GQA Level 3 Diploma in Customer Service

Qualification Number
603/5637/6

PERSONAL COMPETENCE SUMMARY

Name		Company/Centre	
Job Title		GQA Registration Number	

UNITS OF COMPETENCE				ASSESSOR SIGNATURE Performance and knowledge assessment completed and supplemented with evidence overtime	DATE
Unit Number	MANDATORY UNITS	Level	Credit		
H/618/0196 CS1	Organise and deliver customer service	3	5		
L/618/0466 CS2	Understand the customer service environment	3	5		
R/618/0467 CS3	Resolve customers' problems	3	4		
Y/618/0468 CS4	Principles of business	3	10		
D/618/0469 CS5	Manage personal and professional development	3	3		
R/618/0470 CS6	Understand customers and customer retention	3	4		
Optional Group 1 (Minimum of 15 Credits)					
Optional Group 2 (Minimum of 9 Credits)					

RELIABLE EVIDENCE: The forms of evidence available include (mark as appropriate)

Observation in the workplace ☐   Assessment of knowledge ☐
Records of prior experience ☐   Witness statement(s) ☐
Testimonial(s) ☐   Photographic evidence ☐
Work records ☐   External testing ☐

Passport Style
Candidate Photo
(Mandatory)

COMPETENCE COMPLETION SIGNATURES

By signing here, the Candidate and Assessor confirm that evidence presented is authentic and that the assessments took place in accordance with the relevant assessment strategy. Details of the assessments and evidence must be recorded in the assessment decision record/summaries at the end of each unit page.

	Name and Signature	Date
Candidate		
Lead Assessor		
Internal Verifier		
EQA		

Introduction to the Qualification

Who is this Qualification for?

The Level 3 Customer Service qualification is designed to provide learners with the skills, knowledge and competencies to operate effectively as a Customer Service worker within a wide variety of industry contexts.

This will provide opportunities for individuals to develop their skills in a service role such as dealing with routine and non-routine customer queries, effective customer communication skills using a variety of mediums, meeting customer needs, complaint resolution and also to develop the learners' own personal and professional development. It is understood that not all job roles have the same requirements so in addition to the mandatory units the qualification structure will allow as wide an uptake as possible.

Unit No	Mandatory Units	Level	Credit
H/618/0196 CS1	Organise and deliver customer service	3	5
L/618/0466 CS2	Understand the customer service environment	3	5
R/618/0467 CS3	Resolve customers' problems	3	4
Y/618/0468 CS4	Principles of business	3	10
D/618/0469 CS5	Manage personal and professional development	3	3
R/618/0470 CS6	Understand customers and customer retention	3	4
Optional Group 1 (Minimum of 15 Credits)			
Y/618/0471 CS7	Communicate verbally with customers	2	3
D/618/0472 CS8	Communicate with customers in writing	2	3
H/618/0473 CS9	Exceeed customer expectations	2	3
K/618/0474 CS10	Promote additional products and/or services to customers	2	2
M/618/0475 CS11	Deliver customer service while working on customers' premises	2	4
T/618/0476 CS12	Deliver customer service to challenging customers	2	3
A/618/0477 CS13	Develop customer relationships	2	3
F/618/0478 CS14	Support customer service improvements	2	3
J/618/0479 CS15	Support customers through real-time online customer service	2	3
A/618/0480 CS16	Use social media to deliver customer service	2	3
Optional Group 2 (Minimum of 9 Credits)			
F/618/0481 CS17	Negotiate in a business environment	3	4
M/618/0489 CS18	Promote equality, diversion and inclusion in the workplace	3	3

H/618/0490	Manage individuals' performance	3	4
CS19			
K/618/0491	Manage diary systems	2	2
CS20			
M/618/0492	Contribute to the organisation of an event	2	3
CS21			
T/618/0493	Provide Reception services	2	3
CS22			
A/618/0494	Processing sales orders	2	2
CS23			

Achievement of the required credit indicated above will mean the qualification has been completed and GQA will provide the Certificate with the qualification title. Where a candidate has completed additional credits the Certificate will list these as "additional credits". In cases where the candidate has not completed the requirements of the full qualification and will not go on to do so, a Certificate of credit can be issued for the credits achieved.

Assessment Guidance
Evidence should show that candidates can complete all of the learning outcomes for each unit being taken.

Type and quantity of evidence:
Evidence of performance and knowledge is required. Evidence of performance should be demonstrated by activities and outcomes, and should be generated in the workplace in a way that shows that candidates can meet the requirements of the units in a way that demonstrates that the standards can be achieved consistently over an appropriate period of time. Evidence of knowledge can be demonstrated through a range of methods including responses to oral and/or written questions, assignments, or professional discussions.

Potential sources of evidence:
The main source of evidence for each unit will be observation of the candidate's performance and knowledge demonstrated during the completion of the unit. This can be supplemented by the following types of physical or documentary evidence:

- Accident books/reporting systems
- Safety records
- Training records
- Audio evidence
- Log books
- Work schedules and records

- Witness testimonies
- Photo/video evidence
- Timesheets
- Work diaries

Please Note that photocopied or downloaded documents such as manufacturers or industry guidance, H&S policies, Risk Assessments etc., are not normally acceptable evidence for GQA qualifications unless accompanied by a record of a professional discussion or assessor statement confirming candidate knowledge of the subject. If you are in any doubt about the validity of evidence, please contact your GQA EQA.

GQA Qualification Implementation Requirements covering Centre Approval, Candidate Assessment and ongoing Quality Assurance

This document indicates the requirements of Approved Centres delivering GQA qualifications and / or units of credit.

1. Equality of Opportunity

Equality of access to fair and valid assessment is necessary for all candidates undergoing assessment. This may mean making reasonable adjustments to normal assessment methods for candidates with particular or special assessment requirements. Candidates work patterns should not become a barrier to assessment, the organisation of which may have to be flexible. In the same way, reasonable adjustment arrangements may be necessary for candidates with a disability. For example, a candidate who is unable, through disability, to produce oral or written evidence, may be allowed to use the method they normally use as a substitute for the required form of communication. Reasonable adjustments need to be approved by GQA.

2. Recognised/Approved Assessment Centres

2.1 Individual centres must be approved by GQA to offer specific qualifications and / or units of credit. A centre may be a single organisation or a partnership of two or more organisations. It may operate at a single location or have satellites. For further details see the GQA booklet "Guide to Centre Approval". The Centre Approval process is carried out by a GQA approved EQA. Each Centre must maintain a centre file. It is important to be clear what the steps in the assessment process are:
• plan evidence collection and opportunities for assessment
• collect evidence
• judge evidence
• determine whether sufficient evidence has been presented
• make an assessment decision and give feedback to the candidate

NB Any deviation from the norm must be approved by a GQA EQA

2.2 Assessors and Verifiers

All Assessors of candidate performance must be competent, to make qualitative judgements, both in the skills they are assessing and in the assessment of candidates and hold the appropriate Assessor national award. Assessor occupational knowledge related to the qualifications being assessed is essential and must be illustrated to GQA prior to approval.

Internal Verifiers are responsible for the quality assurance of the assessment process within a centre. They should have a relevant occupational background, be competent in internal verification and hold the Internal Verifier national award. It is recommended that Internal Verifiers work towards national recognition of assessor competence.

EQAs are responsible for ensuring accurate and consistent standards of assessment across centres, qualifications, units of credit and over time. They should have a relevant occupational background, be competent in external quality assurance and hold the relevant national external quality assurance award. GQA will approve and licence all individuals involved in the assessment and verification of its approved qualifications and / or units of credit. Individuals who are working towards the Assessor or Internal Verifier national awards can only be provisionally licensed. The judgement of provisional licence holders will need to be agreed/authorised by a fully qualified and GQA licensed individual who cannot carry out a dual role in relation to a specific candidate.

All GQA Assessors and Verifiers must undertake a minimum of 2 significant CPD activities in both occupational areas and assessment and verification. Reflective CPD records must be maintained and made available to GQA EQA's for review.

2.3 Centre Approval, Monitoring Reviews and Quality Assurance

The centre recognition/approval process is the start of a significant part of the awarding body's quality assurance system. The Approval process will begin with an EQA review of centre procedures to ascertain the potential centres ability to deliver GQA qualifications and / or units of credit. Centres will be expected to meet the relevant regulatory authority criteria for delivery of qualifications prior to initial approval; continued compliance with the criteria will be monitored through regular EQA visits. It is recommended that centre reviews are conducted at minimum every six months by a GQA EQA.

New or multi-site centres may be required to undertake quarterly or more frequent EV reviews to ensure that different

locations can be seen to satisfy the national requirements.

GQA will ensure that unacceptable barriers relating to the assessment and internal verification of candidates in small companies do not deny recognition of competence to competent young workers. In such circumstances, GQA will demonstrate that its quality assurance procedures remain sufficient and rigorous to ensure that the competence outcomes have standing and credibility in the occupational area.

Enhanced quality procedures to ensure consistency of assessment and verification will be necessary and will include:
• a high level of sampling of assessment decisions N.B. In some instances the EQA may visit each assessment location and qualification / unit of credit candidate (e.g. single candidates dispersed throughout different small companies on government funded programmes)
• an in-depth scrutiny of assessment plans, materials and records
• specific centre guidance aimed at the successful implementation of qualifications and / or units of credit in SMEs via approved centre partnerships. This can include guidance on the quantity and quality of valid, authentic, and transferable evidence expected to be attributed to individual candidates
• ensuring centres are following the requirements prescribed in any appropriate assessment strategies and applicable codes of practice
• the identification and publication of good practice in centres

As part of the Quality Assurance process Proskills require an Enhanced external quality assurance process. This will be in the form of 1 significant underpinning knowledge question answered by the candidate for each unit of the qualification. The questions will be decided by GQA, and guideline answers must be submitted for approval and once approved kept in the Centre File to allow independent assessment

3. Qualification / Unit of Credit Candidates

All candidates must register with a GQA recognised/approved centre. The centre must maintain appropriate candidate personal details for external audit purposes etc.

The centre will provide candidates with advice and guidance on how to prepare for assessment and allocate an Assessor who will assess candidate ability to meet the requirements of the relevant qualifications / unit of credit. It is the candidate's responsibility to demonstrate competence and to do this they must:
• prove they can consistently meet all the qualification and / or unit of credit criteria
• provide evidence from work, that they can perform competently in all the contexts specified in the qualification / unit of credit requirements
• prove that they have the knowledge and understanding required to perform competently, even where they have not provided evidence from the workplace

It is therefore critical that quality evidence is provided in a format to allow the Assessor to make a decision and for the Internal Verifier to audit/verify his/her decision.

4. Evidence

A qualification and / or credit is awarded when a person has achieved the necessary outcomes of the qualification and / or unit of credit.

The specific combination of units necessary to achieve a qualification is detailed in the qualification structure. Certificates of Unit Credit can be awarded when candidates achieve any one, or more, units from the qualification.

The evidence the candidate brings forward is primarily evidence of performance of what he/she can do, not just what he/she knows. The assessment criteria / qualification requirements are described within the qualification and / or unit of credit itself and can incorporate practical skills and knowledge.

The assessor's role is to judge each relevant item of evidence. Each must be judged against the qualification and / or unit of credit requirements. It is not sensible to collect evidence against individual criteria. Nor is it effective. If items of evidence were collected for each of the criteria, the candidate may have to produce many items of evidence, well above the number actually required. GQA recommend holistic assessment.

When judging each item of evidence, the assessor is deciding whether the evidence:
• is authentic – i.e. actually produced by the candidate
• meets the criteria
• relates as appropriate to a context defined within the qualification and / or unit of credit
• confirms that the candidate has the required underpinning knowledge

When the assessor makes a decision about the candidate's competence, he or she examines all the evidence available to determine:
• if the evidence, as a whole, covers all the evidence of achievement
• whether the evidence indicates consistency in competent performance
• whether there is enough evidence on which to base an inference of competence
The answer can only be:
• yes (the candidate is competent)

• no (the candidate is not yet competent)
• there is insufficient evidence to make a decision

Consistency means that the individual is likely to achieve the standard in their work role, in the different activities defined in the qualification and / or unit of credit over time and range of work. The assessor must judge how long a time period is enough to be confident that the candidate can perform reliably to the standard. Unsupported evidence i.e. based on a single assessment/visit will not normally prove consistency.

Performance evidence

Performance evidence can be what the individual actually produces, or the way the individual achieves the standard. One is called product evidence and the other process evidence.
Product evidence is tangible – you can look at it and feel it. Products can be inspected and the candidate can be asked questions about them.

In order to make a fair and objective assessment, the assessor must be able to answer the question: Is there sufficient evidence that the candidate can consistently meet the requirements of the qualification and / or unit of credit?
Process evidence describes the way the candidate has achieved an outcome – how they went about it. This may be, for example, the way the quality of products is checked or the way customer complaints are handled. This usually means observing the candidate in action.
Performance evidence may cover a number of outcomes. It makes sense to plan evidence collection so that what the candidate does, in the normal course of their job, can be related to different outcomes and units. The activities that clearly link to the qualification and / or unit of credit requirements are the things to concentrate on when planning evidence collection and assessment and when monitoring the candidate's progress. Look for opportunities in the candidate's job when evidence can be collected against a number of units at the same time.

Performance evidence can be:
• Naturally occurring – evidence produced in the normal course of work. Evidence of this sort is usually of high quality and reliable. It is also cost effective to collect naturally occurring evidence
• Taken from previous achievements – the candidate may be able to bring forward evidence from previous work experience to show that they are still competent to the standard.
• Evidence of prior achievement can be used when it can be shown to support a judgment that the candidate can still achieve the standard. So, the assessor must be satisfied that the evidence of prior achievement is sufficiently reliable to justify saying that the candidate is currently competent.
• Simulated – from circumstances specially designed to enable the candidate's performance to be assessed. Simulation is generally not acceptable. The exceptions to this are:
     o Dealing with emergencies
     o Dealing with accidents
     o Certain pre-approved real time simulators
     o Limited other procedures that cannot be practically performed in the workplace, and for which sufficient evidence can be collected through other means.

NB:It is not always possible or feasible to collect naturally occurring evidence. It is likely that some simulation may be needed, when it may take too long to wait for the evidence to arise e.g. it may be an aspect of performance which occurs infrequently. An example of this may be evidence of how to deal with emergencies i.e. it makes sense to look for evidence from sources other than naturally occurring ones, rather than for, say, waiting for the building to burn down. Centres must obtain GQA EQA approval prior to the use of simulation.

Knowledge evidence

Being able to achieve a standard requires the ability to put knowledge to work. The qualification and / or unit of credit indicates the knowledge each person should use if they are to perform competently.
It should not be necessary to test all of the candidate's knowledge separately; however, any exception to this would be detailed in the relevant Assessment Strategy. Performance evidence could show that the candidate knows what he or she is doing. When this is not the case, or if the assessor is not convinced from the performance evidence, it may be necessary to check the individual's knowledge separately.

Oral or written assessments must clearly provide a suitable means of checking the breadth and depth of an individual's knowledge. Assessors will need to judge the best mix of knowledge evidence according to individual circumstances. Knowledge evidence is useful when deciding the quality of performance evidence, but must not be used in isolation to judge competence or as an alternative to performance evidence. Care must be taken that candidate evidence is auditable and verifiable.

NB: These Qualification implementation guidelines are generic across the full range of GQA qualifications. Further guidance on acceptable evidence on each qualification will be found in the Introduction to the Qualification section of the candidate booklet

Candidate Declaration

Candidate Name..

Centre/Company Name...

Assessor(s) Name(s)...

I acknowledge receipt of this copy of GQA qualification booklet. The unit structure provides information on which units must be achieved to be awarded the qualification. The individual units detail the necessary requirements etc that I must achieve.

I understand that I will have an important role in preparing for and planning assessments and with guidance from the Assessor I will collect and record relevant evidence.

I have been informed of the appeals system, should I want to appeal against any part of the assessment process.

I understand the assessments will be carried out with regard to the company's/centre's Equal Opportunities Policy.

Candidate signature..

Date...

Production/Process Activity Guideline

To aid new or established workers, a centre may wish to describe a normal production/process activity relevant to the achievement of the national vocational qualification and identify which units/elements it will contribute to, e.g. the act of preparation for work, implementation and completion will contribute to a number of units of competence.

Production/Process Activity Relevant to the Achievement of this Qualification	Contributory to: Units/Elements

H/618/0196	Organise and deliver customer service	Level 3	5 Credits
CS1			

This unit aims to develop the knowledge and skills required to organise and deliver customer service. Candidates will be able to both plan and carry out the delivery of customer service.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to organise customer service delivery	1.1 Explain how different methods of promoting products and/or services impact on customer service delivery			
	1.2 Explain who should be involved in the organisation of customer service delivery			
	1.3 Explain the importance of differentiating between customers' wants, needs and expectations			
	1.4 Explain different ways of segmenting customer groups			
	1.5 Explain how customer segmentation is used in organising customer service delivery			
	1.6 Explain how to analyse the "customer journey"			
2. Be able to plan the delivery of customer service	2.1 Identify customers' needs and expectations			
	2.2 Map the "customer journey"			
	2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service			
	2.4 Prepare the resources needed to deliver products and/or services to different types of customers			
	2.5 Plan how to deal with unexpected additional workloads			
	2.6 Allocate priorities to address points of service failure			
3. Be able to deliver customer service	3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives			
	3.2 Agree realistic and achievable actions with customers			
	3.3 Identify areas for improvement in their own customer service delivery			
	3.4 Adapt their own customer service delivery to meet customers' changing expectations			

Assessor comments

L/618/0466	Understand the customer service environment	Level 3	5 Credits
CS2			

This unit aims to develop knowledge and understanding of the customer service environment. Achieving this unit means the individual will have gained an understanding of the structure of customer service and the key concepts and practices that underpin customer service delivery, including an awareness of the relationship between customer service and a brand, and will also understand the implications of legislation on how customer service is delivered.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the concepts and practices underpinning customer service delivery	1.1 Explain the value of customer service as a competitive tool			
	1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service			
	1.3 Describe techniques used to identify service failures			
	1.4 Explain the concept and importance of the service profit chain			
	1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service			
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to customers and to an organisation			
	2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services			
	2.3 Explain the potential impact of good and poor customer service on a brand			
3. Understand the structure of customer service	3.1 Explain the features of different customer service models and customer service standards			
	3.2 Explain the relationship between customer service and operational areas of an organisation			
	3.3 Explain the relationship between customer service and continuous improvement processes			
	3.4 Explain the costs and benefits of customer service to an organisation			
	3.5 Explain the impact of organisational values on how cus-tomers create their expectations			
4. Understand the implications of legislation on customer service delivery	4.1 Explain the implications of consumer-related legislation on customer service delivery			
	4.2 Explain the implications of confidentiality and data protec-tion legislation for the collection, storage and use of cus-tomer information			

Assessor comments

R/618/0467	Resolve customers' problems	Level 3	4 Credits
CS3			

This unit aims to develop the knowledge and skills required to resolve customers' problems. Achievement of this unit will ensure the individual can select the appropri-ate solution to deal with customers' problems.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the monitoring and resolution of customers' problems	1.1 Assess the suitability of a range of techniques for monitoring customer problems			
	1.2 Explain how to use the resolution of customers' problems to improve products and/or services			
	1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance			
	1.4 Explain the features of negotiating techniques used to resolve customers' problems			
2. Be able to deal with customers' problems	2.1 Confirm the nature and cause of customers' problems			
	2.2 Explain when customers' problems should be treated as complaints			
	2.3 Explain the benefits to customers and the organisation of the options available to solve problems			
	2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems			
	2.5 Explain to customers the options for resolving their problems			
	2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority			
	2.7 Inform colleagues of the nature of problems and actions taken			
	2.8 Evaluate the effectiveness of the resolution of customers' problems			
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems			

Assessor comments

Y/618/0468	Principles of business	Level 3	10 Credits
CS4			

This unit aims to develop knowledge and understanding of business and introduces the key principles of business. Achievement of this unit will ensure the individual un-derstands a range of business principles, including business markets, business innova-tion and growth, and sales and marketing. The unit also requires knowledge of finan-cial management and business budgeting.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand business markets	1.1 Explain the characteristics of different business markets			
	1.2 Explain the nature of interactions between businesses within a market			
	1.3 Explain how an organisation's goals may be shaped by the market in which it operates			
	1.4 Describe the legal obligations of a business			
2. Understand business innovation and growth	2.1 Define business innovation			
	2.2 Explain the uses of models of business innovation			
	2.3 Identify sources of support and guidance for business innovation			
	2.4 Explain the process of product or service development			
	2.5 Explain the benefits, risks and implications associated with innovation			
3. Understand financial management	3.1 Explain the importance of financial viability for an organisation			
	3.2 Explain the consequences of poor financial management			
	3.3 Explain different financial terminology			
4. Understand business budgeting	4.1 Explain the uses of a budget			
	4.2 Explain how to manage a budget			
5. Understand sales and marketing	5.1 Explain the principles of marketing			
	5.2 Explain a sales process			
	5.3 Explain the features and uses of market research			
	5.4 Explain the value of a brand to an organisation			
	5.5 Explain the relationship between sales and marketing			

Assessor comments

D/618/0469	Manage personal and professional development	Level 3	3 Credits
CS5			

This unit aims to develop the knowledge and skills required to manage personal and professional development. Achievement of this unit will ensure the individual will be able to identify personal and professional development requirements and compile and complete a personal and professional development plan ensuring it is maintained and relevant.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity			
	1.2 Identify trends and developments that influence the need for professional development			
	1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation			
2. Be able to fulfil a personal and professional development plan	2.1 Evaluate the benefits of personal and professional development			
	2.2 Explain the basis on which types of development actions are selected			
	2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis			
	2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives			
	2.5 Execute the plan within the agreed budget and timescale			
	2.6 Take advantage of development opportunities made available by professional networks or professional bodies			
3. Be able to maintain the relevance of a personal and professional development plan	3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives			
	3.2 Obtain feedback on performance from a range of valid sources			
	3.3 Review progress toward personal and professional objectives			
	3.4 Amend the personal and professional development plan in the light of feedback received from others			

Assessor comments

R/618/0470	Understand customers and customer retention	Level 3	4 Credits
CS6			

This unit aims to develop knowledge and understanding regarding customers and cus-tomer retention. Achievement of this unit will ensure the individual will have devel-oped an understanding of Customer Relationship Management (CRM), customer re-tention and how to analyse and assess customer satisfaction.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand Customer Relationship Management (CRM)	1.1 Explain the concept of the "customer experience"			
	1.2 Explain different methods of segmenting and characterising customers			
	1.3 Explain the purpose and scope of CRM			
	1.4 Describe the features of an effective CRM system			
	1.5 Explain the uses of CRM data in customer service delivery			
2. Understand customer retention	2.1 Explain the term customer retention			
	2.2 Explain the benefits of customer retention to an organisation			
	2.3 Explain the factors that influence customer retention			
	2.4 Describe techniques used to attract and retain customers			
	2.5 Explain how to assess the extent of customer loyalty			
	2.6 Explain the factors involved in customer recovery			
3. Understand the measurement of customer satisfaction	3.1 Describe techniques used to analyse performance data			
	3.2 Explain the factors to be taken into account in setting performance targets and objectives			
	3.3 Explain the features and uses of a range of techniques to measure customer satisfaction			

Assessor comments

Y/618/0471	Communicate verbally with customers	Level 2	3 Credits
CS7			

This unit aims to develop the knowledge and skills required to communicate verbally with customers. Achievement of this unit will ensure the individual will be able to communicate with customers using appropriate customer service language.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to communicate verbally with customers	1.1 Explain the importance of effective communication in customer service			
	1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience			
	1.3 Explain why "customer service language" is used			
	1.4 Describe different questioning techniques that can be used when communicating with customers			
	1.5 Describe verbal and non-verbal signals that show how a customer may be feeling			
2. Be able to use customer service language to communicate with customers	2.1 Identify customers' wants and priorities			
	2.2 Listen "actively" to what customers are saying			
	2.3 Communicate clearly, concisely and professionally with customers			
	2.4 Use a tone of voice and expression that reinforces messages when communicating with customers			
	2.5 Use language that reinforces empathy with customers			
	2.6 Adapt their response in accordance with customers' changing behaviour			
	2.7 Provide information and advice that meets customers' needs			
	2.8 Maintain organisational standards of behaviour and communication when interacting with customers			
	2.9 Check that customers have understood what has been communicated			
	2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers			

Assessor comments

D/618/0472	Communicate with customers in writing	Level 2	3 Credits
CS8			

This unit aims to develop the knowledge and skills required to communicate with cus-tomers in writing-this could be any or all of, letters, email, online forums. Achieve-ment of this unit will ensure the individual is competent in planning and producing written communications.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes			
	1.2 Describe practices for producing different forms of written communications			
	1.3 Describe the potential benefits and limitations associated with communicating with customers in writing			
	1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing			
2. Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication			
	2.2 Gather the information needed to draft the communication			
	2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer			
3. Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone			
	3.2 Use language that is clear and concise, adapting it to meet identified customer needs			
	3.3 Record decisions and actions taken and the reasons for them			
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing			

Assessor comments

H/618/0473	Exceeed customer expectations	Level 2	3 Credits
CS9			

This unit aims to develop the knowledge and skills required to exceed customer expectations. This includes an understanding of, and adherence to, relevant legislation and organisational policies and procedures and that the work is carried out within own authority levels.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive			
	1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer			
	1.3 Explain the types of actions that customers are likely to perceive as adding value			
	1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer			
2. Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer			
	2.2 Explain the service offer clearly and concisely to customers			
	2.3 Identify options that offer added value without affecting other customers adversely			
	2.4 Make offers to customers within their own authority levels			
	2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer			
	2.6 Record agreements made and actions taken			

Assessor comments

K/618/0474	Promote additional products and/or services to customers	Level 2	2 Credits
CS10			

This unit aims to develop the knowledge and skills required to promote additional products and/or services to customers. Achievement of this unit will ensure the indi-vidual adheres to organisational policies and procedures, legal and ethical requirements.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services			
	1.2 Explain the importance of keeping product/service knowledge up to date			
	1.3 Explain how to match products and/or services to customer needs			
	1.4 Describe techniques to promote additional products and/or services			
2. Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience			
	2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers			
	2.3 Provide information to customers that will help them to decide whether to select additional products and/or services			
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services			

Assessor comments

M/618/0475	Deliver customer service while working on customers' premises	Level 2	4 Credits
CS11			

This unit aims to develop the knowledge and skills required to deliver customer ser-vice whilst working on customers' premises, following safe working practices

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit			
	1.2 Explain the importance of being positive about the product and/or service			
	1.3 Explain organisational standards of presentation, behaviour and communication			
	1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed			
	1.5 Explain how to identify possible risks relating to the work to be carried out			
	1.6 Explain the way in which legislation affects the work to be carried out			
2. Be able to deliver customer service whilst working on customers' premises	2.1 Identify themselves to customers			
	2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises			
	2.3 Confirm with customers the nature of work to be carried out on their premises			
	2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed			
	2.5 Treat customers, their premises and property with consideration			
	2.6 Confirm that the customer is satisfied with the outcome			
	2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises			

Assessor comments

T/618/0476	Deliver customer service to challenging customers	Level 2	3 Credits
CS12			

This unit aims to develop the knowledge and skills required to identify and understand how to deal with challenging customers to deliver customer service in accordance with organisational policies and procedures, legal and ethical requirements. Achievement of this unit will ensure the individual works within their own authority limits and when and how to escalate matters.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment			
	1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers			
	1.3 Explain behaviours that make it challenging to deal with customers			
	1.4 Explain the difference between assertive and aggressive behaviour			
	1.5 Describe techniques to deal with customers' challenging behaviour			
	1.6 Explain their own levels of authority for agreeing actions outside the service offer			
	1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters			
2. Be able to deal with challenging customers	2.1 Identify the signs that indicate that a customer is challenging			
	2.2 Express understanding of customers' point of view without admitting liability			
	2.3 Explain to customers the limits of the service they can offer			
	2.4 Explain to customers the reasons for an organisation's position and policy			
	2.5 Agree a way forward that balances customer satisfaction and organisational needs			
	2.6 Obtain help from colleagues when options for action are beyond their level of authority			
	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers			

Assessor comments

A/618/0477	Develop customer relationships	Level 2	3 Credits
CS13			

This unit aims to develop the knowledge and skills required to develop effective working relationships with customers. Achievement of this unit will ensure the individual can give help, advice, information that meets or exceeds customer expectations.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers			
	1.2 Explain the value of customer loyalty and retention			
	1.3 Explain how customers' expectations may change over time			
	1.4 Explain the use of customer feedback as a means of developing customer relationships			
	1.5 Explain the limits of their own authority to make alternative service offers to customers			
	1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations			
	1.7 Explain the importance of regular communication in the development of both internal and external customer relationships 2			
2. Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations			
	2.2 Identify new ways of helping customers based on their feedback			
	2.3 Share feedback from customers with others			
	2.4 Identify added value that the organisation could offer customers			
	2.5 Bring to customers' attention products or services that may interest them			

Assessor comments

F/618/0478	Support customer service improvements	Level 2	3 Credits
CS14			

This unit aims to develop the knowledge and skills required to support the introduc-tion and implementation of customer service improvements. The unit also includes the need to be able to identify the impact of improvements and feedback on this to relevant stakeholders.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to support customer service improvements	1.1 Describe different sources of information that may help identify ways of improving customer service			
	1.2 Describe the constraints on suggesting improvements to customer service			
	1.3 Explain the limits of their own authority in implementing improvements			
2. Be able to identify the potential for improvements to customer service	2.1 Use information from a range of sources to understand the customer experience			
	2.2 Identify potential areas where customer service could be improved from an analysis of information			
	2.3 Make recommendations for improvement that are based on evidence from analysed information			
3. Be able to support the implementation of improvements to customer service	3.1 Implement agreed improvements within the limits of their own authority			
	3.2 Inform customers of improvements to customer service			
	3.3 Identify the impact of improvements to customer service and feedback to relevant people			

Assessor comments

J/618/0479	Support customers through real-time online customer service	Level 2	3 Credits
CS15			

This unit aims to develop the knowledge and skills required to support customers through real-time online customer service-this could include, but is not limited to, any or all of automated online assistance, instant messages and technical support

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to support customers through realtime online customer service	1.1 Explain how an organisation's online customer service system works			
	1.2 Explain how to navigate their own customer service site			
	1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services			
	1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems			
2. Be able to establish the customer service support needed by customers	2.1 Identify customers' familiarity with the site			
	2.2 Identify the difficulties faced by customers when navigating websites			
	2.3 Identify the support for customers that will meet their needs			
3. Be able to support online customer service in realtime	3.1 Step through screen sequences while the customer operates the system			
	3.2 Communicate with customers in terms they can understand			
	3.3 Inform customers of what is happening and why certain steps are required			
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service			

Assessor comments

A/618/0480	Use social media to deliver customer service	Level 2	3 Credits
CS16			

This unit aims to develop the knowledge and skills required to deliver customer service through the use of social media, this includes, but is not limited to, any or all of Twitter, Facebook and online forums, to monitor, post and respond. Achievement of this unit will ensure the individual follows organisational policy, legal and ethical requirements and etiquette when using social media.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand social media in a business environment	1.1 Explain how different social media platforms can be used for customer service			
	1.2 Describe different audience groups for a range of social media platforms			
	1.3 Explain the importance of monitoring customer posts in social media networks			
	1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes			
	1.5 Explain the etiquette of communication within different social media platforms			
	1.6 Explain the importance of security settings and how they are used on different social media platforms			
	1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media			
2. Be able to deal with customers using social media	2.1 Monitor social media to identify customer questions, requests and comments			
	2.2 Make responses that are appropriate to posts made by customers on social media networks			
	2.3 Take action to ensure that customers are satisfied before closing dialogue			
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media			

Assessor comments

F/618/0481	Negotiate in a business environment	Level 2	4 Credits
CS17			

This unit aims to develop the knowledge and skills required to negotiate with others following organisational policies and procedures, and legal and ethical requirements. Achievement of this unit will ensure the individual can prepare a negotiating strategy considering the purpose, scope and range of negotiations in accordance with own limits on authority and any cultural differences that may affect the negotiations.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy			
	1.2 Explain the use of different negotiation techniques			
	1.3 Explain how research on the other party can be used in negotiations			
	1.4 Explain how cultural differences might affect negotiations 2			
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation			
	2.2 Explain the scope of their own authority for negotiating			
	2.3 Prepare a negotiating strategy			
	2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities			
	2.5 Assess the likely objectives and negotiation stances of the other party			
	2.6 Research the strengths and weaknesses of the other party			
3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities			
	3.2 Adapt the conduct of the negotiation in accordance with changing circumstances			
	3.3 Maintain accurate records of negotiations, outcomes and agreements made			
	3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations			

Assessor comments

M/618/0489	Promote equality, diversion and inclusion in the workplace	Level 3	3 Credits
CS18			

This unit aims to develop the knowledge and skills required to promote equality, diversity and inclusion in the workplace. Achievement of this unit will ensure the individual understands the differences in these, the organisational policy and potential consequences of non-compliance.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1 Explain the difference between equality, diversity and inclusion			
	1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy			
	1.3 Explain the potential consequences of breaches of equality legislation			
	1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion			
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1 Explain the different forms of discrimination and harassment			
	2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace			
	2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace			
3. Be able to support equality, diversity and inclusion in the workplace	3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace			
	3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace			
	3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace			

Assessor comments

H/618/0490	Manage individuals' performance	Level 3	4 Credits
CS19			

This unit aims to develop the knowledge and skills required to manage the performance of individuals. Achievement of this unit will ensure an understanding how to identify and address underperformance and discuss and agree a course of action to address this and delegate appropriate responsibilities. Additionally, the unit requires proof of competency to support, monitor, motivate and recognise the progress of individuals.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance			
	1.2 Explain how to identify causes of underperformance			
	1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively			
	1.4 Explain how to address issues that hamper individuals' performance			
	1.5 Explain how to agree a course of action to address underperformance			
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives			
	2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs			
	2.3 Apply motivation techniques to maintain morale			
	2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards			
	2.5 Monitor individuals' progress towards objectives in accordance with agreed plans			
	2.6 Recognise individuals' achievement of targets and quality standards			
	2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace			

Assessor comments

K/618/0491	Manage diary systems	Level 2	2 Credits
CS20			

This unit aims to develop the knowledge and skills required to manage diary systems. Achievement of this unit will ensure the individual understands the importance of keeping diaries accurate and up to date, including responding to changes in a way that balances the needs of those involved or affected and can provide clear communication to relevant parties, respecting the need for confidentiality where required.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand the management of diary systems	1.1 Explain the importance of keeping diary systems up to date			
	1.2 Describe the basis on which bookings and changes are prioritised			
	1.3 Explain any constraints relating to making bookings for people or facilities			
	1.4 Describe the types of problems that can occur when managing diaries			
2. Be able to manage diary systems	2.1 Obtain the information needed to make diary entries			
	2.2 Make accurate and timely diary entries			
	2.3 Respond to changes in a way that balances and meets the needs of those involved			
	2.4 Communicate up-to-date information to everyone involved			
	2.5 Keep diaries up-to-date			
	2.6 Maintain the requirements of confidentiality			

Assessor comments

M/618/0492	Contribute to the organisation of an event	Level 2	3 Credits
CS21			

This unit aims to develop the knowledge and skills required to contribute to event organisation. This includes awareness of the roles and responsibilities of others, identifying venue and resource requirements , typical problems and potential solutions and how to distribute pre-event information and documentation. Achievement of this unit will ensure the individual understands the Health and Safety aspects of the event, how to set up the event and how to carry out post event activities in accordance with the event plan and agreements made.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event			
	1.2 Explain the purpose and features of different types of events			
	1.3 Describe the type of resources needed for different types of events			
	1.4 Describe the different needs attendees may have and how to meet these			
	1.5 Explain the requirements of health, safety and security when organising events			
	1.6 Describe the types of problems that may occur during events and how to deal with them			
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event			
	2.2 Obtain resources within the agreed timescales			
	2.3 Distribute pre-event documentation to delegates in accordance with the event plan			
	2.4 Co-ordinate attendee responses within the agreed timescale			
	2.5 Identify any special requirements of event attendees			
3. Be able to set up an event	3.1 Set up layout and resources in accordance with the event plan			
	3.2 Confirm that all identified resources are in place and meet requirements			
	3.3 Behave in a way that maintains organisational values and standards			
4. Be able to carry out post-event actions	4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract			
	4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event			

Assessor comments

T/618/0493	Provide Reception services	Level 2	3 Credits
CS22			

This unit aims to develop the knowledge and skills required to carry our reception duties in accordance with organisational procedures and Health and Safety requirements. Reception duties include, but are not limited to welcoming visitors, providing them with relevant information and completing records in accordance with organisational procedures.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No			
1. Understand reception services	1.1 Explain the receptionist's role in representing an organisation				
	1.2 Explain an organisation's structure and lines of communication				
	1.3 Describe an organisation's standards of presentation				
	1.4 Explain the health, safety and security implications of visitors to a building				
	1.5 Explain how to deal with challenging people				
2. Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards				
	2.2 Direct visitors to the person they are visiting in accordance with organisational standards				
	2.3 Record visitors' arrivals and departures in accordance with organisational procedures				
	2.4 Provide advice and accurate information within organisational guidelines on confidentiality				
	2.5 Keep the reception area tidy and materials up-to-date				
	2.6 Answer and deal with telephone calls within organisational standards				
	2.7 Adhere to organisational procedures on entry, security, health and safety				

Assessor comments

A/618/0494	Processing sales orders	Level 2	2 Credits
CS23			

This unit aims to develop the knowledge and skills required to process sales orders. Achievement of this unit will ensure the individual understands how to obtain, interpret and process sales orders and associated information, e.g. credit checks, product availability, authorisation requirements and communication of the information to relevant parties. The individual will also understand and comply with security aspects of sales information and orders.

Learning outcome. The learner will:	Assessment criteria. The learner can:	Evidence.Ref.No		
1. Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing			
	1.2 Describe organisational processes for ordering products and/or services			
	1.3 Describe different sources of information used to check customer credit			
	1.4 Describe the different payment methods accepted by sales orientated organisations			
	1.5 Explain the role of the despatch function			
	1.6 Describe service standards relating to sales order completion			
	1.7 Explain the importance of storing information securely			
2. Be able to process sales orders	2.1 Identify customer sales order requirements			
	2.2 Check that the credit status of the customer meets organisational standards			
	2.3 Confirm the availability of products and/or services to the customer			
	2.4 Ensure that information given to the customer about delivery, timing and price is accurate			
	2.5 Ensure that the sale is authorised following the organisation's procedures			
	2.6 Finalise the transaction in accordance with organisational procedures			
	2.7 Ensure that the customer is aware of the terms and conditions of sale			
	2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders			
	2.9 Identify who to go to when in need of support with sales order processing problems			
3. Be able to follow up sales order processing	3.1 Keep the customer informed of the sales order progress and any problems with the sale order			
	3.2 Advise the customer of current discounts and special offers			
	3.3 Check all information is stored securely			

Assessor comments

Notes

Notes