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## Qualification Specification

# Highfield Level 2 NVQ Certificate in Customer Service (RQF)

Qualification Number: 600/5469/4

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## Highfield Level 2 NVQ Certificate in Customer Service (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

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### Qualification regulation and support

The Highfield Level 2 NVQ Certificate in Customer Service (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. The qualification is also regulated by Qualifications Wales.

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### Key facts

<b>Qualification number:</b>	600/5469/4
<b>Learning aim reference:</b>	60054694
<b>Credit value:</b>	28
<b>Assessment method:</b>	Portfolio of evidence
<b>Guided learning hours (GLH):</b>	192
<b>Total qualification time (TQT):</b>	280

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### Qualification overview and objective

The objective of this qualification is to prepare learners for employment and support learners who deal, or intend to deal, with customers on a daily basis as part of their job role. It is applicable to a variety of work environments and covers topics such as communicating effectively with customers, making customer service personal and deal with customers face to face

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### Entry requirements

To register for this qualification, learners are required to be aged 16 years or above.

Highfield recommend 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 learning and experience, where appropriate. It is advised that learners have Level 1 English before enrolling onto this course.

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### Geographical coverage

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

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### Guidance on delivery

The total qualification time for this qualification is 280 and of this 192 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

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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.

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### **Guidance on assessment**

This qualification is assessed by Portfolio of evidence. Suggested paperwork is available to download from the members area of the Highfield website. If a Centre would like to use alternative paperwork, this must be sent to the quality support team for approval before commencement of the course.

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.

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### **Guidance on quality assurance**

Highfield requires centres to have in place a robust mechanism for internal quality assurance of training delivery and internal assessment processes. 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 will support centres by conducting ongoing engagements to ensure and verify the effective and efficient delivery of the qualification.

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### **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.

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### **Assessor requirements**

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

- have experience in industry or hold a relevant subject area qualification which could include any of the following:
  - Highfield Level 2 Diploma in Customer Service
  - Highfield Level 2 NVQ Certificate in Customer Service
  - Highfield Level 3 Diploma in Customer Service
  - Highfield Level 3 Certificate in Customer Service
- hold or be working towards a recognised assessing qualification which could include any of the following:
  - A1
  - D32/D33
  - Highfield Level 3 Award in Assessing Vocationally Related Achievement
- maintain appropriate continued professional development for the subject area



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## Internal quality assurance (IQA) requirements

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

- have experience in industry or hold a relevant subject area qualification which could include any of the following:
  - Highfield Level 2 Diploma in Customer Service
  - Highfield Level 2 NVQ Certificate in Customer service
  - Highfield Level 3 Diploma in Customer Service
  - Highfield Level 3 Certificate in Customer Service
- hold or be working towards a recognised internal quality assurance qualification, which could include any of the following:
  - D34
  - V1
  - Highfield Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice or above
- maintain appropriate continued professional development for the subject area

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## Countersigning strategy

While it is a minimum requirement for centres to have the appropriately qualified workforce in place, it is understood that centres may have new personnel that are working towards those requirements. During this period, centres are required to have a robust countersigning strategy in place that supports and validates unqualified assessment/quality assurance decisions, until the point where they meet the requirements as detailed above.

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## 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.

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## 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.**

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### **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 Diploma in Customer Service
- Highfield Level 2 Diploma for Customer Service Practitioners
- Highfield Level 3 Diploma in Customer Service
- Customer Service Practitioner Apprenticeship

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### **Useful websites**

[www.skillsca.org](http://www.skillsca.org)

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## Appendix 1: Qualification structure

To complete the Highfield Level 2 NVQ Certificate in Customer Service (RQF), learners must complete learners must complete the following

- **all units** contained within the **mandatory group**
- **a minimum of 20 credits** from the optional units in **groups A-D**

**At least one unit must be chosen from each of the optional groups**

### Mandatory Units

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

Unit reference	Unit title	Level	GLH	Credit
F/601/1609	Communicate using customer service language	1	30	4
L/601/1614	Follow the rules to deliver customer service	2	30	4

### Optional Unit Group A

Learners must achieve **a minimum of 1 unit** from this group

Unit reference	Unit title	Level	GLH	Credit
R/601/1209	Maintain a positive and customer-friendly attitude	1	33	5
L/601/1211	Adapt your behaviour to give a good customer service impression	1	33	5
R/601/1212	Communicate effectively with customers	2	33	5
L/601/0933	Give customers a positive impression of yourself and your organisation	2	33	5
D/601/0936	Promote additional services or products to customers	2	40	6
H/601/1215	Process information about customers	2	33	5
M/601/1217	Live up to the customer service promise	2	40	6
T/601/1218	Make customer service personal	2	40	6
M/601/1220	Go the extra mile in customer service	2	40	6
T/601/1221	Deal with customers face to face	2	33	5
F/601/1223	Deal with incoming telephone calls from customers	2	33	5
J/601/1224	Make telephone calls to customers	2	40	6
R/601/1226	Deal with customers in writing or electronically	3	40	6
D/601/1228	Use customer service as a competitive tool	3	53	8
D/601/1231	Organise the promotion of additional services or products to customers	3	47	7
K/601/1233	Build a customer service knowledge set	3	47	7



**Optional Unit Group B**Learners must achieve a **minimum of 1 unit** from this group

Unit reference	Unit title	Level	GLH	Credit
A/601/1205	Do your job in a customer friendly way	1	33	5
J/601/1210	Deliver reliable customer service	2	33	5
Y/601/1213	Deliver customer service on your customer's premises	2	33	5
K/601/1216	Recognise diversity when delivering customer service	2	33	5
A/601/1219	Deal with customers across a language divide	2	53	8
A/601/1222	Use questioning techniques when delivering customer service	2	27	4
L/601/1225	Deal with customers using bespoke software	2	33	5
Y/601/1227	Maintain customer service through effective handover	2	27	4
H/601/1229	Deliver customer service using service partnerships	3	40	6
Y/601/1230	Organise the delivery of reliable customer service	3	40	6
H/601/1232	Improve the customer relationship	3	47	7

**Optional Unit Group C**Learners must achieve a **minimum of 1 unit** from this group

Unit reference	Unit title	Level	GLH	Credit
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
M/601/1511	Resolve customer service problems	2	40	6
T/601/1512	Deliver customer service to difficult customers	2	40	6
J/601/1515	Monitor and solve customer service problems	3	40	6
D/601/1519	Apply risk assessment to customer service	3	67	10
D/601/1522	Process customer service complaints	3	40	6

**Optional Unit Group D**Learners must achieve a **minimum of 1 unit** from this group

Unit reference	Unit title	Level	GLH	Credit
T/601/1526	Develop customer relationships	2	40	6
A/601/1530	Support customer service improvements	2	33	5
R/601/1534	Develop personal performance through delivering customer service	2	40	6
H/601/1540	Support customers using on-line customer services	2	33	5

M/601/1542	Buddy a colleague to develop their customer service skills	2	33	5
R/601/1548	Develop your own customer service skills through self-study	2	40	6
Y/601/1549	Support customers using self-service technology	2	33	5
D/601/1553	Work with others to improve customer service	3	53	8
H/601/1554	Promote continuous improvement	3	47	7
K/601/1555	Develop your own and others' customer service skills	3	53	8
H/601/1568	Lead a team to improve customer service	3	47	7
H/601/1571	Gather, analyse and interpret customer feedback	3	67	10
T/601/1574	Monitor the quality of customer service transactions	3	47	7

## Appendix 2: Qualification content

### Unit 1: Communicate using customer service language

Unit number: F/601/1609

Credit: 4

GLH: 30

Level: 1

#### Unit Introduction

This unit is about the language and basic principles that are the heart of customer service and the skills needed to communicate effectively with customers and colleagues. It also covers how the learner fits into the customer service picture in their organisation and the contribution of their job to good customer service. The individual needs to be able to describe and explain the services or products that their organisation offers and how it delivers customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Know how to communicate using customer service language</p>	<p>3.1 identify the differences between an internal customer and an external customer</p> <p>3.2 list their organisation’s services or products</p> <p>3.3 describe the connection between customer expectations and customer satisfaction in customer service</p> <p>3.4 describe why organisation procedures are important to good customer service</p> <p>3.5 explain why teamwork is central to good customer service</p> <p>3.6 identify the service offer of their organisation</p> <p>3.7 identify the part they play in delivering customer service</p> <p>3.8 identify who are their customers</p> <p>3.9 describe the main characteristics of typical customers that they deal with</p> <p>3.10 identify what impresses their customers and what annoys their customers</p> <p>3.11 identify who’s who and who does what to deliver customer service in their organisation</p> <p>3.12 describe the kinds of information they need to give good customer service to customers</p> <p>3.13 explain how to find information about their organisation’s services or products</p> <p>3.14 list typical customer service problems in their work and who should be told about them</p> <p>3.15 explain how the way they behave affects their customer’s service experience</p>

**Unit 2: Follow the rules to deliver customer service**

Unit number: L/601/1614

Credit: 4

GLH: 30

Level: 2

**Unit Introduction**

This unit requires the learner to understand all the rules that apply to customer service delivered by their organisation and how they apply to the learner and their job.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Follow their organisation’s customer service practices and procedures</p>	<p>1.1 follow organisational practices and procedures that relate to their customer service work</p> <p>1.2 recognise the limits of what they are allowed to do when delivering customer service</p> <p>1.3 refer to somebody in authority when they need to</p> <p>1.4 work in a way that protects the security of customers and their property</p> <p>1.5 work in a way that protects the security of information about customers</p>
<p>2. know how to follow the rules to deliver customer service</p>	<p>2.1 describe organisational practices and procedures that relate to their customer service work</p> <p>2.2 identify the limits of what they are allowed to do when delivering customer service</p> <p>2.3 explain when and how they should refer to somebody in authority about the rules for delivering customer service</p> <p>2.4 explain how they protect the security of customers and their property</p> <p>2.5 explain how they protect the security of information about customers</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.6 describe their health and safety responsibilities as they relate to their customer service work</p> <p>2.7 explain their responsibilities to deliver customer service treating customers equally</p> <p>2.8 explain why it is important to respect customer and organisation confidentiality</p> <p>2.9 list the main things they must do and not do in their job under legislation that affects their customer service work</p> <p>2.10 list the main things that they must do and not do in their job under external regulations that affect their customer service work</p>

**Unit 3: Maintain a positive and customer-friendly attitude**

Unit number: R/601/1209

Credit: 5

GLH: 33

Level: 1

**Unit Introduction**

This unit is about the learner’s attitude and how the learner behaves towards customers affects customer satisfaction. Simply following procedures may not be enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. Customers like to think that staff want to help and they can show this by being friendly and positive and giving customers complete personal attention.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Show the right attitude for customer service</p>	<p>1.1 speak to customers clearly and put them at their ease</p> <p>1.2 recognise how customers are feeling and establish a rapport with them</p> <p>1.3 show customers that you are willing and enthusiastic at all times</p> <p>1.4 recognise that each customer is different and treat them as an individual</p> <p>1.5 show customers respect at all times and under any circumstances</p> <p>1.6 show customers that you can be relied on</p> <p>1.7 show colleagues respect at all times and under any circumstances</p> <p>1.8 show colleagues that you can be relied on</p>
<p>2. Show appropriate and positive behaviours to customers</p>	<p>2.1 recognise and respond when a customer wants or needs attention</p> <p>2.2 greet customers politely and positively</p> <p>2.3 focus on customers and ignore distractions which are not important to them</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.4 react appropriately to situations that are important enough to interrupt their work with a customer</p> <p>2.5 thank customers for the information they have given or for doing business with your organisation</p> <p>2.6 help colleagues to provide good customer service</p>
<p>3. Know how to maintain a positive and customer-friendly attitude</p>	<p>3.1 identify signs that a customer gives when seeking attention</p> <p>3.2 describe what rapport looks, sounds and feels like</p> <p>3.3 identify what unimportant distractions are</p> <p>3.4 identify what is important enough to interrupt their work with a customer</p> <p>3.5 identify positive and negative body language and facial expressions</p> <p>3.6 state how people are different and have different expectations for many reasons such as their age, culture and personality</p>



**Unit 4: Adapt your behaviour to give a good customer service impression**

Unit number: L/601/1211  
 Credit: 5  
 GLH: 33  
 Level: 1

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Look and act the part in order to provide a good customer service impression	1.1 dress for customer service work in the way their organisation expects 1.2 show they are working hard and making efforts to impress customers 1.3 be in the right place at the right time to give a good impression and deliver good customer service 1.4 show good manners when dealing with customers
2. Relate to their customers and to colleagues effectively	2.1 explain the benefits of dealing with customers face to face or by telephone rather than using text, e-mail or writing 2.2 talk clearly to customers using words that they can understand 2.3 talk to customers without using language that they would consider to be bad 2.4 show a willing and friendly attitude when dealing with customers without being over-familiar 2.5 help and cooperate with colleagues to give good service to customers

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Know how to adapt their behaviour to give a good customer service impression</p>	<p>3.1 identify how the way they dress affects the way that customers react to the service they provide</p> <p>3.2 describe why customers may see particular types of dress as inappropriate and how their organisation expects them to dress</p> <p>3.3 state why it is important for customers to feel that they are working hard to give them an excellent service</p> <p>3.4 state why good timekeeping and making sure they are where they are expected to be is important to giving excellent customer service</p> <p>3.5 describe what behaviour is considered by most customers to be “good manners” and what is considered to be “bad manners” or rudeness</p> <p>3.6 identify what customers and colleagues might consider to be bad language and why it may offend people</p> <p>3.7 identify why customers feel better about the service they receive if they have a willing and friendly attitude</p> <p>3.8 describe how to behave so that they appear to be willing and friendly with customers without being over-familiar</p> <p>3.9 Identify what they can do to cooperate with colleagues in giving customer service and why that might be helpful</p>

**Unit 5: Communicate effectively with customers**

Unit number: R/601/1212  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

To provide good customer service the learner needs to understand what customers want and how they feel. This means that they need to share information with them and listen carefully to them. Customers need to understand what the learner is telling them and what they are able to do for them. Communication is an essential skill for delivering good customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Communicate effectively with customers	1.1 listen actively to what customers are saying 1.2 identify the most important things that customers are telling them 1.3 respond appropriately to what customers are telling them 1.4 check that they understand what customers are telling them and make sure it is really what they mean 1.5 summarise information for customers 1.6 explain in a way that is clear and does not cause offence when they cannot help a customer 1.7 use appropriate body language when communicating with customers 1.8 read customers’ body language to help them understand their feelings and wishes 1.9 deal with customers in a respectful, helpful and professional way at all times 1.10 help to give good customer service by passing messages to colleagues

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Understand how to communicate effectively with customers</p>	<p>2.1 identify the difference between hearing and listening</p> <p>2.2 explain how to listen actively</p> <p>2.3 describe how to read both positive and negative body language</p> <p>2.4 explain how to use body language effectively</p> <p>2.5 state how to use questions to check that they understand what customers are telling them</p> <p>2.6 identify the difference between negative and positive language</p> <p>2.7 explain how to summarise</p> <p>2.8 explain why it is important to speak clearly</p> <p>2.9 explain why it is important to use words that the customer will understand</p> <p>2.10 describe how to communicate with customers who have language, dialect or accents that are different from theirs</p> <p>2.11 explain why the way things are said, and the tone of voice, affects the way a customer experiences customer service</p> <p>2.12 identify what information is helpful to pass on in messages to colleagues so that customers receive good service</p>

**Unit 6: Give customers a positive impression of yourself and your organisation**

Unit number: L/601/0933

Credit: 5

GLH: 33

Level: 5

**Unit Introduction**

Excellent customer service is provided by people who are good with people. The learner’s behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learner’s behaviour counts when dealing with a customer.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Establish rapport with customers</p>	<p>1.1 meet their organisation’s standards of appearance and behaviour</p> <p>1.2 greet their customer respectfully and in a friendly manner</p> <p>1.3 communicate with their customer in a way that makes them feel valued and respected</p> <p>1.4 identify and confirm their customer’s expectations</p> <p>1.5 treat their customer courteously and helpfully at all times</p> <p>1.6 keep their customer informed and reassured</p> <p>1.7 adapt their behaviour to respond to different customer behaviour</p>
<p>2. Respond appropriately to customers</p>	<p>2.1 respond promptly to a customer seeking help</p> <p>2.2 choose the most appropriate way to communicate with their customer</p> <p>2.3 check with their customer that they have fully understood their expectations</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.4 respond promptly and positively to their customer’s questions and comments</p> <p>2.5 allow their customer time to consider their response and give further explanation when appropriate</p>
<p>3. Communicate information to customers</p>	<p>3.1 quickly find information that will help their customer</p> <p>3.2 give their customer information they need about the services or products offered by their organisation</p> <p>3.3 recognise information that their customer might find complicated and check whether they fully understand</p> <p>3.4 explain clearly to their customers any reasons why their expectations cannot be met</p>
<p>4. Understand how to give customers a positive impression of themselves and the organisation</p>	<p>4.1 describe their organisation’s standards for appearance and behaviour</p> <p>4.2 explain their organisation’s guidelines for how to recognise what their customer wants and respond appropriately</p> <p>4.3 identify their organisation’s rules and procedures regarding the methods of communication they use</p> <p>4.4 explain how to recognise when a customer is angry or confused</p> <p>4.5 identify their organisation’s standards for timeliness in responding to customer questions and requests for information</p>

**Unit 7: Promote additional services or products to customers**

Unit number: D/601/0936  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products the organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products. This unit is about the learner's need to keep pace with new developments and to encourage customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from the organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available.

Learners should not choose this unit if their organisation does not want them to suggest additional services or products to customers.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Identify additional services or products that are available	1.1 update and develop their knowledge of their organisation's services or products  1.2 check with others when they are unsure about new service or product details  1.3 identify appropriate services or products that may interest their customer  1.4 spot opportunities for offering their customer additional services or products that will improve the customer experience
2. Inform customers about additional services or products	2.1 choose the best time to inform their customer about additional services or products  2.2 choose the best method of communication to introduce their customer to additional services or products

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 give their customer accurate and sufficient information to enable them to make a decision about the additional services or products</p> <p>2.4 give their customer time to ask questions about the additional services or products</p>
<p>3. Gain customer commitment to using additional services or products</p>	<p>3.1 close the conversation if the customer shows no interest</p> <p>3.2 give information to move the situation forward when their customer shows interest</p> <p>3.3 secure customer agreement and check customer understanding of the delivery of the service or product</p> <p>3.4 take action to ensure prompt delivery of the additional services or products to their customer</p> <p>3.5 refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility</p>
<p>4. Understand how to promote additional services or products to customers</p>	<p>4.1 describe the organisation’s procedures and systems for encouraging the use of additional services or products</p> <p>4.2 explain how additional services or products will benefit their customers</p> <p>4.3 explain how their customer’s use of additional services or products will benefit their organisation</p> <p>4.4 identify the main factors that influence customers to use their services or products</p>



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>4.5 explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p> <p>4.6 state how to give appropriate, balanced information to customers about services or products</p>

**Unit 8: Process information about customers**

Unit number: H/601/1215  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

The learner and their organisation need information about their customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by the organisation to develop its customer service. Some customer information is collected from customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case the learner must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Collect information about customers	1.1 collect and record new information about customers following the organisation’s guidelines  1.2 update existing information about customers  1.3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines
2. Select and retrieve information about customers	2.1 respond promptly to authorised requests for information about customers  2.2 select and retrieve relevant information for customers or colleagues following the organisation’s guidelines
3. Supply information about customers	3.1 supply accurate and sufficient information about customers to meet their customers’ or colleagues’ expectations  3.2 choose the most appropriate way to supply information to their customers or colleagues  3.3 confirm that their customers or colleagues have received and understood the customer information

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>4. Understand how to process customer service information</p>	<p>4.1 describe their organisation’s procedures and guidelines for collecting, retrieving and supplying information about customers</p> <p>4.2 identify types of personal information about customers that should and should not be kept on record</p> <p>4.3 explain how to collect information about customers efficiently and effectively</p> <p>4.4 explain how to operate the customer information storage system</p> <p>4.5 explain why processing information about customers correctly makes an important contribution to effective customer service</p> <p>4.6 explain the importance of attention to detail when processing information about customers</p> <p>4.7 describe legal and regulatory restrictions on the storage and use of customer data</p>

**Unit 9: Live up to the customer service promise**

Unit number: M/601/1217  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

The learner may work in an organisation that has a carefully defined brand and vision that includes a specific service offer and promise to their customers. Often, much work has taken place to develop these and they influence what the customer expects. By promoting the brand, the organisation is making a promise to their customers about what they can expect. Customer satisfaction is unlikely to be achieved if their experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have firm expectations. This unit is about the way the learner’s work supports the branding of their services or products. It covers what they must do to make sure that they deliver the promise that the customer has come to expect. It also covers how the learner can avoid giving their customer an experience that is significantly different from the one offered in the promise.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Understand and explain the customer service promise</p>	<p>1.1 explain the key features of the service offer, vision and promise their organisation has made</p> <p>1.2 identify the role they can play to ensure that their customer believes that the service offer, vision and promise is being delivered</p> <p>1.3 explain the procedures and regulations their organisation follows to support the service offer, vision and promise</p> <p>1.4 devise and use phrases that reinforce the service offer, vision and promise</p> <p>1.5 identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise</p> <p>1.6 identify moments and actions within the delivery of customer service that are particularly relevant to their customer’s experience of the promise being delivered</p> <p>1.7 share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Produce customer satisfaction by delivering the customer service promise</p>	<p>2.1 ensure that their appearance and behaviour supports the organisation’s service offer, vision and promise</p> <p>2.2 observe or listen to the customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise</p> <p>2.3 take actions to deliver customer service in a way that meets their customer’s expectations and understanding of the service offer, vision and promise</p> <p>2.4 ensure that what they decide to do is realistic and in line with the service offer and promise</p> <p>2.5 be positive about and supportive of the service offer and promise</p>
<p>3. Know how to live up to the customer service promise</p>	<p>3.1 identify the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation’s service offer, vision and promise</p> <p>3.2 identify ways in which staff can contribute to communicating the service vision or promise to customers</p> <p>3.3 explain sales, marketing and/or public relations reasons for defining a service offer, vision and promise</p> <p>3.4 describe how words can be used and adapted to reflect a defined service offer, vision and promise</p> <p>3.5 describe how actions can be used and adapted to reflect a defined service offer, vision and promise</p>

**Unit 10: Make customer service personal**

Unit number: T/601/1218  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

Research has shown that customer satisfaction increases if customers feel they have been treated in a way that recognises their own personal needs. When they are delivering customer service, learners often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything the learner can do to make each customer feel that they have had their complete attention and have been dealt with personally increases their sense of satisfaction. This unit is about how the learner can help their customers feel that they have experienced service that focuses on them as an individual. When the learner works with a customer, they need to give the impression that it is on a ‘one to one’ basis, that they care what happens to their customer and that they respect their customer as an individual.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Identify opportunities for making customer service personal</p>	<p>1.1 identify which of their organisation’s systems or procedures allows them to add a personal touch to the service</p> <p>1.2 observe and listen to their customer carefully for signs that will guide how they personalise the service</p> <p>1.3 let the customer know that they understand and that they are there to help</p> <p>1.4 identify opportunities to help or direct their customer outside of normal routines and procedures</p> <p>1.5 identify customers with particular needs who would especially appreciate personal service</p> <p>1.6 balance the time they take when giving individual attention to one customer with the needs and expectations of other customers</p> <p>1.7 make extra efforts to show how willing and able they are to give a more personal service</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Treat their customer as an individual</p>	<p>2.1 greet and deal with their customer in a way that respects them as an individual</p> <p>2.2 focus their attention on the customer they re dealing with</p> <p>2.3 always communicate with their customer in a friendly and open way</p> <p>2.4 use their customer’s name when it is known and appropriate</p> <p>2.5 follow their organisation’s guidelines about giving their customer their own name and contact details</p> <p>2.6 concentrate on building a ‘one to one’ relationship with their customer by making them feel valued and respected</p>
<p>3. Know and understand how to make customer service personal</p>	<p>3.1 explain how the use of the customer’s name makes service more personal</p> <p>3.2 describe personality types and their receptiveness to personalised services</p> <p>3.3 identify types of personal information about customers that should and should not be kept on record</p> <p>3.4 identify features of personal service that are most appreciated by customers with individual needs</p> <p>3.5 describe body language and approaches that promote open communication</p> <p>3.6 describe the organisation’s guidelines on actions that are permissible outside of the normal routines and procedures</p> <p>3.7 explain their own preferences and comfort levels relating to how they are willing and able to personalise service</p>

**Unit 11: Go the extra mile in customer service**

Unit number: M/601/1220  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

When the customer feels that the learner has taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to the customer’s experience depend on the learner spotting what the customer will particularly appreciate. Often they can offer this little extra when sorting out a difficulty or problem. Whatever special service the learner gives when they “go the extra mile” must be within their own authority or with the authority of an appropriate colleague. It must also take account of the organisation’s service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has “gone the extra mile” to deliver special customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Distinguish between routine service standards and going the extra mile	1.1 explain the service offer clearly and concisely  1.2 identify their customer’s expectations and needs  1.3 match the service offer with their customer’s expectations and needs and identify the key differences  1.4 identify options for other actions that will give added value to customer service and might impress their customer  1.5 choose actions that are most appropriate to impress their customer
2. Check that your extra mile ideas are feasible	2.1 match their ideas for added value customer service against their authority to see them through  2.2 check that their ideas for added value customer service are possible within their organisation’s guidelines



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 check that their ideas for added value customer service are possible within regulatory boundaries</p> <p>2.4 check that their ideas for added value customer service will not unreasonably affect the service to their other customers</p> <p>2.5 explain their ideas for added value service to a senior colleague or other appropriate authority</p>
<p>3. Go the extra mile</p>	<p>3.1 take action to go the extra mile in customer service</p> <p>3.2 ensure that their customer is aware of the added value of their actions</p> <p>3.3 monitor the effects of their added value actions to ensure that the service given to their other customers is not affected unreasonably</p> <p>3.4 note and pass on positive feedback from their customer about their actions</p> <p>3.5 suggest that an extra mile action becomes routine if they have seen it work several times and it could be accommodated within the service offer</p>
<p>4. Know how to go the extra mile in customer service</p>	<p>4.1 describe their organisation’s service offer</p> <p>4.2 explain how customers form expectations of the service they will receive</p> <p>4.3 identify what types of service action most customers will see as adding value to the customer service they have already had</p> <p>4.4 outline their organisation’s rules and procedures that determine their authority to go the extra mile</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>4.5 identify relevant legislation and regulation that impact on their freedom to go the extra mile</p> <p>4.6 describe how their organisation receives customer service feedback on the types of customer experience that has impressed them</p> <p>4.7 describe their organisation’s procedures for making changes in its service offer</p>

**Unit 12: Deal with customers face to face**

Unit number: T/601/1221  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

This unit is about the skills the learner needs to deal with their customer in person and face to face. Good feelings about the way the learner looks and behaves can improve how their customer feels about the transaction and give them greater satisfaction. Whilst verbal communication is important, the learner focusses on their customer and the relationship that is formed also depends on the nonverbal communication that takes place between them. The learner will have many opportunities to impress their customer, and their behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Communicate effectively with their customer</p>	<p>1.1 plan a conversation with their customer that has structure and clear direction</p> <p>1.2 hold a conversation with their customer that establishes rapport</p> <p>1.3 focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation</p> <p>1.4 explain their services or products and their organisation’s service offer to their customer clearly and concisely</p> <p>1.5 adapt their communication to meet the individual needs of their customer</p> <p>1.6 anticipate their customer’s requests and needs for information</p> <p>1.7 balance conflicting demands for their attention whilst maintaining rapport with their current customer</p> <p>1.8 calm down situations when one customer is adversely affecting the customer service enjoyed by other customers</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Improve the rapport with their customer through body language</p>	<p>2.1 present a professional and respectful image when dealing with their customer</p> <p>2.2 show an awareness of their customer’s needs for personal space</p> <p>2.3 focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation</p> <p>2.4 ensure that their customer focus is not disrupted by colleagues</p> <p>2.5 observe all customers and the total customer service situation whilst maintaining rapport with their current customer</p> <p>2.6 observe their customer to read non-verbal clues about the customer’s wishes and expectations</p>
<p>3. Understand how to deal with customers face to face</p>	<p>3.1 explain the importance of speaking clearly and slowly when dealing with a customer face to face</p> <p>3.2 state the importance of taking the time to listen carefully to what the customer is saying</p> <p>3.3 identify the organisation’s procedures that impact on the way they are able to deal with their customers face to face</p> <p>3.4 describe the features and benefits of the organisation’s services or products</p> <p>3.5 explain the organisation’s service offer and how it affects the way they deal with customers face to face</p> <p>3.6 explain the principles of body language that enables them to interpret customer feelings without verbal communication</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.7 explain the difference between behaving assertively, aggressively and passively</p> <p>3.8 explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction</p> <p>3.9 describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them</p>

**Unit 13: Deal with incoming telephone calls from customers**

Unit number: F/601/1223  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because they see making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Use communication systems effectively	1.1 operate telecommunication equipment efficiently and effectively  1.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer  1.3 listen carefully when collecting information from their customer  1.4 select the information they need to record and store following their organisation’s guidelines  1.5 update their customer records during or after the call to reflect the key points of the conversation
2. Establish rapport with customers who are calling	2.1 greet their customer following their organisation’s guidelines  2.2 listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call  2.3 confirm the identity of their customer following organisational guidelines  2.4 use effective and assertive questions to clarify their customer’s requests

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Deal effectively with customer questions and requests</p>	<p>3.1 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each</p> <p>3.2 choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.3 give clear and concise information to customers in response to questions or requests</p> <p>3.4 use questions and answers to control the length of the conversation</p> <p>3.5 keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time</p> <p>3.6 put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague</p> <p>3.7 summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.8 check before the call is finished that their customer is content that all their questions or requests have been dealt with</p> <p>3.9 complete any follow up actions agreed during the call</p> <p>3.10 take a clear message for a colleague if they are unable to deal with some aspect of their customer’s questions or requests</p> <p>3.11 ensure that promises to call back are kept</p>
<p>4. Know how to deal with incoming telephone calls from customers</p>	<p>4.1 describe their organisation’s guidelines and procedures for the use of telecommunication equipment</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>4.2 explain how to operate the organisation’s telecommunication equipment</p> <p>4.3 explain the importance of speaking clearly and slowly when dealing with customers by telephone</p> <p>4.4 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone</p> <p>4.5 explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand</p> <p>4.6 identify what information is important to note during or after telephone conversations with customers</p> <p>4.7 describe their organisation’s guidelines and procedures for what should be said during telephone conversations with customers</p> <p>4.8 explain the importance of keeping their customer informed if they are on hold during a call</p> <p>4.9 explain the importance of not talking across an open line</p> <p>4.10 list details that should be included if taking a message for a colleague</p> <p>4.11 describe their organisation’s guidelines and procedures for taking action to follow up calls made to customers</p> <p>4.12 describe their organisation’s guidelines for handling abusive calls</p>



**Unit 14: Make telephone calls to customers**

Unit number: J/601/1224  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation’s customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Plan their calls effectively	1.1 use all appropriate customer information to plan their call  1.2 anticipate their customer’s expectations and assemble all the information they might need before their conversation with the customer  1.3 identify the objective of their call and the way in which they expect the call to end  1.4 plan the opening part of their conversation with their customer and anticipate possible responses
2. Use communication systems effectively	2.1 operate telecommunication equipment efficiently and effectively  2.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer  2.3 listen carefully when collecting information from their customer  2.4 select the information they need to record and store following their organisation’s guidelines

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	2.5 update their customer records during or after the call to reflect the key points of the conversation
3. Make focussed calls to their customer	3.1 open the conversation positively and establish a rapport with their customer 3.2 confirm the identity of their customer following organisational guidelines 3.3 ensure that their customer is aware of the purpose of their call as early as possible 3.4 respond positively to queries and objections from their customer 3.5 summarise the outcome of the call and any actions that they or their customer will take as a result 3.6 complete any follow up actions agreed during the call
4. Know how to make telephone calls to customers	4.1 describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls 4.2 describe their organisation's guidelines and procedures for the use of telecommunication technology 4.3 explain how to operate their organisation's telecommunication technology 4.4 explain the importance of speaking clearly and slowly when dealing with customers by telephone 4.5 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone 4.6 explain the importance of adapting their speech to meet the needs of customers who

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>may find their language or accent difficult to understand</p> <p>4.7 identify what information it is important to note during or after telephone conversations with customers</p> <p>4.8 describe their organisation’s guidelines and procedures for what should be said during telephone conversations with customers</p> <p>4.9 describe their organisation’s guidelines and procedures for taking action to follow up calls made to customers</p>

**Unit 15: Deal with customers in writing or electronically**

Unit number: R/601/1226  
 Credit: 6  
 GLH: 40  
 Level: 3

**Unit Introduction**

Some customer service delivery involves communicating with a customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with a customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Use written or electronic communication effectively</b></p>	<p>1.1 operate equipment used to communicate in writing or electronically efficiently and effectively</p> <p>1.2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service</p> <p>1.3 use language that is clear and concise</p> <p>1.4 adapt their use of language to meet the individual needs of their customer</p> <p>1.5 ensure that the style and tone of their written or electronic communication follows their organisation’s guidelines and matches the service offer</p>
<p><b>2. Plan and send an effective written or electronic communication</b></p>	<p>2.1 anticipate their customer’s expectations taking account of any previous exchanges they may have had</p> <p>2.2 assemble all the information they need to construct the communication</p> <p>2.3 plan the objective of their communication</p> <p>2.4 format their communication following their organisation’s guidelines</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 open the communication positively to establish a rapport with their customer</p> <p>2.6 ensure that their customer is aware of the purpose of the communication as early as possible</p> <p>2.7 summarise the key point of the communication and any actions that they or their customer will take as a result</p>
<p><b>3. Handle incoming written or electronic communications effectively</b></p>	<p>3.1 read their customer’s communication carefully to identify their precise reason for contacting you</p> <p>3.2 identify what they are seeking as the outcome of the contact</p> <p>3.3 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each</p> <p>3.4 choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.5 summarise the outcome of the communication and any actions that they or their customer will take as a result</p>
<p><b>4. Know how to deal with customers in writing or electronically</b></p>	<p>4.1 explain the importance of using clear and concise language</p> <p>4.2 explain the additional significance and potential risks involved in committing a communication to a permanent record format</p> <p>4.3 describe the effects of style and tone on the reader of a written or electronic communication</p> <p>4.4 explain the importance of adapting their language to meet the needs of customers</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>who may find the communication hard to understand</p> <p>4.5 describe their organisation’s guidelines and procedures relating to written and electronic communication</p> <p>4.6 explain how to operate equipment used for producing and sending written or electronic communications</p> <p>4.7 explain the importance of keeping their customer informed if there is likely to be any delay in responding to a communication</p> <p>4.8 explain the risks associated with the confidentiality of written or electronic communications</p>

**Unit 16: Use customer service as a competitive tool**

Unit number: D/601/1228

Credit: 8

GLH: 53

Level: 3

**Unit Introduction**

Customer service contributes to an organisation’s competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and products.

The unit is not for a learner whose organisation does not compete actively with others.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Organise customer service to gain a competitive advantage</p>	<p>1.1 develop their own and colleagues’ understanding of the services and products offered by their organisation</p> <p>1.2 define their organisation’s service offer and the ways in which it compares with those of their competitors</p> <p>1.3 set an example for colleagues and present an image to their customers that reinforces their organisation’s service offer</p> <p>1.4 encourage customer service actions that create and develop customer loyalty</p>
<p>2. Deliver a competitive service</p>	<p>2.1 take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation’s service offer</p> <p>2.2 remind customers about their service offer and the extra benefit it provides over those of their competitors</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 offer additional technical advice to customers within their organisation’s service offer</p> <p>2.4 show awareness of the financial implications of any added value actions that they or their colleagues might offer</p> <p>2.5 meet customer service targets to ensure that customers see the benefit of dealing with them rather than with a competitor</p> <p>2.6 re-direct customers to other service providers without offence when their expectations cannot be met by the organisation’s service offer</p> <p>2.7 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this</p> <p>2.8 encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them</p>
<p>3. Understand how to use customer service as a competitive tool</p>	<p>3.1 identify the factors that lead to customers’ belief that they are enjoying value for money</p> <p>3.2 describe the services and products offered by their organisation</p> <p>3.3 describe the services and products offered by competitors</p> <p>3.4 identify the features and benefits of services and products that are seen by customers as added value</p> <p>3.5 explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty</p>



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.6 explain how to portray a positive image that reinforces their organisation’s competitive position</p> <p>3.7 explain their organisation’s customer service targets and cost implications of added value actions to improve the organisation’s competitive position</p> <p>3.8 describe complementary services and products that may be of interest to their customers</p>

**Unit 17: Organise the promotion of additional services or products to customers**

Unit number: D/601/1231  
 Credit: 7  
 GLH: 47  
 Level: 3

**Unit Introduction**

This unit is about expanding and extending the relationship with customers by persuading them to make use of additional services and products that the learner can offer. Services or products will remain viable only if they are used by customers. The unit covers the way the learner organises customer service to promote additional use of their services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring the successes and failures and recognising the best way to approach customers with additional services or products for the future. The learner needs to show that they are promoting the services or products by encouraging more people to use them.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Offer additional services or products	1.1 offer additional services or products to customers  1.2 identify the benefits of offering additional services or products for customers and the organisation  1.3 explain the features and benefits of additional services or products to customers  1.4 identify ways of encouraging customers to ask about additional services or products
2. Organise support to promote use of additional services or products	2.1 discuss with others, ways of promoting additional services or products to customers  2.2 implement procedures to ensure that customers interested in additional services or products are dealt with promptly  2.3 promote services or products which will suit customers but which are supplied from outside their own area of the organisation  2.4 help customers to access services or products which are supplied outside of their own area of the organisation

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Monitor the promotion of additional services or products</p>	<p>3.1 devise methods to inform customers about additional services or products</p> <p>3.2 use different methods to inform customers about additional services and products and record successes and failures against each method</p> <p>3.3 use their record of successes and failures to identify the best approach for offering additional services or products</p> <p>3.4 share information with others regarding the best approach to take when offering additional services or products to customers</p>
<p>4. Understand how to organise and promote services or products to customers</p>	<p>4.1 describe their organisation’s procedures and systems for encouraging the use of additional services or products</p> <p>4.2 explain how the use of additional services or products will benefit their customers</p> <p>4.3 describe the main factors that influence customers to use their services or products</p> <p>4.4 explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p> <p>4.5 describe how to give appropriate, balanced information to customers about services or products</p>

**Unit 18: Build a customer service knowledge set**

Unit number: K/601/1233  
 Credit: 7  
 GLH: 47  
 Level: 3

**Unit Introduction**

Effective and improving customer service may make use of a customer service knowledge set. This information base is built up continuously as the organisation learns from interaction with its customers. A knowledge set may contain a wide variety of information about customers and their transactions with the organisation. It will, in any case, rely on the actions of the learner and their colleagues in direct contact with customers to build and grow as a useful customer service tool. This unit is all about actions the learner takes to add to the information set and how they use it to develop the way they deal with customer transactions.

This unit is for a learner only if their organisation has a systematic and technology supported approach to building a customer information set.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Input details of customer queries and requests and develop responses</p>	<p>1.1 identify through active listening customer queries and comments for inclusion in the knowledge set</p> <p>1.2 classify information collected through customer contact for inclusion in the knowledge set</p> <p>1.3 identify questions frequently asked by customers</p> <p>1.4 identify the broad customer service messages of their organisation’s answers to frequently asked questions</p> <p>1.5 work with colleagues to develop responses to customer queries and requests</p> <p>1.6 contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages</p> <p>1.7 check the effects of possible responses included in the knowledge set with customers</p> <p>1.8 monitor the customer service knowledge set to identify trends and patterns</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Use a customer service knowledge base</p>	<p>2.1 access information from the customer service knowledge set using specific search criteria</p> <p>2.2 browse the customer service knowledge set to research a topic of interest or project area</p> <p>2.3 use the customer service knowledge set to inform the introduction of a new product or service variation</p> <p>2.4 use the customer service knowledge set to respond to a specific customer request or query</p> <p>2.5 assist a colleague to locate specific information in the customer service knowledge set</p> <p>2.6 add to the customer service knowledge set as a result of dealing with a customer request or query</p>
<p>3. Understand how to build a customer service knowledge set</p>	<p>3.1 explain the structure and content of their organisation’s customer service information set</p> <p>3.2 describe how to input and update routines for adding to the customer service knowledge set</p> <p>3.3 identify ways that information in a customer service knowledge set can be classified</p> <p>3.4 identify questions frequently asked by customers of their organisation</p> <p>3.5 explain the importance of working with colleagues to develop responses to customer requests and queries</p> <p>3.6 describe their organisation’s key messages in relation to the services or products they are delivering</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.7 identify ways to interpret information in a customer service knowledge set</p> <p>3.8 describe techniques for assisting a colleague to locate information in a customer service knowledge set</p>

**Unit 19: Do your job in a customer friendly way**

Unit number: A/601/1205  
 Credit: 5  
 GLH: 33  
 Level: 1

**Unit Introduction**

The customer service that the learner’s organisation gives is affected by the way they do their job. Whatever job the learner is doing, customers expect them to do it properly. They also expect the learner to consider their wishes and feelings while they are doing it. Doing their job properly involves following procedures and doing the tasks in their job correctly as well as having the appropriate relationship with customers.

This unit covers how the learner does their job with their customer in mind in a way that the organisation and supervisors find acceptable. It will help the learner to understand the parts of their job that are most important to good customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Do their job in a customer friendly way	1.1 make a good first impression  1.2 follow the dress code of their organisation and present the right personal image to their customers  1.3 do the tasks that make up their job in a way that shows they know what their customers expect and what their organisation offers  1.4 show consideration to customers when carrying out the tasks required in their job  1.5 respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague  1.6 share information with customers about how delivery of the product or service is going  1.7 work flexibly to help individual customers without reducing the level of service they give to others

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	1.8 share information with colleagues when they need it to provide good customer service
2. Know how to do their job in a customer-friendly way	2.1 describe their organisation’s dress code 2.2 describe how to do the tasks that make up their job 2.3 identify how long parts of the job take to do and how this may affect their customers 2.4 describe how to do their own work in an organised way 2.5 identify what their customers expect of them and their work 2.6 identify the organisations service offer and how this affects the way they do their work 2.7 state what they are allowed to do and not allowed to do for customers 2.8 state how to do their job in a way that is healthy and safe for them, their customers and their colleagues



**Unit 20: Deliver reliable customer service**

Unit number: J/601/1210  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Prepare to deal with customers	1.1 keep their knowledge of their organisation’s services or products up-to-date  1.2 ensure that the area they work in is tidy, safe and organised efficiently  1.3 prepare and arrange everything they need to deal with customers before their shift or period of work commences
2. Give consistent service to customers	2.1 make realistic customer service promises to customers  2.2 ensure that their promises balance the needs of their customers and their organisation  2.3 keep their promises to customers  2.4 inform their customers if they cannot keep their promises due to unforeseen circumstances  2.5 recognise when their customers’ needs or expectations have changed and adapt their service to meet the new requirements  2.6 keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Check customer service delivery</p>	<p>3.1 check that the service they have given meets their customers' needs and expectations</p> <p>3.2 identify when they could have given better service to customers and how their service could have been improved</p> <p>3.3 share information with colleagues and service partners to maintain and improve their standards of service delivery.</p>
<p>4. Know how to deliver reliable customer service</p>	<p>4.1 describe their organisation's services or products</p> <p>4.2 explain their organisation's procedures and systems for delivering customer service</p> <p>4.3 describe methods or systems for measuring an organisation's effectiveness in delivering customer service</p> <p>4.4 explain their organisation's procedures and systems for checking service delivery</p> <p>4.5 explain their organisation's requirements for health and safety in their area of work</p>

**Unit 21: Deliver customer service on your customer’s premises**

Unit number: Y/601/1213  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

Many organisations deliver a service to their customers on the customer’s own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to a customer’s property. This unit is about the process of providing a service on customer premises whilst ensuring that the customer both enjoys the customer service experience and has confidence that the work carried out has been completed successfully.

This unit is not simply about working in a different building. The learner’s customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for the learner whose job takes them into their customers’ homes.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Establish a rapport with their customer</p>	<p>1.1 prepare for a visit to customer premises and ensure the customer knows when and why they will be there</p> <p>1.2 identify themselves to their customer showing official identification whenever possible</p> <p>1.3 show a positive and friendly approach to the service they are about to give</p> <p>1.4 use language and behaviour that show respect for their customer</p> <p>1.5 explain to their customer exactly what they are going to do and approximately how long they expect the work to take</p> <p>1.6 listen to any concerns that their customer may have and reassure them</p> <p>1.7 keep their customer informed of progress and about any cause for delay that might take place</p> <p>1.8 keep their customer informed of any variation to the work that could involve additional time or cost</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>1.9 consult their customer when they have to do work that the customer had not expected</p>
<p>2. Combine customer service with their other skills and expertise</p>	<p>2.1 show respect to customer’s premises and possessions by treating them with care</p> <p>2.2 make sure their customer is aware of their specialist technical skills</p> <p>2.3 take time to give their customer confidence in their knowledge and skills</p> <p>2.4 consider the customer service implications of each action and inform their customer of what will be involved</p> <p>2.5 inform their customer when they have finished and reinforce how the work has been handled professionally</p> <p>2.6 check that their customer is satisfied with the work and listen carefully to any feedback</p> <p>2.7 inform their customer of timescales if any follow up work is involved</p> <p>2.8 ensure that timescales for follow up work are kept</p> <p>2.9 keep their customer informed if timescales for follow up work are not going to be met</p> <p>2.10 explain clearly to their customer why they cannot do work that is not specified in the service offer</p> <p>2.11 ensure that their customer has the appropriate details to contact their organisation if the customer needs to</p>
<p>3. Know how to deliver customer service on the customer’s premises</p>	<p>3.1 describe what they can do to establish a rapport with the customers</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.2 explain the importance of sensitivity to people’s feelings about their own premises and possessions</p> <p>3.3 explain the regulatory and legal restrictions on what they can and cannot do in all aspects of their work</p> <p>3.4 explain the insurance implications of working on their customer’s premises</p> <p>3.5 describe the organisational procedures they would take if they cause any accidental damage on their customer’s premises</p>

**Unit 22: Recognise diversity when delivering customer service**

Unit number: K/601/1216  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Respect customers as individuals and promote equality in customer service</p>	<p>1.1 observe verbal and non-verbal clues that provide information about their customer’s expectations and needs</p> <p>1.2 identify and avoid features of stereotypes that might be applied to their customer that could carry the risk of causing offence</p> <p>1.3 identify aspects of their customer’s appearance or communication which risk leading them to treat the customer differently</p> <p>1.4 consider aspects of their customer’s appearance or communication in the light of their own beliefs about various groups of people that include their customer</p> <p>1.5 question their customer to ensure that the impressions they are forming about their expectations and wishes are based on sound evidence</p> <p>1.6 adjust their interpretation of the customer’s expectations and wishes as a result of further evidence they have collected by talking to their customer</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Adapt customer service to recognise the different needs and expectations of diverse groups of customers</p>	<p>2.1 follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers</p> <p>2.2 show respect for their customer’s individual beliefs, expectations and needs that may result from membership of a particular group</p> <p>2.3 vary their approach to their customer to take account of beliefs, expectations and needs that result from membership of a particular group</p> <p>2.4 work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group</p>
<p>3. Understand how to recognise diversity when delivering customer service</p>	<p>3.1 explain the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status</p> <p>3.2 explain why consideration of diversity and inclusion issues affect customer service</p> <p>3.3 describe organisational guidelines to make customer service inclusive for diverse groups of customers</p> <p>3.4 explain how to observe and interpret non-verbal clues</p> <p>3.5 describe how to listen actively for clues about their customer’s expectations and needs</p> <p>3.6 identify techniques for obtaining additional information from customers through tactful and respectful questions</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	3.7 describe behaviour that might cause offence to specific groups of people to whom they regularly provide customer service  3.8 explain how to impress specific groups of people to whom they regularly provide customer service

**Unit 23: Deal with customers across a language divide**

Unit number: A/601/1219

Credit: 8  
 GLH: 53  
 Level: 2

**Unit Introduction**

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner’s customer’s first language.

The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Prepare to deal with customers with a different first language	1.1 identify the language or languages other than their own that they are most likely to come across when dealing with customers  1.2 learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter  1.3 identify a source of assistance with a language they expect to encounter when delivering customer service  1.4 agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>1.5 log useful words and phrases to support their dealings with a customer with a different first language</p> <p>1.6 learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently</p>
<p>2. Deal with customers who speak a different first language from their own</p>	<p>2.1 identify their customer’s first language and indicate to the customer that they are aware of this</p> <p>2.2 establish the expectations of the customer regarding whether they expect to deal in the learner’s first language or theirs</p> <p>2.3 speak clearly and slowly if using a language which is not the first language for either them or their customer</p> <p>2.4 maintain a consistent tone and volume when dealing with somebody across a language divide</p> <p>2.5 listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words</p> <p>2.6 check their understanding of specific words with their customer using questions for clarification</p> <p>2.7 seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers</p> <p>2.8 reword a question or explanation if their customer clearly does not understand their original wording</p> <p>2.9 use a few words of their customer’s first language to create a rapport</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Know how to deal with customers across a language divide</p>	<p>3.1 list the languages that they are most likely to encounter among groups of their customers</p> <p>3.2 state how to greet, thank and say farewell to customers in their first languages</p> <p>3.3 explain the importance of dealing with customers in their first language if possible</p> <p>3.4 describe how to explain to a customer that they cannot hold an extended conversation in their first language</p> <p>3.5 explain the importance of tone, pace and volume when dealing with customers across a language divide</p> <p>3.6 identify possible sources of assistance to use when a language barrier demands additional language skills</p>

**Unit 24: Use questioning techniques when delivering customer service**

Unit number: A/601/1222

Credit: 4  
 GLH: 27  
 Level: 2

**Unit Introduction**

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner’s organisation can deliver it.

This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction.

This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Establish rapport and identify customer concerns	1.1 greet their customer sincerely and invite a full and open response 1.2 use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry 1.3 invite more detailed explanation from their customer 1.4 listen closely to their customer’s responses to strengthen their understanding of customer concerns 1.5 use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation 1.6 identify and note their customer’s feelings and mood in relation to the information they are seeking
2. Seek detailed information from customers using questioning techniques	2.1 follow a planned trail of questions to explore in detail customer concerns they have already identified

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.2 hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified</p> <p>2.3 explain to their customer why they need the information they are asking for</p> <p>2.4 use probing and searching questions that draw on comments or words used by their customer</p> <p>2.5 thank their customer for the information in a way that encourages further open responses</p> <p>2.6 use pre-planned routing and trigger questions that lead their customer to respond in new areas</p> <p>2.7 follow organisational procedures to record customer responses to inform future actions</p>
<p>3. Understand how to use questioning techniques when delivering customer service</p>	<p>3.1 explain why establishing rapport makes it easier to draw information from customers</p> <p>3.2 describe ways to greet customers that immediately build rapport</p> <p>3.3 explain reasons for using planned question patterns to draw out particular information</p> <p>3.4 explain reasons for using spontaneous conversation to draw out particular information</p> <p>3.5 explain the importance of active listening when seeking detailed information from customers</p> <p>3.6 identify the differences between and uses of closed and open questions</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	3.7 describe the importance of explaining to customers why information is needed  3.8 explain why particular trigger questions are effective in gaining specific information

**Unit 24: Deal with customers using bespoke software**

Unit number: L/601/1225  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Prepare to deliver customer service using bespoke software	1.1 sign on and open access to appropriate functions in the IT system  1.2 navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas  1.3 explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver  1.4 ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed  1.5 prepare their work area to deliver customer service using bespoke software
2. Deliver customer service using bespoke software	2.1 identify their customer or the services or products they wish to access  2.2 follow organisational procedures to step through the system in a way that responds to their customer’s needs

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 use search or other specialist functions within the software to respond to customer requests</p> <p>2.4 enter new records using the bespoke software system</p> <p>2.5 amend customer service records in the bespoke software system</p> <p>2.6 communicate with their customers in terms they can understand relating to the software system</p> <p>2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software</p> <p>2.8 interpret error messages and act on them to support their customer service</p> <p>2.9 refer their customer to a colleague following organisational procedures if they are unable to complete the transaction</p>
<p>3. Understand how to deal with customers using bespoke software</p>	<p>3.1 describe access and sign-on routines for the bespoke software system</p> <p>3.2 describe the architecture and geography of the bespoke software system</p> <p>3.3 identify different screen or menu routes that can be followed to meet customer requirements</p> <p>3.4 identify sources of support and help for the bespoke software including manuals, help screens and help lines</p> <p>3.5 explain the importance of preparing a work area before delivering customer service</p> <p>3.6 explain search or other enquiry facilities within the bespoke software system</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.7 state the importance of avoiding jargon and system terminology when communicating with customers</p> <p>3.8 describe ways to respond to error messages when using a bespoke software system</p> <p>3.9 identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system</p>



**Unit 26: Maintain customer service through effective handover**

Unit number: Y/601/1227  
 Credit: 4  
 GLH: 27  
 Level: 2

**Unit Introduction**

Customer service delivery in a team involves many situations when the learner is unable to see actions through and they pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern. Most of all the learner needs to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with their colleagues that customer service actions have been completed.

This unit is for a learner whose job involves service delivery as part of a team and who regularly passes on responsibility for completion of a customer service action to a colleague.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Agree joint responsibilities in a customer service team</p>	<p>1.1 identify services or products they are involved in delivering that rely on effective teamwork</p> <p>1.2 identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues</p> <p>1.3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another</p> <p>1.4 agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action</p> <p>1.5 identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action</p>
<p>2. Check that customer service actions are seen through by working together with colleagues</p>	<p>2.1 access reminders to identify when to check that a customer service action has been completed</p> <p>2.2 ensure that they are aware of all details of customer service actions their colleague was due to complete</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 ask their colleague about the outcome of them completing the customer service action as agreed</p> <p>2.4 identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed</p> <p>2.5 work with colleagues to review the way in which customer service actions are shared</p>
<p>3. Understand how to maintain customer service through effective handover</p>	<p>3.1 explain their organisation’s customer service procedures for the services or products they are involved in delivering</p> <p>3.2 identify the appropriate colleagues to pass responsibility to for completing particular customer service actions</p> <p>3.3 describe ways of ensuring that information is passed between them and their colleagues effectively</p> <p>3.4 identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague</p> <p>3.5 explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting</p> <p>3.6 identify opportunities for contributing to review the way customer service actions are shared in customer service processes</p>

**Unit 27: Deliver customer service using service partnerships**

Unit number: H/601/1229

Credit: 6

GLH: 40

Level: 3

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Work effectively within a customer service chain</p>	<p>1.1 explain who is involved in the service chain that supplies their end user customers</p> <p>1.2 identify which of those involved in their service chain is internal and which is external to their organisation</p> <p>1.3 explain how the way they work with individual service partners contributes to an overall service chain</p> <p>1.4 use the principles and practices applied to external customers to deliver excellent customer service to internal customers</p> <p>1.5 work with internal customers and internal or external suppliers in the service chain to improve service to external customers</p> <p>1.6 communicate effectively with internal customers to ensure that those customers are aware of any aspects of their work that might affect them</p>
<p>2. Build and nurture positive relationships in a customer service chain</p>	<p>2.1 create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone’s roles in the service chain</p> <p>2.2 identify where power and authority exist within the service chain</p> <p>2.3 negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.4 develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship</p> <p>2.5 work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation</p> <p>2.6 agree with service partners how their work will be prioritised if there is a conflict of interest between the demands of internal and external customers</p>
<p>3. Understand how to deliver customer service using service partnerships</p>	<p>3.1 describe the responsibilities and rights that can be built into an internal customer/supplier relationship</p> <p>3.2 compare the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership</p> <p>3.3 explain how to establish priorities if internal customer demands conflict with external customer demands</p> <p>3.4 describe how to maintain team identity whilst working constructively with other teams to deliver excellent customer service</p> <p>3.5 explain how to negotiate successfully with internal customers or suppliers</p> <p>3.6 evaluate the formal and informal structures of the organisation and how they can influence relationships</p>

**Unit 28: Organise the delivery of reliable customer service**

Unit number: Y/601/1230  
 Credit: 6  
 GLH: 40  
 Level: 3

**Unit Introduction**

This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which support the service that they give. In the learner’s job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Plan and organise the delivery of reliable customer service	1.1 plan, prepare and organise everything they need to deliver services or products to different types of customers  1.2 organise what they do to ensure that they are consistently able to give prompt attention to your customers  1.3 reorganise their work to respond to unexpected additional workloads
2. Review and maintain customer service delivery	2.1 maintain service delivery during very busy periods and unusually quiet periods  2.2 maintain service delivery when systems, people or resources have let them down  2.3 consistently meet their customers’ expectations  2.4 balance the time they take with their customers with the demands of other customers seeking their attention  2.5 respond appropriately to their customers when customers make comments about the products or services they are offering  2.6 alert others to repeated comments made by their customers

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.7 take action to improve the reliability of their service based on customer comments</p> <p>2.8 monitor the action they have taken to identify improvements in the service they give to their customers</p>
<p>3. Use recording systems to maintain reliable customer service</p>	<p>3.1 record and store customer service information accurately following organisational guidelines</p> <p>3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format</p> <p>3.3 quickly locate information that will help solve a customer's query</p> <p>3.4 supply accurate customer service information to others using the most appropriate method of communication</p>
<p>4. Understand how to organise the delivery of reliable customer service</p>	<p>4.1 describe organisational procedures for unexpected situations and their role within them</p> <p>4.2 describe resource implications in times of staff sickness and holiday periods and their responsibility at these times</p> <p>4.3 explain the importance of having reliable and fast information for their customers and their organisation</p> <p>4.4 evaluate the organisational procedures and systems for delivering customer service</p> <p>4.5 Identify useful customer feedback and explain how to decide which feedback should be acted on</p> <p>4.6 describe how to communicate feedback from customers to others</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	4.7 evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information  4.8 explain the legal and regulatory requirements regarding the storage of data

**Unit 29: Improve the customer relationship**

Unit number: H/601/1232  
 Credit: 7  
 GLH: 47  
 Level: 3

**Unit Introduction**

To improve relationships with their customers, learners need to deliver consistent and reliable customer service. In addition, customers need to feel that the learner genuinely wants to give them high levels of service and that the learner makes every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. The learner needs to be proactive in their dealings with their customers and to respond professionally in all situations. The learner needs to negotiate between their customers and their organisation or department in order to find some way of meeting their customers’ expectations. In addition, the learner needs to make extra efforts to delight their customers by exceeding customer service expectations.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Improve communication with their customers	1.1 select and use the best method of communication to meet their customers’ expectations  1.2 take the initiative to contact their customers to update them when things are not going to plan or when they require further information  1.3 adapt their communication to respond to individual customers’ feelings
2. Balance the needs of their customer and their organisation	2.1 meet their customers’ expectations within their organisation’s service offer  2.2 explain the reasons to their customers sensitively and positively when customer expectations cannot be met  2.3 identify alternative solutions for their customers either within or outside the organisation  2.4 identify the costs and benefits of these solutions to their organisation and to their customers



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation</p> <p>2.6 take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation</p>
<p>3. Exceed customer expectations to develop the relationship</p>	<p>3.1 make extra efforts to improve their relationship with their customers</p> <p>3.2 recognise opportunities to exceed their customers' expectations</p> <p>3.3 take action to exceed their customers' expectations within the limits of their own authority</p> <p>3.4 gain the help and support of others to exceed their customers' expectations</p>
<p>4. Understand how to improve the customer relationship</p>	<p>4.1 describe how to make best use of the method of communication chosen for dealing with their customers</p> <p>4.2 explain how to negotiate effectively with their customers</p> <p>4.3 explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make</p> <p>4.4 explain the importance of customer loyalty and/or improved internal customer relationships to their organisation</p>

**Unit 30: Recognise and deal with customer queries, requests and problems**

Unit number: M/601/1508  
 Credit: 5  
 GLH: 33  
 Level: 1

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Know how to recognise and deal with customer queries, requests and problems</p>	<p>3.1 list who in the organisation is able to give help and information</p> <p>3.2 state the limits of what they are allowed to do</p> <p>3.3 identify what professional behaviour is</p> <p>3.4 describe how to speak to people who are dissatisfied</p> <p>3.5 describe how to deal with difficult people</p> <p>3.6 state what customers normally expect</p> <p>3.7 identify how to recognise a problem from what a customer says or does</p> <p>3.8 describe what kinds of behaviours/actions would make situations worse</p> <p>3.9 list the organisational procedures they must follow when they deal with problems or complaints</p> <p>3.10 identify the types of behaviour that may make a problem worse</p>

**Unit 31: Take details of customer service problems**

Unit number: T/601/1509  
 Credit: 4  
 GLH: 27  
 Level: 1

**Unit Introduction**

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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
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

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Pass details of problems raised by customers to the colleague who can deal with them</p>	<p>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</p> <p>3.2 gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications</p> <p>3.3 tell their customer what they will do with the details of the problem so that action is taken</p> <p>3.4 tell their customer what to expect without making customer service promises that may not be met</p> <p>3.5 pass the details to a colleague who is able to deal with the problem</p>
<p>4. Know how to take details of customer service problems</p>	<p>4.1 identify customer expectations of the organisation's services or products that may cause problems if they are not met</p> <p>4.2 describe how to respond to customers who raise problems in a way that the customers will find calm and helpful</p> <p>4.3 name reference codes or identifiers their organisation uses to identify customers</p> <p>4.4 identify questions that can be used to gather information that will be most helpful in resolving a problem</p> <p>4.5 state details their organisation needs to resolve a problem</p> <p>4.6 describe details their organisation uses to identify specific customer transactions</p> <p>4.7 name the appropriate colleagues to whom details of problems should be passed</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	4.8 identify their organisation's preferences for the way in which details of problems should be passed on

**Unit 32: Resolve customer service problems**

Unit number: M/601/1511  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner’s job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer’s expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right.

This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Spot customer service problems	1.1 listen carefully to customers about any problem they have raised  1.2 ask customers about the problem to check their understanding  1.3 recognise repeated problems and alert the appropriate authority  1.4 share customer feedback with others to identify potential problems before they happen  1.5 identify problems with systems and procedures before they begin to affect customers
2. Pick the best solution to resolve customer service problems	2.1 identify the options for resolving a customer service problem  2.2 work with others to identify and confirm the options to resolve a customer service problem

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 work out the advantages and disadvantages of each option for their customer and the organisation</p> <p>2.4 pick the best option for their customer and the organisation</p> <p>2.5 identify for their customer other ways that problems may be resolved if they are unable to help</p>
<p>3. Take action to resolve customer service problems</p>	<p>3.1 discuss and agree the options for solving the problem with their customer</p> <p>3.2 take action to implement the option agreed with their customer</p> <p>3.3 work with others and their customer to make sure that any promises related to solving the problem are kept</p> <p>3.4 keep their customer fully informed about what is happening to resolve the problem</p> <p>3.5 check with their customer to make sure the problem has been resolved to the customer's satisfaction</p> <p>3.6 give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction</p>
<p>4. Know how to resolve customer service problems</p>	<p>4.1 describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 explain how to defuse potentially stressful situations</p> <p>4.3 describe how to negotiate</p> <p>4.4 identify the limitations of what they can offer their customer</p>



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	4.5 describe types of action that may make a customer problem worse and should be avoided

**Unit 33: Deliver customer service to difficult customers**

Unit number: T/601/1512  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

Many organisations have a significant proportion of difficult customers. The customer’s attitude may be difficult simply because they believe that a threat or problem exists before they contact the organisation. They may become difficult or even aggressive when they discover that their expectations are not going to be met by the organisation. They may be very concerned or nervous about the outcome of dealing with the organisation. In either case, they are difficult to deal with and need the learner’s understanding. This unit is about dealing directly with these customers and trying to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. The learner should choose this unit only if they recognise the content as applying to a reasonable proportion of their exchanges with customers. Do not choose this unit if it will be hard to find evidence because the learner only occasionally deals with a difficult customer.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Recognise when customers may be difficult to deal with	1.1 recognise types of customer behaviour that are difficult to deal with  1.2 identify aspects of their organisation’s services or products that make it difficult to deal with customers  1.3 identify the signs and signals that indicate a customer may be difficult to deal with  1.4 put themselves in their customer’s position and see the situation from the customer’s point of view  1.5 identify reasons why their customers may be behaving in a way that is difficult to deal with  1.6 recognise the limits of difficult customer behaviour that their organisation will tolerate  1.7 identify things that they may do or say that will provoke difficult responses from their customer

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Deal with difficult customers</p>	<p>2.1 listen patiently to what their customer wants to tell them</p> <p>2.2 use direct and factual questions about their customer’s feelings and what has happened to identify what might satisfy the customer</p> <p>2.3 check their understanding of their customer’s concerns by describing their view of the situation and options that might be available</p> <p>2.4 express empathy with their customer without necessarily admitting fault on the part of their organisation</p> <p>2.5 give clear statements or explanations of their organisation’s position</p> <p>2.6 agree a way forward that balances customer satisfaction with the needs of their organisation</p> <p>2.7 enlist help from colleagues if options for action are outside of their authority</p> <p>2.8 summarise clearly actions to be taken and reasons for those actions to complete the customer transaction</p> <p>2.9 advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them</p> <p>2.10 take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer</p>
<p>3. Understand how to deliver customer service to difficult customers</p>	<p>3.1 describe the types of customer behaviour that they personally find difficult to deal with</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.2 identify reasons why some aspect of their organisation’s services or products may provoke difficult behaviour from customers</p> <p>3.3 identify reasons why their customer’s own actions may cause them to behave in a way that is difficult to deal with</p> <p>3.4 explain the meaning of having empathy for a customer’s feelings</p> <p>3.5 identify who can be asked for help when dealing with a difficult customer</p> <p>3.6 explain the difference between assertive, aggressive and passive behaviour</p> <p>3.7 describe the importance of not simply quoting their organisation’s rules and procedures to counter their customer’s difficult behaviour</p> <p>3.8 state their organisation’s limits of what will be tolerated from difficult customers before the transaction or relationship is closed</p> <p>3.9 explain the importance of giving their manager or the appropriate colleagues notice of any further approaches from a difficult customer</p> <p>3.10 identify when it might be necessary to take action to protect their own safety or that of other customers or colleagues from a difficult customer</p>

**Unit 34: Monitor and solve customer service problems**

Unit number: J/601/1515  
 Credit: 6  
 GLH: 40  
 Level: 3

**Unit Introduction**

The learner’s job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Solve immediate customer service problems	1.1 respond positively to customer service problems following organisational guidelines 1.2 solve customer service problems when they have sufficient authority 1.3 work with others to solve customer service problems 1.4 keep customers informed of the actions being taken 1.5 check with customers that they are comfortable with the actions being taken 1.6 solve problems with service systems and procedures that might affect customers before customers become aware of them 1.7 inform managers and colleagues of the steps taken to solve specific problems
2. Identify repeated customer service problems and options for solving them	2.1 identify repeated customer service problems 2.2 identify the options for dealing with a repeated customer service problem and

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>consider the advantages and disadvantages of each option</p> <p>2.3 work with others to select the best option for solving a repeated customer service problem,</p>
<p>3. Take action to avoid the repetition of customer service problems</p>	<p>3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated</p> <p>3.2 action their agreed solution</p> <p>3.3 keep their customers informed in a positive and clear manner of steps being taken to solve any service problems</p> <p>3.4 monitor the changes they have made and adjust them if appropriate</p>
<p>4. Understand how to monitor and solve customer service problems</p>	<p>4.1 describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 describe the organisational procedures and systems for identifying repeated customer service problems</p> <p>4.3 explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers</p> <p>4.4 explain how to negotiate with and reassure customers while their problems are being solved</p>

**Unit 35: Apply risk assessment to customer service**

Unit number: D/601/1519  
 Credit: 10  
 GLH: 67  
 Level: 3

**Unit Introduction**

This unit is about how formal or informal risk assessment techniques can be used to reduce any risks involved in the provision of customer service. The provision of customer service involves a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables the learner to take actions to minimise risks.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>Analyse customer service processes for risk</b></p>	<ul style="list-style-type: none"> <li>1.1 Show that they know and understand their organisation’s customer service process and identify the moments of truth (those points in the customer service process that have most impact on the customer experience)</li> <li>1.2 identify the financial risks for each stage of the customer service process</li> <li>1.3 identify the reputational risks for each stage of the customer service process</li> <li>1.4 identify the health and safety risks for each stage of the customer service process</li> <li>1.5 identify the risk of delivering sub-standard services or products for each stage of the customer service process</li> <li>1.6 ensure that your customers are aware of any risks that might impact on them develop staff awareness of the risks they have identified</li> </ul>
<p><b>2. Assess customer service risks and take appropriate actions</b></p>	<ul style="list-style-type: none"> <li>2.1 assess the probabilities of each risk that they have identified</li> <li>2.2 assess the consequence of each risk in terms of finance, reputation and health and safety</li> </ul>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 classify each risk as high, medium or low taking into account its probability and consequences</p> <p>2.4 work with colleagues to identify any actions that might be taken to reduce risk</p> <p>2.5 take appropriate actions to minimise the overall customer service risk profile by adapting procedures</p>
<p><b>3. Understand how to apply risk assessment to customer service</b></p>	<p>3.1 describe risk assessment techniques</p> <p>3.2 explain how to evaluate risk according to probability of occurrence and consequences of occurrence</p> <p>3.3 evaluate the nature of potential customer service risks including financial, reputational and health and safety risks</p> <p>3.4 explain cost/benefit analysis</p> <p>3.5 define SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis</p>



**Unit 36: Process customer service problems**

Unit number: D/601/1522  
 Credit: 6  
 GLH: 40  
 Level: 3

**Unit Introduction**

This unit is about the process of handling complaints. In any customer service situation, a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case the learner’s customer expects them to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. The learner’s organisation may have detailed and formal procedures for dealing with complaints.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Recognise the signs that a query or problem is about to produce a complaint</b></p>	<p>1.1 identify signs that a customer is becoming dissatisfied with the customer service of their organisation</p> <p>1.2 take action to change the situation so that the query or problem does not result in a complaint</p> <p>1.3 take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made</p>
<p><b>2. Deal with a complaint effectively</b></p>	<p>2.1 ensure that they have a clear understanding of the nature and details of the complaint</p> <p>2.2 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint</p> <p>2.3 identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation</p> <p>2.4 assess the risks to their organisation of choosing each option</p> <p>2.5 report the findings of their investigation to their customer and offer their chosen solution</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.6 escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so</p> <p>2.7 give feedback to other colleagues involved which will help them avoid future complaints</p> <p>2.8 keep clear records of the way the complaint has been handled to avoid later misunderstandings</p>
<p><b>3. Understand how to process customer service complaints</b></p>	<p>3.1 explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery</p> <p>3.2 explain why dealing with complaints is an inevitable part of delivering customer service</p> <p>3.3 describe organisational procedures for dealing with complaints</p> <p>3.4 explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation</p> <p>3.5 explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported</p> <p>3.6 explain when to escalate a complaint by involving more senior members of the organisation or an independent third party</p> <p>3.7 explain the cost and regulatory implications of admitting liability for an error made by their organisation</p> <p>3.8 identify how to spot and interpret signals that their customer may be considering making a complaint</p> <p>3.9 describe techniques for handling conflict</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.10 explain the importance of dealing with a complaint promptly</p> <p>3.11 explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint</p> <p>3.12 explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied</p>

**Unit 37: Develop customer relationships**

Unit number: T/601/1526  
 Credit: 6  
 GLH: 40  
 Level: 2

**Unit Introduction**

When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer’s confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation’s service and being comfortable with it. The learner’s customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Build their customer’s confidence that the service they give will be excellent</b></p>	<p>1.1 show that they behave assertively and professionally with customers</p> <p>1.2 allocate the time they take to deal with their customer following organisational guidelines</p> <p>1.3 reassure their customer that they are doing everything possible to keep the service promises made by the organisation</p>
<p><b>2. Meet the expectations of their customers</b></p>	<p>2.1 recognise when there may be a conflict between their customer’s expectations and your organisation’s service offer</p> <p>2.2 balance their customer’s expectations with their organisation’s service offer by offering an alternative or explaining the limits of the service offer</p> <p>2.3 work effectively with others to resolve any difficulties in meeting their customer’s expectations</p>
<p><b>3. Develop the long-term relationship between their customer and their organisation</b></p>	<p>3.1 give additional help and information to their customer in response to customer questions and comments about their organisation’s services or products</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.2 discuss expectations with their customer and explain how these compare with their organisation’s services or products</p> <p>3.3 advise others of feedback received from their customer</p> <p>3.4 identify new ways of helping customers based on the feedback customers have given them</p> <p>3.5 identify added value that their organisation could offer to long-term customers</p>
<p><b>4. Know how to develop customer relationships</b></p>	<p>4.1 describe their organisation’s services or products</p> <p>4.2 explain the importance of customer retention</p> <p>4.3 explain how their own behaviour affects the behaviour of the customer</p> <p>4.4 describe how to behave assertively and professionally with customers</p> <p>4.5 describe how to defuse potentially stressful situations</p> <p>4.6 identify the limitations of their organisation’s service offer</p> <p>4.7 compare how customer expectations may change as the customer deals with their organisation</p> <p>4.8 identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations</p> <p>4.9 explain the cost implications of bringing in new customers as opposed to retaining existing customers</p> <p>4.10 identify who to refer to when considering any variation to their organisation’s service offer</p>

**Unit 38: Support customer service improvements**

Unit number: A/601/1530  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. The learner’s job involves delivering customer service. If the organisation has decided to make changes, it is the learner’s job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved. This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Use feedback to identify potential customer service improvements</b></p>	<p>1.1 gather informal feedback from their customers</p> <p>1.2 use their organisation’s procedures to collect feedback from their customers</p> <p>1.3 use the information from their customers to develop a better understanding of their customer service experience</p> <p>1.4 identify ways the service they give could be improved based on information they have gathered</p> <p>1.5 share their ideas for improving customer service with colleagues</p>
<p><b>2. Implement changes in customer service</b></p>	<p>2.1 identify a possible change that could be made to improve customer service</p> <p>2.2 present their idea for improving customer service to a colleague with the appropriate authority to approve the change</p> <p>2.3 carry out changes to customer service procedures based on their own idea or proposed by their organisation</p> <p>2.4 keep their customers informed of changes to customer service</p> <p>2.5 give customers a positive impression of changes that have been made</p> <p>2.6 work positively with others to support customer service changes</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>3. Assist with the evaluation of changes in customer service</b></p>	<p>3.1 discuss with others how changes to customer service are working</p> <p>3.2 work with others to identify any negative effects of changes and how these can be avoided</p>
<p><b>4. Know how to support customer service improvements</b></p>	<p>4.1 explain how customer experience is influenced by the way service is delivered</p> <p>4.2 identify how customer feedback is obtained</p> <p>4.3 explain how to work with others to identify and support change in the way service is delivered</p> <p>4.4 describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them</p>

### Unit 39: Develop personal performance through delivering customer service

Unit number: R/601/1534

Credit: 6

GLH: 40

Level: 2

#### Unit Introduction

Delivering customer service presents many opportunities for learning and for developing personal skills. This unit is about how the learner can develop their personal skills at the same time as improving their customer service performance. The learner will need to plan together with a manager or mentor and then carry out activities which help the learner learn and develop in their customer service role. Customer service improvements rely on continuous improvement and this includes improving the learner’s own skills.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Review performance in their customer service role</b></p>	<p>1.1 work with an appropriate person to establish what they need to know, understand and be able to do to work effectively in their customer service role</p> <p>1.2 identify and review situations from their own positive and negative experiences as a customer</p> <p>1.3 carry out a self-assessment of their performance in their customer service role and identify their strengths, weaknesses and development needs</p>
<p><b>2. Prepare a personal development plan and keep it up to date</b></p>	<p>2.1 agree their strengths, weaknesses and development needs with an appropriate person</p> <p>2.2 work with an appropriate person to draw up their own development objectives to improve their performance in their customer service role</p> <p>2.3 develop a customer service personal development plan</p> <p>2.4 regularly review their progress towards their objectives with an appropriate person</p>



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>3. Undertake development activities and obtain feedback on their customer service performance</b></p>	<p>3.1 complete development activities identified in their customer service personal development plan</p> <p>3.2 use their day to day experiences with their customers and their own experiences as a customer to develop their customer service performance</p> <p>3.3 obtain feedback from an appropriate person about their customer service performance</p> <p>3.4 review and update their customer service personal development plan</p>
<p><b>4. Understand how to develop their personal performance through delivering customer service</b></p>	<p>4.1 describe their organisation’s systems and procedures for developing personal performance in customer service</p> <p>4.2 explain how their behaviour has an effect on the behaviour of others</p> <p>4.3 explain how effective learning depends on a process of planning, doing and reviewing</p> <p>4.4 describe how to review effectively their personal strengths and development needs</p> <p>4.5 describe how to put together a personal development plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service</p> <p>4.6 explain how to access sources of information and support for their learning</p> <p>4.7 explain how to obtain useful and constructive personal feedback from others</p> <p>4.8 describe how to respond positively to personal feedback</p>

**Unit 40: Support customers using on-line customer services**

Unit number: H/601/1540  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve the learner in understanding what the customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if the learner’s customer is unable to discover how it can deliver what they want. This unit is for the learner if one part of their job involves helping customers to find their way through on-line systems.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Establish the type and level of support their customer needs to achieve on-line customer service</b></p>	<p>1.1 ensure that they are up-to-date and with the on-line services that their customers use</p> <p>1.2 identify what the customer is trying to achieve and what they are having difficulties with</p> <p>1.3 question their customer to discover the customer’s degree of familiarity with the system</p> <p>1.4 offer their customer the option of trying the on-line approach once more</p> <p>1.5 agree with their customer the exact nature of the problem and steps that may be taken to overcome it</p>
<p><b>2. Support on-line customer service in conversation with their customer</b></p>	<p>2.1 explore the on-line customer system in order to develop their own knowledge and skills in its use</p> <p>2.2 step through the screen sequence with their customer whilst allowing them to operate the system for themselves</p> <p>2.3 address their customer in an understanding and supportive manner</p> <p>2.4 explain to their customer why certain steps are required in the process</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 offer the options to their customer of stepping them through the process or completing the transaction themselves</p> <p>2.6 promote access to additional services or products when supporting customers on-line</p>
<p><b>3. Understand how to support customers using on-line services</b></p>	<p>3.1 explain how their organisation’s system for on-line service delivery works</p> <p>3.2 describe the importance of close active listening to discover what their customer is trying to achieve</p> <p>3.3 identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system</p> <p>3.4 explain why it is generally preferable for their customer to complete a transaction for themselves</p> <p>3.5 explain the importance of building customer confidence in using the on-line system by supporting and encouraging</p> <p>3.6 compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves</p> <p>3.7 identify additional services or products that may be promoted to on-line customers</p>

**Unit 41: Buddy a colleague to develop their customer service skills**

Unit number: M/601/1542  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

In customer service roles, it is often useful to have a ‘buddy’ relationship with somebody who has more experience of the same customer service situation. If someone is asked to buddy a colleague who is learning customer service aspects of their job, they will need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside their colleague and providing them with constructive feedback and support. Someone does not need to be more senior than their colleague or their supervisor to act as a customer service buddy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Plan and prepare to buddy a colleague</b></p>	<p>1.1 agree with their colleague aspects of the colleague’s work which may benefit most from their buddying support</p> <p>1.2 confirm their understanding of their colleague’s job tasks and responsibilities using reliable sources</p> <p>1.3 clarify the customer service image and impression their colleague should present in their job</p> <p>1.4 arrange times when it will be most helpful to work alongside their colleague</p> <p>1.5 plan details of a buddy session to support their colleague on the job</p>
<p><b>2. Support their buddy colleague on the job</b></p>	<p>2.1 agree with their colleague where they will be placed near them when buddying them on the job</p> <p>2.2 ensure their presence when their buddy is dealing with customers does not detract from effective customer service</p> <p>2.3 carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow</p> <p>2.4 observe their colleague closely to identify what they do well and areas in which they could improve</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement</p> <p>2.6 praise their colleague on aspects of work which they have carried out well</p> <p>2.7 explain to their colleague ways in which they can improve their customer service performance</p> <p>2.8 make notes on their colleague’s strengths and areas for development that they can discuss with their colleague</p>
<p><b>3. Provide buddy support off the job</b></p>	<p>3.1 arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers</p> <p>3.2 identify areas of general interest that help to establish rapport with their buddy colleague</p> <p>3.3 use notes made when observing their colleague to discuss positive and negative aspects of their colleague’s performance</p> <p>3.4 agree actions their buddy colleague can take to improve their customer service performance</p> <p>3.5 offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience</p>
<p><b>4. Understand how to buddy a colleague to develop their customer service skills</b></p>	<p>4.1 identify the tasks in their buddy colleague’s job</p> <p>4.2 identify areas of the job that benefit most from buddying support</p> <p>4.3 describe the customer service image and impression that should be presented in their buddy colleague’s job</p> <p>4.4 identify the best times at which to work alongside their buddy colleague</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>4.5 identify ways to work alongside their buddy colleague without intruding on the customer relationship</p> <p>4.6 describe techniques for giving positive feedback and constructive criticism to their buddy colleague</p> <p>4.7 explain the importance of establishing an effective rapport with their buddy colleague</p> <p>4.8 review options for actions their buddy colleague can take to improve their customer service performance</p>

**Unit 42: Develop your own customer service skills through self-study**

Unit number: R/601/1548

Credit: 6

GLH: 40

Level: 2

**Unit Introduction**

Much of the responsibility for developing customer service knowledge and skills rests on the learner as an individual. There are numerous sources of information that can be used but which need to be located and linked with their customer service role. When located, the learning materials must be used to good effect in an organised manner. This unit is about locating and using materials to help the learner learn in the course of their work. It is the right unit for a learner who needs to take responsibility for their own self-development in relation to customer service skills.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Find ways to learn more about customer service and their job</b></p>	<p>1.1 identify different sources of information and support that will help them to develop their customer service knowledge and skills</p> <p>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</p> <p>1.3 take action to remind themselves to check on sources of information and support</p> <p>1.4 search for additional sources of information to support their customer service learning</p> <p>1.5 store materials that support self-study for future use</p> <p>1.6 plan time to study the self-study materials they have collected</p>
<p><b>2. Use sources of self-development to extend their customer service skills and knowledge</b></p>	<p>2.1 access organisational update information to extend their knowledge of products and services</p> <p>2.2 access organisational information to learn more about the way their role contributes to customer service</p> <p>2.3 monitor publications to identify ideas and new developments in customer service which they could apply in their work</p> <p>2.4 study collected information to develop their own customer service knowledge and skills</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 take action resulting from their learning to change the way they deal with customers</p> <p>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 further options</p> <p>2.7 record actions they take to learn more about customer service and identify those which have the most positive effects</p>
<p><b>3. Know how to develop their own customer service skills through self-study</b></p>	<p>3.1 describe ways to locate information updating them on services and products in their information</p> <p>3.2 identify sources of information about customer service knowledge and skills that will help them to develop</p> <p>3.3 list ways to store information that they use to develop their customer service skills</p> <p>3.4 describe the importance of focus when self-studying to improve their customer service knowledge and skills</p> <p>3.5 identify ways to convert information or ideas they have found through self-study into practical customer service action</p> <p>3.6 identify the value of discussing their learning with their line manager, their mentor or others doing a similar job</p> <p>3.7 evaluate methods of recording actions to improve their customer service skills which have had positive effects</p>



**Unit 43: Support customers using self-service technology**

Unit number: Y/601/1549  
 Credit: 5  
 GLH: 33  
 Level: 2

**Unit Introduction**

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, the learner must be able to recognise what help and intervention is needed and to provide that in a way that pleases their customer and builds their confidence in the use of the equipment.

This unit is right for the learner if any part of their job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Identify the type of help needed by a customer using self-service technology</b></p>	<p>1.1 prepare a standard demonstration of using the self-service equipment</p> <p>1.2 prepare to answer frequently asked questions about the operation of the self-service equipment</p> <p>1.3 identify signs of when a customer is having difficulty with the self-service equipment</p> <p>1.4 choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment</p>
<p><b>2. Assist a customer using self-service technology</b></p>	<p>2.1 maintain a professional, polite and approachable manner while they observe customers using self-help technology</p> <p>2.2 demonstrate use of the self-service equipment to a customer</p> <p>2.3 respond to a request for help from a customer using self-help equipment</p> <p>2.4 make use of staff override options to clear self-service equipment for use by customers</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.5 talk a customer through use of the self-service equipment whilst allowing them to operate it</p> <p>2.6 invite a customer to repeat the operation of the self-service equipment if that helps them to learn</p> <p>2.7 make positive and encouraging comments to a customer who is learning to use the self-service equipment</p> <p>2.8 explain to their customer why certain actions and steps are needed to operate self service equipment</p> <p>2.9 troubleshoot problems with self-service equipment and report errors and issues to appropriate people</p>
<p><b>3. Understand how to support customers using self-service technology</b></p>	<p>3.1 explain why their organisation chooses to offer customers self-service equipment</p> <p>3.2 explain all aspects of normal operation of the customer self-service equipment</p> <p>3.3 state frequently asked questions about operation of the self-service equipment and effective answers to those questions</p> <p>3.4 describe techniques for giving an effective demonstration of self-service equipment</p> <p>3.5 identify signals and signs that a customer needs help with self-service equipment</p> <p>3.6 describe organisational procedures for using staff intervention to clear self-service equipment</p> <p>3.7 explain the importance of building customer confidence in using self-service equipment</p> <p>3.8 describe organisational procedures for dealing with self-service equipment problems</p>

**Unit 44: Work with others to improve customer service**

Unit number: D/601/1553  
 Credit: 8  
 GLH: 53  
 Level: 3

**Unit Introduction**

Teamwork is a key component of delivering and improving excellent customer service. The people the learner works with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on their skills and those of others. It involves communicating with each other and agreeing how they can work together to give a more effective service. They all need to work together positively. The learner must also monitor their own and the team’s performance and change the way they do things if that improves customer service. This unit is about how the learner develops a relationship with others to improve their customer service performance.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Improve customer service by working with others</b></p>	<p>1.1 contribute constructive ideas for improving customer service</p> <p>1.2 identify what they have to do to improve customer service and confirm this with others</p> <p>1.3 agree with others what they have to do to improve customer service</p> <p>1.4 co-operate with others to improve customer service</p> <p>1.5 keep their commitments made to others</p> <p>1.6 make others aware of anything that may affect plans to improve customer service</p>
<p><b>2. Monitor their own performance when improving customer service</b></p>	<p>2.1 discuss with others how what they do affects customer service performance</p> <p>2.2 identify how the way they work with others contributes towards improving customer service</p>
<p><b>3. Monitor team performance when improving customer service</b></p>	<p>3.1 discuss with others how teamwork affects customer service performance</p> <p>3.2 work with others to collect information on team customer service performance</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>3.3 identify with others how customer service teamwork could be improved</p> <p>3.4 take action with others to improve customer service performance</p>
<p><b>4. Understand how to work with others to improve customer service</b></p>	<p>4.1 describe who else is involved either directly or indirectly in the delivery of customer service</p> <p>4.2 describe the roles and responsibilities of others in their organisation</p> <p>4.3 describe the roles of others outside their organisation who have an impact on their services or products</p> <p>4.4 evaluate what the goals or targets of their organisation are in relation to customer service and how these are set</p> <p>4.5 evaluate how their organisation identifies improvements in customer service</p>

**Unit 45 Promote continuous improvement**

Unit number: H/601/1554  
 Credit: 7  
 GLH: 47  
 Level: 3

**Unit Introduction**

This unit covers the key competence of the customer service professional. The learner must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. The learner will need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Plan improvements in customer service based on customer feedback</b></p>	<p>1.1 gather feedback from customers that will help to identify opportunities for customer service improvement</p> <p>1.2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes</p> <p>1.3 discuss with others the potential effects of any proposed changes for their customers and their organisation</p> <p>1.4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change</p>
<p><b>2. Implement changes in customer service</b></p>	<p>2.1 organise the implementation of authorised changes</p> <p>2.2 implement the changes following organisational guidelines</p> <p>2.3 inform people inside and outside their organisation who need to know of the changes being made and the reasons for them</p> <p>2.4 monitor early reactions to changes and make appropriate fine-tuning adjustments</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>3. Review changes to promote continuous improvement</b></p>	<p>3.1 collect and record feedback on the effects of changes</p> <p>3.2 analyse and interpret feedback and share their findings on the effects of changes with others</p> <p>3.3 summarise the advantages and disadvantages of the changes</p> <p>3.4 use their analysis and interpretation of changes to identify opportunities for further improvement</p> <p>3.5 present these opportunities to somebody with sufficient authority to make them happen</p>
<p><b>4. Understand how to promote continuous improvement</b></p>	<p>4.1 review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements</p> <p>4.2 explain how customer experience is influenced by the way service is delivered</p> <p>4.3 explain how to collect, analyse and present customer feedback</p> <p>4.4 explain how to make a business case to others to bring about change in the products or services they offer</p>

**Unit 46: Develop your own and others’ customer service skills**

Unit number: K/601/1555  
 Credit: 8  
 GLH: 53  
 Level: 3

**Unit Introduction**

This unit is about taking responsibility for continuously developing the learner’s own customer service skills and passing those skills on to others. It is about helping themselves and others to learn and grow in their customer service roles. The learner may not be a manager or a supervisor but they may be responsible for showing others how things work and what they need to do. For example, a new member of staff may need an introduction to the products, services, systems or procedures of their organisation and the learner may be asked to show them. Or the learner may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that the learner is asked to learn about and present or demonstrate to others. This unit will help the learner to put ‘showing others’ into a formal framework that will help them to learn and improve their own coaching skills. The delivery of excellent customer service depends on the learner’s skills and the skills of those around them.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Develop their own customer service skills</b></p>	<p>1.1 agree with a manager or mentor the specific customer service skills they need in their customer service role</p> <p>1.2 agree the actions they need to take to improve their customer service skills</p> <p>1.3 draw up a personal development plan based on their agreed actions to improve their customer service skills</p> <p>1.4 carry out their personal development activities and review their progress</p> <p>1.5 obtain feedback from their manager or mentor about their customer service performance and update their personal development plan</p>
<p><b>2. Plan the coaching of others in customer service</b></p>	<p>2.1 identify and agree with colleagues’ specific customer service skills and knowledge those colleagues need in their customer service role</p> <p>2.2 identify opportunities for colleagues to take actions to develop their customer service skills</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.3 plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills</p>
<p><b>3. Coach others in customer service</b></p>	<p>3.1 coach colleagues to develop specific and agreed customer service skills</p> <p>3.2 give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence</p> <p>3.3 regularly check the progress of colleagues and modify their coaching as appropriate</p> <p>3.4 give regular feedback to colleagues about the progress they are making</p> <p>3.5 explain clearly to colleagues how ongoing support will be provided</p>
<p><b>4. Understand how to develop their own and others' customer service skills</b></p>	<p>4.1 describe organisational systems and procedures for developing their own and others' personal performance in customer service</p> <p>4.2 explain how their behaviour impacts on others</p> <p>4.3 explain how to review effectively their personal strengths and development needs</p> <p>4.4 describe how to put together a personal development plan for themselves or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service</p> <p>4.5 explain how to obtain useful and constructive personal feedback from others</p> <p>4.6 describe how to respond positively to personal feedback</p> <p>4.7 describe how to put together a coaching plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service and their job role</p>



Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	4.8 explain how to give useful and constructive personal feedback to others  4.9 describe how to help others to respond positively to personal feedback

**Unit 47: Lead a team to improve customer service**

Unit number: H/601/1568

Credit: 7

GLH: 47

Level: 3

**Unit Introduction**

If the learner is responsible for leading a team delivering customer service, they need to plan and organise the team’s work and support team members as they develop their performance. This unit is about looking at both the learner’s organisation and their staffing resources and bringing these together in a constructive way to improve overall customer service. The learner will need to give support and guidance to their team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with their colleagues and staff team. It is about leading by example.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Plan and organise the work of a team</b></p>	<p>1.1 treat team members with respect at all times</p> <p>1.2 agree with team members their role in delivering effective customer service</p> <p>1.3 involve team members in planning and organising their customer service work</p> <p>1.4 allocate work which takes full account of team members’ customer service skills and the objectives of the organisation</p> <p>1.5 motivate team members to work together to raise their customer service performance</p>
<p><b>2. Provide support for team members</b></p>	<p>2.1 check that team members understand what they have to do to improve their work with customers and why that is important</p> <p>2.2 check with team members what support they feel they may need throughout this process</p> <p>2.3 provide team members with support and direction when they need help</p> <p>2.4 encourage team members to work together to improve customer service</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>3. Review performance of team members</b></p>	<p>3.1 provide sensitive feedback to team members about their customer service performance</p> <p>3.2 encourage team members to discuss their customer service performance</p> <p>3.3 discuss sensitively with team members action they need to take to continue to improve their customer service performance</p>
<p><b>4. Understand how to lead a team to improve customer service</b></p>	<p>4.1 describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation</p> <p>4.2 explain how team and individual performance can affect the achievement of organisational objectives</p> <p>4.3 explain the implications of failure to improve customer service for their team members and their organisation</p> <p>4.4 describe how to plan work activities</p> <p>4.5 explain how to present plans to others to gain understanding and commitment</p> <p>4.6 explain how to facilitate meetings to encourage frank and open discussion</p> <p>4.7 explain how to involve and motivate staff to encourage teamwork</p> <p>4.8 describe how to recognise and deal sensitively with issues of underperformance</p>

**Unit 48: Gather, analyse and interpret customer feedback**

Unit number: H/601/1571

Credit: 10

GLH: 67

Level: 3

**Unit Introduction**

Customer service can be improved only if the learner is fully aware of customer wishes and expectations. The learner can discover much of this information by seeking structured feedback from their customers about the customer’s experiences of the learner’s services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is about how the learner collects that feedback and prepares it for use in the improvement of customer service.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Plan to gather customer feedback</b></p>	<p>1.1 identify the options available for collecting customer service feedback</p> <p>1.2 evaluate the costs and benefits of each option for collecting customer feedback</p> <p>1.3 select one or more methods for collecting customer feedback</p> <p>1.4 plan in detail what information they will collect from customers</p> <p>1.5 ensure the information they collect all has a customer service focus</p> <p>1.6 plan in detail how they will collect information from customers using their chosen method</p>
<p><b>2. Gather customer feedback</b></p>	<p>2.1 use their chosen method and detailed plan to collect customer feedback</p> <p>2.2 monitor the collection of customer feedback to ensure it is falling within their chosen sampling frame</p> <p>2.3 monitor the collection of customer feedback to ensure it focuses on customer service issues</p> <p>2.4 record the data they collect in a way that makes analysis and interpretation easy</p> <p>2.5 respect their customers' rights to confidentiality if the customers do not want their comments to be identified</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>3. Analyse and interpret customer feedback</b></p>	<p>3.1 collate data collected from customers in order to identify patterns and trends in customer service</p> <p>3.2 perform appropriate calculations to summarise patterns and trends in the data</p> <p>3.3 present their analysis in a form that is easily understood</p> <p>3.4 link their analysis with their knowledge of their organisation's service offer and customer service processes in order to interpret the meaning of the data</p> <p>3.5 make recommendations for changes in their organisation's service offer or customer service processes in response to the views of their customers</p> <p>3.6 identify ways in which customer feedback can be used to inform customers and develop the customer relationship</p>
<p><b>4. Understand how to gather, analyse and interpret customer feedback</b></p>	<p>4.1 explain random sampling techniques and how to evaluate bias in non-random samples</p> <p>4.2 identify principles of questionnaire design</p> <p>4.3 identify principles of effective interviewing</p> <p>4.4 explain how to calculate the cost of a customer survey</p> <p>4.5 describe techniques for monitoring data collection</p> <p>4.6 explain how to use appropriate software to record and analyse customer feedback</p> <p>4.7 describe methods of displaying and presenting data in a way that is easy to understand</p> <p>4.8 explain statistical techniques for summarising trends and patterns</p> <p>4.9 describe organisational procedures for recommending changes in the service offer or customer service procedures</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	4.10 compare the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail

**Unit 49: Monitor the quality of customer service transactions**

Unit number: T/601/1574  
 Credit: 7  
 GLH: 47  
 Level: 3

**Unit Introduction**

The quality of customer service transactions must be monitored if they are to benefit from actions to improve that overall quality. Quality in this area can be defined only in terms of agreed criteria and against agreed performance ratings. In an organisation that carries out a high volume of customer service transactions delivered face-to-face, by telephone or on-line, quality can be measured and improved only by adopting a systematic sampling approach. Spot checks and routine checks are needed to observe individual performance and results must be analysed to identify patterns and trends. Improvement can then occur as a result of feedback the learner gives to colleagues so that actions to improve individual performance can be taken. This unit is for the learner if one of their job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p><b>1. Prepare to monitor the quality of customer service transactions</b></p>	<p>1.1 identify the criteria against which quality of customer service transactions will be monitored</p> <p>1.2 agree a sampling frame for monitoring customer service transactions</p> <p>1.3 follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed</p> <p>1.4 identify ratings and scales against which quality of customer service transactions can be measured</p> <p>1.5 ensure that they are totally familiar with the customer service procedures for transactions they are monitoring</p>
<p><b>2. Monitor the quality of customer service transactions</b></p>	<p>2.1 carry out spot checks on or observations of the quality of customer service transactions</p> <p>2.2 carry out planned and routine checks on or observations of the quality of customer service transactions</p> <p>2.3 observe or listen to a colleague dealing with a customer service transaction</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>2.4 record their observations of a colleague’s performance against agreed quality criteria</p> <p>2.5 make judgements about their colleague’s quality of service delivery by allocating a performance rating against a defined and agreed rating scale</p> <p>2.6 analyse and summarise their observations to identify patterns and trends in their colleague’s performance</p>
<p><b>3. Give feedback on the quality of customer service transactions</b></p>	<p>3.1 engage with their colleague in preparation for giving feedback on the quality of their customer service delivery</p> <p>3.2 provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well</p> <p>3.4 give feedback to their colleague regarding features of their customer service delivery that would benefit from development</p> <p>3.5 propose actions for coaching or training of a colleague in areas that would improve their customer service delivery</p> <p>3.6 maintain records of customer service quality monitoring and action plans for improvements</p>
<p><b>4. Understand how to monitor the quality of customer service transactions</b></p>	<p>4.1 review the criteria against which the quality of customer service delivery is judged in their organisation</p> <p>4.2 describe ways to construct a representative sample of customer service transactions in order to monitor quality</p> <p>4.3 explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service</p> <p>4.4 explain how to define ratings and scales against which customer service transactions can be judged</p>




Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>4.5 explain their organisation’s procedures and guidelines for customer service delivery</p> <p>4.6 describe ways to record details of customer service transactions they have observed in order to provide feedback</p> <p>4.7 describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery</p> <p>4.8 explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement</p> <p>4.9 describe sources of information about coaching and training options to improve customer service delivery</p> <p>4.10 explain the importance of keeping detailed records of coaching and training relating to customer service delivery</p>

### 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 criteria.

We listen and respond 

**Evidence Tracking Sheet - Example**

Learner Name			
Centre Name			
<b>Unit 1: Unit name (Unit no)</b>			
Knowledge Assessment Criteria			
Learning Outcome	Assessment Criteria	Evidence Type	Evidence Reference
1.	1.1	Obs	1
2.	2.1	D, W	2
	2.2	Sim	3, 5
4.	4.1	Q, D	8

**Assessment method key:**

Obs	Observation	W	Witness
P	Product evidence	R	Review
Q	Questioning	O	Oral
Sim	Simulation/assignment	PD	Professional Discussion

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor Signature \_\_\_\_\_ Date: \_\_\_\_\_

IQA Signature (if sampled) \_\_\_\_\_ Date: \_\_\_\_\_

EQS Signature (if sampled) \_\_\_\_\_ Date: \_\_\_\_\_

Once all assessment criteria and range have been met, the learner and assessor must sign and date this tracking sheet

Fill in each assessment method used using the key

Fill in the portfolio reference for each assessment criteria

Insert the date that the Assessment Criteria was fully met

If sampled, the IQA/EQS must also sign and date this tracking sheet