competent at managing customer service performance you must know and understand:

- a. methods for collecting statistics on customer service operations performance
- b. techniques for interpreting customer service performance statistics
- c. the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)
- d. sources of benchmarks and standards for customer service performance
- e. techniques for identifying trends and patterns in customer service performance
- f. options for management actions that will improve customer service performance
- g. methods of coaching and training to improve customer service performance.

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.

City & Guilds
Skills for a brighter future



www.cityandguilds.com

City & Guilds
Skills for a brighter future



www.cityandguilds.com

Useful contacts

UK learners

E: learnersupport@cityandguilds.com

General qualification information

International learners

F: +44 (0)20 7294 2413

General qualification information

E: intcg@cityandguilds.com

Centres

F: +44 (0)20 7294 2413

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

E: centresupport@cityandguilds.com

Single subject qualifications

F: +44 (0)20 7294 2413

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 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

F: +44 (0)20 7294 2413

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

E: intops@cityandguilds.com

Walled Garden

F: +44 (0)20 7294 2413

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

E: walledgarden@cityandguilds.com

Employer

T: +44 (0)121 503 8993

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

E: business_unit@cityandguilds.com

Publications

F: +44 (0)20 7294 2413

Logbooks, Centre documents, Forms, Free literature

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

Published by City & Guilds
1 Giltspur Street
London
EC1A 9DD
F +44 (0)20 7294 2413
www.cityandguilds.com

City & Guilds is a registered charity
established to promote education
and training