Qualification Specification

Highfield Level 1 NVQ Award in Contact Centre Operations (RQF)

Qualification Number: 601/4784/2

Version 1.2   July 2018

Contents

Highfield Level 1 NVQ Award in Contact Centre Operations (RQF)

Introduction

This qualification specification is designed to outline all you need to know to offer this qualification at your centre. If you have any further questions, please contact your account manager.

Qualification regulation and support

The Highfield Level 1 NVQ Award in Contact Centre Operations (RQF) has been developed and is awarded by Highfield Qualifications and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual and CCEA Regulation. It is also regulated by Qualifications Wales.

Key facts

Qualification number:	601/4784/2
Learning aim reference:	60147842
Credit value:	12
Assessment method:	Portfolio of evidence
Guided learning hours (GLH):	35
Total qualification time (TQT):	120

Qualification overview and objective

The objective of this qualification is to prepare learners for employment in the contact centre industry. The qualification provides learners with the knowledge, understanding and skills needed to work in this sector.

It covers the following topics

- Improve personal effectiveness at work in a contact centre and
- Comply with health and safety procedures in a contact centre

Learners can also select units such as

- Communicate information to customers through a contact centre
- Contribute to sales activities in a contact centre and
- Recognise and deal with customer queries, requests and problems

Entry requirements

To register for this qualification, learners are required to be aged 14 years or above.

In addition to the above, Highfield Qualifications recommends that all learners applying for the qualification should be initially assessed by the centre to ensure that they have a fair opportunity to demonstrate their ability to undertake the qualification. Centres can then use this assessment to tailor programmes to meet their individual needs. This assessment can also identify and recognise prior qualifications and experience, where appropriate.

Geographical coverage

This qualification is suitable for delivery in England, Wales and Northern Ireland.

Centre requirements

To effectively deliver this qualification, centres must be able to provide realistic working environments to ensure that the practical assessment criteria can be fully met. Centres need to ensure that these realistic working environments replicate the key characteristics of the workplaces in which the skill to be assessed is normally employed.

If centres provide underpinning knowledge lessons in the classroom, they must ensure the room has suitable seating and desks.

Guidance on delivery

The total qualification time for this qualification is 120 hours. Of this 35 hours are recommended as guided learning hours.

TQT is an estimate of the total number of hours it would take an average learner to achieve and demonstrate the necessary level of attainment to be awarded with a qualification, both under direct supervision (forming guided learning hours) and without supervision (all other time). TQT and GLH values are advisory and assigned to a qualification as guidance.

Guidance on assessment

This qualification is assessed by a portfolio of evidence. Assessors must ensure that the learner's portfolio sufficiently covers all learning outcomes and assessment criteria as defined in each unit of the qualification. The evidence collected to make up the portfolio will be in a variety of formats such as observation, witness testimonies and products of work.

Highfield provide a learner pack which is available to download from the members area of the Highfield website.

Centres must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Guidance on quality assurance

Highfield Qualifications require centres to have in place a robust mechanism for internal quality assurance. Internal quality assurance must be completed by an appropriately qualified person and that person must not have been involved in any aspect of the delivery or assessment of the course they are quality assuring.

Highfield Qualifications will support centres by conducting ongoing engagements to ensure and verify the effective and efficient delivery of the qualification.

Recognition of prior learning (RPL)

Centres may apply to use recognition of prior learning or prior achievement to reduce the amount of time spent in preparing the learner for assessment.

For further information on how centres can apply to use RPL as described above, please refer to the Recognition of Prior Learning (RPL) Policy in the members' area of the Highfield Qualifications

website. This policy should be read in conjunction with this specification and all other relevant Highfield Qualifications documentation.

Assessor requirements

Highfield Qualifications recommends nominated assessors for this qualification to meet the following:

- have experience/competence in contact centre operations, e.g. evidence they have the relevant knowledge/competence/experience related to the units they are responsible for assessing
- hold, or be working towards, a recognised assessing qualification, which could include any of the following:
  - A1
  - D32, D33
  - Level 3 Award in Assessing Competence in the Work Environment
- maintain appropriate continued professional development for the subject area

Internal quality assurance (IQA) requirements

Highfield Qualifications recommends internal quality assurers for this qualification to meet the following:

- be occupationally competent and knowledgeable in contact centre operations
- hold, or be working towards, a recognised internal quality assurance qualification, which could include any of the following:
  - D34
  - V1
  - Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice
- maintain appropriate continued professional development for the subject area

Mapping to National Occupational Standards (NOS)

This qualification maps to the following National Occupational Standards (NOS):

- Instructus Skills Contact Centre National Occupational Standards.

Reasonable adjustments and special considerations

Highfield Qualifications has measures in place for learners who require additional support. Please refer to Highfield Qualifications' Reasonable Adjustments Policy for further information/guidance.

ID requirements

It is the responsibility of the centre to have systems in place to ensure that the person taking an assessment is indeed the person they are claiming to be. All centres are therefore required to ensure that each learner's identification is checked before they undertake the assessment. Highfield Qualifications recommends the following as proof of a learner's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence

- a valid warrant card issued by HM forces or the police
- another photographic ID card, e.g. employee ID card, student ID card, travel card etc.

If a learner is unable to produce any of the forms of photographic identification listed above, a centre may accept another form of identification containing a signature, for example, a credit card. Identification by a third-party representative, such as a line manager, human resources manager or invigilator, will also be accepted.

For more information on learner ID requirements, please refer to Highfield Qualifications' Core Manual.

Progression opportunities

On successful completion of this qualification, learners may wish to continue their development by undertaking one of the following qualifications:

- Highfield Level 2 Award in Customer Service
- Highfield Level 2 Diploma in Customer Service
- Highfield Level 3 Diploma in Customer Service

Appendix 1: Qualification structure

To complete the Highfield **Level 1 NVQ Award in Contact Centre Operations,** learners must complete the following:

- **all units** contained within the mandatory group
- a **minimum of 3 credits** from units in optional group A
- The remaining **3 credits** can come from units in either optional group A or optional group B

Mandatory group
Learners must achieve **all units** in this group

Unit reference	Unit title	Level	GLH	Credit
T/503/0342	Improve personal effectiveness at work in a contact centre	2	15	4
D/503/0352	Comply with health and safety procedures in a contact centre	1	9	2

Optional group A
Learners must achieve a minimum of **3 credits** from this group

Unit reference	Unit title	Level	GLH	Credit
J/503/0412	Work with others to support customers in a contact centre	1	10	3
D/503/0402	Communicate information to customers through a contact centre	1	10	4
F/503/0392	Contribute to sales activities in a contact centre	1	6	3
Y/503/0382	Contribute to customer service in a contact centre	1	5	3
F/503/0361	Use specific features of contact centre systems and technology	1	12	3

Optional group B
Learners may achieve **3 credits** from this group

Unit reference	Unit title	Level	GLH	Credit
A/502/4395	Bespoke software	1	15	2
J/502/4299	Using email	1	15	2
A/502/4378	Using collaborative technologies	1	20	3
J/502/8577	Selling by telephone - inbound	2	27	4
J/502/8580	Selling by telephone - outbound	2	27	4
R/601/1209	Maintain a positive and customer-friendly attitude	1	33	5
F/601/1609	Communicate using customer service language	1	30	4
M/601/1508	Recognise and deal with customer queries, requests and problems	1	33	5

T/601/1509	Take details of customer service problems	1	27	4
R/601/1548	Develop your own customer service skills through self-study	2	40	6
Y/502/4291	IT communication fundamentals	1	15	2
T/502/4296	Using the internet	1	20	3

Appendix 2: Qualification content

Unit 1: Improve personal effectiveness at work in a contact centre
Unit number: T/503/0342
Credit: 4
GLH: 15
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to assess personal effectiveness in a contact centre	1.1 Identify strengths and areas for development in skills and knowledge against agreed criteria 1.2 Agree learning actions that address priority learning and personal development needs
2. Be able to carry out development activities to improve personal effectiveness in a contact centre	2.1 Participate in programme of learning activities that supports personal development needs 2.2 Use feedback from participation in the agreed development activities to improve personal performance
3. Be able to work with others in a contact centre team to improve personal performance	3.1 Identify how everyday work in a team leads to learning and personal development 3.2 Participate in team tasks that provide on-the-job learning opportunities 3.3 Use feedback on personal performance to plan further learning steps
4. Understand how to improve personal effectiveness in a contact centre	4.1 Describe the organisational procedures and guidelines for contact centre tasks defined by their job role 4.2 Describe the range of products and/or services offered or supported by the contact centre 4.3 Describe the impact of legislation and/or regulations on their role within the contact centre

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	4.4 Explain the importance of using development activities that are relevant to identified business needs
	4.5 Explain different sources of feedback to the personal development process
	4.6 Explain the importance of feedback to the personal development process
	4.7 Explain the importance of involving a person in authority in making a personal development plan

Unit 2: Comply with health and safety procedures in a contact centre
Unit number: D/503/0352
Credit: 2
GLH: 9
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to comply with organisational health and safety procedures in a contact centre	1.1 Identify the health and safety procedures relevant to the job role 1.2 Follow organisational health and safety procedures and techniques at all times 1.3 Follow the organisational and the manufacturer's instructions for the use of equipment and tools
2. Be able to minimise health and safety risks relating to the job role in a contact centre	2.1 Identify the health and safety risks relevant to the job role 2.2 List the job role duties and responsibilities for minimising health and safety risks 2.3 Keep the work area clean and tidy in accordance with organisational requirements 2.4 Identify the actions to be taken if health and safety risks are not being minimised
3. Understand the principles of health and safety in a contact centre	3.1 State how health and safety procedures affect their job role 3.2 Explain the purpose and use of safety-related equipment 3.3 Explain how to lift and handle heavy objects safely 3.4 Describe the health and safety hazards relevant to the job role 3.5 Describe common health and safety standards in the workplace including excessive noise, prolonged use of display screens and hazardous substances 3.6 Explain why it is important to keep the work area clean and tidy 3.7 State the difference between hazard and risk in the work area

Unit 3: Work with others to support customers in a contact centre
Unit number: J/503/0412
Credit: 3
GLH: 10
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to establish and validate customers' identities in a contact centre	1.1 Use agreed greetings and openings for customer conversations 1.2 Link customers' identity with organisational records 1.3 Confirm customers' identity and authority in accordance with organisational procedures 1.4 Inform customers of what can or can
2. Be able to communicate information about specified products and/or services in a contact centre	2.1 Establish the products and/or services about which customers need information 2.2 Give customers a summarised introduction to requested products and/or services 2.3 Deal with customers within the agreed limits of what can be handled 2.4 Conclude a customer contact in accordance with organisational procedures
3. Be able to hand over customer contacts to others in a contact centre	3.1 Refer customers elsewhere when they require information outside their limits of authority or knowledge 3.2 Explain to customers why and how they will be passed to someone else in accordance with organisational procedures 3.3 Provide as much information as possible about the customer contact prior to recording the contact
4. Understand how support for customers in a contact centre is provided	4.1 List the products and/or services offered or supported by the contact centre 4.2 List the regulations and/or legislation that has an impact on customers 4.3 Explain how to use communication

Learning Outcomes	Assessment Criteria
The learner will	**The learner can**
	equipment for dealing with customer contacts
	4.4 State how and when to escalate a customer contact
	4.5 Describe the listening and questioning techniques to establish the information needed by customers

Unit 4: Communicate information to customers through a contact centre
Unit number: D/503/0402
Credit: 4
GLH: 10
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to talk to customers on a familiar subject in a contact centre	1.1 Greet customers in accordance with organizational guidelines
	1.2 Describe the products and/or services to customers in accordance with organisational guidelines
	1.3 Speak to customers in a way that makes them feel confident about what is being said
	1.4 Use positive language when describing products and/or services
2. Be able to communicate in writing on a familiar subject in a contact centre	2.1 Complete written communications to customers in accordance with organisational guidelines
	2.2 Present written communications with customers in formats that comply with organisational guidelines
	2.3 Confirm that written communications are grammatically correct; spelled correctly and in house style before sending
3. Understand how to communicate with customers in a contact centre	3.1 State the products and/or services offered or supported by the contact centre
	3.2 List the organisational requirements and/or regulations about what can and cannot be expressed to customers verbally and/or in writing
	3.3 State what information is best given to customers verbally and what is best given in writing
	3.4 Explain the difference between positive and negative language when communicating with customers verbally and/or in writing
	3.5 Explain how to demonstrate "active

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	listening"

Unit 5: Contribute to sales activities in a contact centre
Unit number: F/503/0392
Credit: 3
GLH: 6
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to gather and use specified sales information in a contact centre	1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures
	1.2 Provide information to customers about products and/or services in accordance with organizational procedures
	1.3 Collect from customers information that supports potential sales in accordance with organizational procedures
	1.4 Check with customers the accuracy of the information provided
	1.5 Keep records of customers in accordance with organisational procedures
2. Be able to make direct sales to customers through a contact centre	2.1 Identify customers in accordance with organizational procedures
	2.2 Establish customers' needs for potential sales of products and/or services within their level of authority
	2.3 Check with customers the accuracy of the order
	2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority
	2.5 Complete the authorisation or payment in accordance with organisational procedures
3. Understand sales activities in a contact centre	3.1 List the products and/or services offered or supported by the contact centre
	3.2 List the regulations and/or legislation that has an impact on dealing with customers
	3.3 State the organisational procedures for processing sales and payments and/or

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	establishing order authority with customers

Unit 6: Contribute to customer service in a contact centre
Unit number: Y/503/0382
Credit: 3
GLH: 5
Level: 1

Learning Outcomes	Assessment Criteria	
The learner will	*The learner can*	
1. Be able to meet customer expectations in a contact centre	1.1	Greet customers in accordance with organizational guidelines
	1.2	Provide requested information about products and/or services
	1.3	Check the customer's understanding of the information provided
	1.4	Close the customer contact in accordance with organisational guidelines
2. Be able to meet organizational and regulatory requirements during customer contact	2.1	Deal with customers within organisational and regulatory restrictions
	2.2	Explain to customers the limitations of the information that can be provided
	2.3	Meet customer expectations of respect and politeness when delivering service within defined limits
3. Be able to gather specified customer satisfaction information in a contact centre	3.1	Identify the customer satisfaction questions that should be asked
	3.2	Ask customers specified questions about their level of satisfaction with service through the contact centre
	3.3	Record responses to customer satisfaction in accordance with organisational guidelines
4. Understand the purpose of customer service in a contact centre	4.1	List the products and/or services offered or supported by the contact centre
	4.2	Explain how customer satisfaction can be influenced by behaviour toward the customer
	4.3	State the organisational requirements and regulation and/or legislation that place limits

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	on the customer service that can be provided
	4.4 State to whom to refer dissatisfied customers.

Unit 7: Use specific features of contact centre systems and technology
Unit number: F/503/0361
Credit: 3
GLH: 12
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Be able to use contact centre systems and technology to carry out customer contact tasks	1.1 Log into the technology system that is appropriate for dealing with customer contacts
	1.2 Follow defined pathways through the system to complete customer contact tasks
	1.3 Use features of the technology contact handling system to control customer contacts
	1.4 Locate information on the system needed to complete a customer contact
	1.5 Identify to whom to refer when the customer contact cannot be completed
	1.6 Input information into the system in accordance with organisational procedures
	1.7 Validate the customer's identity from information given and information held on the system
2. Understand contact centre systems and technology	2.1 State the organisational procedures and guidelines for handling customer contacts
	2.2 List the products and/or services offered or supported by the contact centre
	2.3 List the regulation and/or legislation relevant to the contact centre's work with customers
	2.4 State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle
	2.5 State the procedures for logging onto the technology systems
	2.6 State how to respond to prompts from the system indicating the pathway to be followed
	2.7 State how to use systems and technology to handle customer contacts
	2.8 Identify the categories of customer contacts

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	that they are authorised to handle

Unit 8: Bespoke Software
Unit number: A/502/4395
Credit: 2
GLH: 15
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Input, organise and combine information using bespoke software	1.1 Input relevant information accurately into existing templates and/or files so that it is ready for processing
	1.2 Organise and combine information of different forms or from different sources
	1.3 Follow local and/or legal guidelines for the storage and use of data where available
	1.4 Respond appropriately to data entry error messages
2. Use tools and techniques to edit, process, format and present information	2.1 Use appropriate tools and techniques to edit, process and format information
	2.2 Check information meets needs, using IT tools and making corrections as appropriate
	2.3 Use appropriate presentation methods and accepted layouts

Unit 9: Using Email
Unit number: J/502/4299
Credit: 2
GLH: 15
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Use e-mail software tools and techniques to compose and send messages	1.1 Use software tools to compose and format e-mail messages
	1.2 Attach files to e-mail messages
	1.3 Send e-mail messages
	1.4 Identify how to stay safe and respect others when using e-mail
	1.5 Use an address book to store and retrieve contact information
2. Manage incoming email effectively	2.1 Follow guidelines and procedures for using e-mail
	2.2 Identify when and how to respond to e-mail messages
	2.3 Read and respond to e-mail messages appropriately
	2.4 Identify what messages to delete and when to do so
	2.5 Organise and store e-mail messages
	2.6 Respond appropriately to common e-mail problems

Unit 10: Using Collaborative Technologies
Unit number: A/502/4378
Credit: 3
GLH: 20
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Stay safe and secure when using collaborative technology	1.1 Follow guidelines for working with collaborative technology
	1.2 Identify risks in using collaborative technology and why it is important to avoid them
	1.3 Carry out straightforward checks on others' online identities and different types of information
	1.4 Identify when and how to report online safety and security issues
	1.5 Identify what methods are used to promote trust
2. Set up and access IT tools and devices for collaborative working	2.1 Set up IT tools and devices that will enable you to contribute to collaborative work
	2.2 Identify the purpose for using collaborative technologies and expected outcomes
	2.3 Identify which collaborative technology tools and devices to use for different communication media
	2.4 Identify what terms and conditions apply to using collaborative technologies
3. Prepare collaborative technologies for use	3.1 Use given details to access collaborative technologies needed for a collaborative task
	3.2 Adjust basic settings on collaborative technologies
	3.3 Change the environment of collaborative technologies
	3.4 Set up and use a data reader to feed information
	3.5 Identify what and why permissions are set to allow others to access information

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
4. Contribute to tasks using collaborative technologies	4.1 Contribute responsibly and actively to collaborative working 4.2 Contribute to producing and archiving the agreed outcome of collaborative working 4.3 Identify when there is a problem with collaborative technologies and where to get help 4.4 Respond to simple problems with collaborative technologies

Unit 11: Selling by telephone - inbound
Unit number: J/502/8577
Credit: 4
GLH: 27
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Understand how to sell by telephone (inbound)	1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls
	1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons
	1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls
	1.4 Describe the different methods used to sell benefits during inbound telephone sales calls
2. Understand how to close the sale during inbound telephone sales calls	2.1 Explain how to manage customer behaviour during inbound telephone sales calls
	2.2 Describe methods for closing sales during inbound telephone sales calls
	2.3 Explain how to evaluate and measure the success of inbound telephone sales calls
	2.4 Describe interactive ICT options available to support telephone sales activities
3. Be able to prepare for the inbound telephone sales call	3.1 Identify objectives for selling products and/or services by inbound telephone sales calls
	3.2 Organise materials for a call in accordance with the sales call plan
4. Be able to identify customer needs during inbound telephone sales calls	4.1 Greet and respond to callers in accordance with organisational procedures
	4.2 Obtain information from customers about their needs
	4.3 Assess the potential value of calls and customers
	4.4 Identify products and/or services with

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	features and functions that customers need or want
	4.5 Identify opportunities for further sales and/or sales of other products and/or services

Unit 12: Selling by telephone - outbound
Unit number: J/502/8580
Credit: 4
GLH: 27
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Understand how to sell by telephone (outbound)	1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls
	1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons
	1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls
	1.4 Describe the different methods used to sell benefits during outbound telephone sales calls
2. Understand how to close the sale during outbound telephone sales calls	2.1 Explain how to manage customer behaviour during outbound telephone sales calls
	2.2 Describe methods for closing sales during outbound telephone sales calls
	2.3 Explain how to evaluate and measure the success of outbound telephone sales calls
	2.4 Describe interactive ICT options available to support telephone sales activities
3. Be able to prepare for the inbound telephone sales call	3.1 Identify objectives for selling products and/or services by outbound telephone sales calls
	3.2 Use agreed call lists or leads to plan sales calls
	3.3 Organise materials for the call in accordance with the sales call plan
4. Be able to identify customer needs during outbound telephone sales calls	4.1 Assess the potential value of calls and customers
	4.2 Prioritise calls according to likely customer

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	value and probability of closure
	4.3 Obtain information from customers about their needs
	4.4 Identify products and/or services with features and functions that customers need or want
	4.5 Identify opportunities for further sales and/or sales of other products and/or services
5. Be able to present products and/or services to the customer during outbound telephone sales calls	5.1 Explain the benefits and features of products and or services offered
	5.2 Interpret the customer's preferred solution and decide how to progress the sale
6. Be able to deal with sales objections during outbound telephone sales calls	6.1 Identify likely sales objections prior to dealing with the customer
	6.2 Clarify objections and identify potential sales opportunities from them
	6.3 Deal with customer queries and objections with clear and accurate responses
	6.4 Resolve customer queries about the product and/or service
	6.5 Reassure the customer to confirm their objections have been overcome
	6.6 Develop a positive relationship with customers and identify and pursue further customer contact
7. Be able to close the sale during outbound telephone sales calls	7.1 Perform a trial close to establish whether or not further objections exist
	7.2 Gain a commitment from the customer
	7.3 Complete the formalities of the sale following organisational procedures
	7.4 Provide customer feedback and reaction to products or services to appropriate people in own organisation

Unit 13: Maintain a positive and customer-friendly attitude
Unit number: R/601/1209
Credit: 5
GLH: 33
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Show the right attitude for customer service	1.1 Speak to customers clearly and put them at their ease
	1.2 Recognise how customers are feeling and establish a rapport with them
	1.3 Show customers that you are willing and enthusiastic at all times
	1.4 Recognise that each customer is different and treat them as an individual
	1.5 Show customers respect at all times and under any circumstances
	1.6 Show customers that you can be relied on
	1.7 Show colleagues respect at all times and under any circumstances
	1.8 Show colleagues that you can be relied on
2. Show appropriate and positive behaviours to customers	2.1 Recognise and respond when a customer wants or needs attention
	2.2 Greet customers politely and positively
	2.3 Focus on customers and ignore distractions which are not important to them
	2.4 React appropriately to situations that are important enough to interrupt their work with a customer
	2.5 Thank customers for the information they have given or for doing business with your organisation
	2.6 Help colleagues to provide good customer service
3. Know how to maintain a positive and customer-friendly attitude	3.1 Identify signs that a customer gives when seeking attention
	3.2 Describe what rapport looks, sounds and

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	feels like
	3.3 Identify what unimportant distractions are
	3.4 Identify what is important enough to interrupt their work with a customer
	3.5 Identify positive and negative body language and facial expressions
	3.6 State how people are different and have different expectations for many reasons such as their age, culture and personality

Unit 14: Communicate using customer service language
Unit number: F/601/1609
Credit: 4
GLH: 30
Level: 1

Learning Outcomes	Assessment Criteria	
The learner will	*The learner can*	
1. Identify customers and their characteristics and expectations	1.1	Recognise typical customers and their expectations
	1.2	Discuss customer expectations with colleagues using recognised customer service language
	1.3	Follow procedures through which they and their colleagues deliver effective customer service
2. Identify their organisation's services and products	2.1	Outline their organisation's services and products to customers
	2.2	Greet customers politely and positively
	2.3	List the information they need to deliver effective customer service and where that information can be found
3. Know how to communicate using customer service language	3.1	Identify the differences between an internal customer and an external customer
	3.2	List their organisations services or products
	3.3	Describe the connection between customer expectations and customer satisfaction in customer service
	3.4	Describe why organisation procedures are important to good customer service
	3.5	Explain why teamwork is central to good customer service
	3.6	Identify the service offer of their organisation
	3.7	Identify the part they play in delivering customer service
	3.8	Identify who are their customers
	3.9	Describe the main characteristics of typical customers that they deal with

Learning Outcomes	Assessment Criteria
The learner will	**The learner can**
	3.10 Identify what impresses their customers and what annoys their customers
	3.11 Identify who's who and who does what to deliver customer service in their organisation
	3.12 Describe the kinds of information they need to give good customer service to customers
	3.13 Explain how to find information about their organisation's services or products.
	3.14 List typical customer service problems in their work and who should be told about them
	3.15 Explain how the way they behave affects their customer's service experience

Unit 15: Recognise and deal with customer queries, requests and problems
Unit number: M/601/1508
Credit: 5
GLH: 33
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Recognise and deal with customer queries and requests	1.1 Deal with queries and requests from customers in a positive and professional way
	1.2 Seek information or help from a colleague if they cannot answer their customer's query or request
	1.3 Obtain help from a colleague if they are not able to deal with their customer's request
	1.4 Always tell their customer what is happening
2. Recognise and deal with customer problems	2.1 Recognise when something is a problem from the customer's point of view
	2.2 Avoid saying or doing anything which may make the problem worse
	2.3 Deal with a difficult customer calmly and confidently
	2.4 Recognise when to pass a problem on to an appropriate colleague
	2.5 Pass the problem on to their colleague with the appropriate information
	2.6 Check that the customer knows what is happening
3. Know how to recognise and deal with customer queries, requests and problems	3.1 List who in the organisation is able to give help and information
	3.2 State the limits of what they are allowed to do
	3.3 Identify what professional behaviour is
	3.4 Describe how to speak to people who are dissatisfied
	3.5 Describe how to deal with difficult people
	3.6 State what customers normally expect
	3.7 Identify how to recognise a problem from

Learning Outcomes	Assessment Criteria
The learner will	**The learner can**
	what a customer says or does
	3.8 Describe what kinds of behaviours/actions would make situations worse
	3.9 List the organisational procedures they must follow when they deal with problems or complaints
	3.10 Identify the types of behaviour that may make a problem worse

Unit 16: Take details of customer service problems
Unit number: T/601/1509
Credit: 4
GLH: 27
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Respond to customers who raise a problem	1.1 Recognise when their customer is raising a problem
	1.2 Respond to their customer calmly and helpfully
	1.3 Take details that will identify their customer
2. Gather details from customers who raise a problem	2.1 Ask their customer questions to clarify what has or has not happened to cause a problem
	2.2 Check their understanding of what their customer sees as the problem
	2.3 Ask their customer questions to clarify the customer's expectations about the service or product that is now causing a problem
	2.4 Note the details of what their customer tells them about the problem
	2.5 Confirm with their customer details of what the customer has told them about the problem
3. Pass details of problems raised by customers to the colleague who can deal with them	3.1 Collect details of any reference codes or identifiers which their organisation uses to identify the customer transaction that is now causing a problem
	3.2 Gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications
	3.3 Tell their customer what they will do with the details of the problem so that action is taken
	3.4 Tell their customer what to expect without making customer service promises that may not be met
	3.5 Pass the detail to a colleague who is able to deal with the problem

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
4. Know how to take details of customer service problems	4.1 Identify customer expectations of the organisation's services or products that may cause problems if they are not met
	4.2 Describe how to respond to customers who raise problems in a way that the customers will find calm and helpful
	4.3 Name reference codes or identifiers their organisation uses to identify customers
	4.4 Identify questions that can be used to gather information that will be most helpful in resolving a problem
	4.5 State details their organisation needs to resolve a problem
	4.6 Describe details their organisation uses to identify specific customer transactions
	4.7 Name the appropriate colleagues to whom details of problems should be passed
	4.8 Identify their organisation's preferences for the way in which details of problems should be passed on

Unit 17: Develop your own customer service skills through self-study

Unit number: R/601/1548
Credit: 6
GLH: 40
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Find ways to learn more about customer service and their job	1.1 Identify different sources of information and support that will help them to develop their customer service knowledge and skills
	1.2 Agree with their line manager, their mentor or others doing a similar job the best sources to use for self development of their customer service knowledge and skills
	1.3 Take action to remind themself to check on sources of information and support
	1.4 Search for additional sources of information to support their customer service learning
	1.5 Store materials that support self-study for future use
	1.6 Plan time to study the self-study materials they have collected
2. Use sources of self-development to extend their customer service skills and knowledge	2.1 Access organisational update information to extend their knowledge of products and services
	2.2 Access organisational information to learn more about the way their role contributes to customer service
	2.3 Monitor publications to identify ideas and new developments in customer service which they could apply in their work
	2.4 Study collected information to develop their own customer service knowledge and skills
	2.5 Take action resulting from their learning to change the way they deal with customers
	2.6 Share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	further options
	2.7 Record actions they take to learn more about customer service and identify those which have the most positive effects
3. Know how to develop their own customer service skills through self-study	3.1 Describe ways to locate information updating them on services and products in their information
	3.2 Identify sources of information about customer service knowledge and skills that will help them to develop
	3.3 List ways to store information that they use to develop their customer service skills
	3.4 Describe the importance of focus when self-studying to improve their customer service knowledge and skills
	3.5 Identify ways to convert information or ideas they have found through self-study into practical customer service actions
	3.6 Identify the value of discussing their learning with their line manager, their mentor or others doing a similar job
	3.7 Evaluate methods of recording actions to improve their customer service skills which have had positive effects

Unit 18: IT Communication Fundamentals

Unit number: Y/502/4291
Credit: 2
GLH: 15
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Use a variety of sources of information to meet needs	1.1 Use appropriate sources of IT-based and other forms of information to meet needs 1.2 Identify different features of information 1.3 Recognise copyright constraints on the use of information
2. Access, search for, select and use Internet-based information and assess its fitness for purpose	2.1 Access, navigate and search Internet sources of information purposefully and effectively 2.2 Use appropriate search techniques to locate and select relevant information 2.3 Outline how the information meets requirements and is fit for purpose
3. Select and use IT to communicate and exchange information	3.1 Create, access, read and respond appropriately to email and other IT-based communication 3.2 Use IT tools to maintain an address book and schedule activities

Unit 19: Using the Internet
Unit number: T/502/4296
Credit: 3
GLH: 20
Level: 1

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
1. Connect to the internet	1.1 Identify different types of connection methods that can be used to access the Internet 1.2 Access the Internet or intranet
2. Use browser software to navigate web pages	2.1 Use browser tools to navigate webpages 2.2 Identify when to change browser settings to aid navigation 2.3 Adjust browser settings to meet needs 2.4 Use browser help facilities
3. Use browser tools to search for information from the internet	3.1 Select and use appropriate search techniques to locate information 3.2 Outline how information meets requirements 3.3 Use references to make it easier to find information another time 3.4 Download and save different types of information from the Internet
4. Use browser software to communicate information online	4.1 Select and use tools and techniques to communicate information online 4.2 Use browser tools to share information sources with others 4.3 Submit information online using forms or interactive sites 4.4 Identify opportunities to post or publish material to websites
5. Follow and understand the need for safety and security practices when working online	5.1 Identify the threats to user safety when working online 5.2 Outline how to minimise internet security risks

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	5.3 Work responsibly and take appropriate safety and security precautions when working online 5.4 Keep personal information secure 5.5 Follow relevant laws, guidelines and procedures for the use of the internet

Appendix 3: Sample assessment material

Highfield provide an assessment pack which is available to download from the members area of the Highfield website.

The following is an example of an evidence tracking sheet (found within the assessment pack) used to record completed learner's progress in meeting all the critiera.