Unit 203/663 Principles of customer service

UAN:	**J/506/2132**
Level:	2
Credit value:	4
GLH:	34
Assessment type:	E-volve or Portfolio of evidence
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA
Aim:	This unit aims to develop knowledge and understanding regarding the key principles of customer service. Upon completion of this unit, learners will have developed an understanding of customer service and how to deliver it effectively. Learners will also develop an awareness of how legal and ethical requirements relate to customer service and will understand the management of customer service information.

Learning outcome
The learner will: 1. understand customer service
Assessment criteria
The learner can: 1.1 explain the **purpose** and **scope** of customer service 1.2 define the term “service offer” 1.3 explain the value of a “service offer” to an organisation 1.4 explain the importance of delivering consistently high quality customer service 1.5 explain the importance of keeping up to date with knowledge of **competitors’ activities** 1.6 explain **barriers** to providing effective customer service 1.7 describe the **features** of effective follow-up service.

Range
Purpose • to ensure the needs and wants of customers are met by an organisation • meeting customer expectations and ensuring satisfaction **Scope** • what an organisation will offer in the way of customer service • what the limitations are • laid out in the customer charter **Competitors activities** • new products/services • prices • advertising campaigns • promotions **Barriers** • lack of product/service knowledge • limits of authority • lack of knowledge of responsibility **Features** • after sales service • help desk • after sales guarantee/warranty/returns policy

Learning outcome
The learner will: 2. understand how legal and ethical requirements relate to customer service
Assessment criteria
The learner can: 2.1 describe how sales and **consumer related legislation** and regulations affect the delivery of customer service 2.2 describe how **health, safety and environmental legislation** affects customer service delivery 2.3 explain how **ethical considerations** affect customer service 2.4 explain how **equality legislation** affects customer service 2.5 describe how **legislation** affects the use and storage of customer information.

Range
Consumer-related legislation • Consumer Credit Act 2006 • Misrepresentation Act 1967 • Sale of Goods Act 1979 and 2002 • Consumer Protection Act 1987 • Trades Descriptions Act 1968 **Health, safety and environmental legislation** • Health and Safety at Work Act 1979 **Ethical considerations** • courtesy • respect • commitment • honesty **Equality legislation** • The Equality Act 2010 **Legislation** • The Data Protection Act 1998

Learning outcome
The learner will: 3. understand how to deliver effective customer service
Assessment criteria
The learner can: 3.1 explain the difference between customers' **wants**, **needs** and their expectations 3.2 explain how to **identify customers' needs and expectations** 3.3 explain the importance of managing customers' expectations 3.4 explain how to **behave** in a way that meets customers' expectations 3.5 describe **techniques** that can be used to put **customers at ease and gain their trust** 3.6 explain the importance of following up actions and keeping promises when delivering customer service.

Range
Wants • based on emotional factors **Needs** • based on necessity **Identify needs and expectations**

- questioning eg open and probing to identify needs and expectations and closed questions to confirm understanding
- observe non- verbal cues eg body language

Behaviours

- offer a high standard of service
- listen to customers
- follow up issues
- show knowledge of products/services
- meet the standards of the organisation

Techniques to put customers at ease

- be approachable
- actively listen to them
- show interest
- be patient
- check understanding
  show respect
- allow questioning

The techniques to gain trust

- be honest
- show interest
- use positive body language
- be consistent
- keep promises
- show empathy

Learning outcome
The learner will: 4. understand the management of customer service information
Assessment criteria
The learner can: 4.1 explain how **customer service information** can be used 4.2 explain the importance of **systems** to manage customer service information 4.3 explain the uses of **systems** to manage customer service information 4.4 identify the **features** of an effective customer complaints process 4.5 describe the **uses** of a customer complaints process.

Range
Customer service information • customer records • complaint records • sales figures • product/service brochures • organisational data **Systems** • customer database • sales records system (ie CRM) **Features** • clear reporting process • staff training • commitment to resolution • formal recording process **Uses** • handle complaints efficiently • ensure complaints are recorded • ensure records are retained • monitor complaints to ensure customer satisfaction • recognise trends in complaints • identify improvements • Identify staff development needs • develop customer trust • ensure consistency

Additional Guidance if delivered as Portfolio based

Candidates will be expected to have carried out research on the range stated in each of the above learning outcomes even though they might not be applicable to their own organisation.

Candidates will be required to submit a report of a minimum of 2000 words to a maximum of 3500 words.
The report must show that candidates have developed:

- an understanding of customer service and its effective delivery
- how legal and ethical requirements relate to customer service
- an understanding of the management of customer service information

Any necessary additional coverage could be generated through professional discussion. Examples of products where appropriate could also be used and cross-referenced into appropriate units.