



Qualification Specification

HABC Level 2 Diploma in Customer Service (QCF)

Qualification Number: 601/4026/4

Highfield House
Heavens Walk
Lakeside
Doncaster
South Yorkshire
DN4 5HZ
United Kingdom

Tel +44 08452260350
Tel +44 01302363277
Fax +44 08452260360

Info@highfieldabc.com
www.highfieldabc.com

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HABC Level 2 Diploma in Customer Service (QCF)

Introduction

This qualification specification is designed to outline all you need to know in order to offer this qualification in your centre. If you have any further questions, please contact your HABC Account Manager.

Qualification details

The HABC Level 2 Diploma in Customer Service (QCF) has been accredited by the regulators of England and Wales (Ofqual and the Welsh Government) and is part of the Qualifications and Credit Framework (QCF).

It is supported by Skills CFA, the Sector Skills Council for occupations in business and administration, customer service, enterprise and business support, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector).

Key facts

Qualification Number:	601/4026/4
Learning Aim Reference:	60140264
Guided learning hours (GLH):	245-305
Credit Value:	45
Assessment Method:	Portfolio of evidence

Qualification overview

This qualification is designed for learners who wish to improve their knowledge and skills in the customer service sector. It is designed for learners who deal with customers on a daily basis as part of their job role and is applicable to a variety of work environments.

The qualification can be taken on a standalone basis or as part of a larger programme of study. It forms the both the knowledge and competency requirements of the Intermediate Apprenticeship in Customer Service.

Entry requirements

Although there are no formal entry requirements to register on to this standalone qualification, HABC recommend learners have level 1 in both English and mathematics, this will also support those learners who undertaking this qualification as part of an Apprenticeship programme.

Qualification structure

In order to achieve the qualification, learners must achieve the **minimum** of **45 credits** from the following:

- all units within Mandatory Group A totalling **19** credits
- a **minimum** of **3** credits from Optional Group B
- a **minimum** of **16** credits from Optional Group C
- a **maximum** of **7 credits** from Optional Group D

Full details relating to the Rules of Combination for this qualification can be found in Appendix 1 of this specification. All units are contained in Appendix 2.

Delivery/assessment ratios

In order to effectively deliver and assess this qualification, centres are recommended not to exceed the ratio of 1 qualified tutor/assessor to 12 learners in any one instance. If centres wish to increase this ratio, they must first request approval from HABC.

Guidance on delivery

The minimum guided learning hours (GLH) for this qualification are between 245 and 305, depending on which optional units are chosen. The GLH may be adjusted in accordance with learners' needs and/or local circumstances.

Guidance on assessment

This qualification is assessed through completion of a portfolio of evidence which will be internally assessed and internally quality assured by the Centre. Suggested paperwork is available to download from the HABC website. If a Centre would like to use alternative paperwork, this must be sent to the Quality Support team for approval.

Guidance on quality assurance

HABC require Centres to have in place a robust mechanism for internal quality assurance. Internal quality assurance must be completed by an appropriately qualified person and that person must not have been involved in any aspect of the delivery or assessment of the course they are quality assuring. EQS visits from HABC will take place until direct claim status is achieved. HABC will support Centre's with quality assurance by conducting engagement visits to ensure and verify the effective and efficient delivery, assessment and IQA of qualifications.

Centre requirements

In order to effectively deliver this qualification, centres must have adequate resources in place that will allow learners to meet the learning outcomes.

Age ranges

This qualification is approved for delivery to learners aged 16+.

Geographical coverage

These qualifications are suitable for learners in England, Wales and Northern Ireland.

Assessor requirements

The primary responsibility of an assessor is to assess learners' performance in a range of tasks and to ensure the evidence submitted by the learner meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as having in-depth technical understanding related to the qualifications for which they are assessing learners. It is therefore a requirement that assessors must:

- Have occupational experience in the qualification sector; and
- Hold the HABC Level 3 Award in Assessing Competence in the Work Environment (QCF) or above or hold a recognised equivalent e.g. Units D32/33, A1/A2.

Important Note: Assessors who are working towards an appropriate assessing qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.

Internal Quality Assurance (IQA) requirements

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It is therefore a requirement that IQAs must:

- Have occupational experience in the qualification sector; and
- Hold the HABC Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice (QCF) or higher or hold a recognised equivalent e.g. Unit D34.

Important Note: IQA who are working towards an appropriate IQA qualification must ensure their decisions are countersigned by a suitably-qualified verifier and should be supported by a qualified IQA throughout their training period.

Reasonable adjustments and special considerations

HABC has measures in place for learners who require additional support. Please see the HABC Reasonable Adjustments Policy.

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. See the HABC Core Manual for further details.

Progression

Upon successful completion learners may wish to continue their development via the completion of any of the following signposted qualifications/training:

- HABC Level 3 Diploma in Customer Service (QCF)
- HABC Level 2 Diploma in Business Administration (QCF)
- HABC Level 3 Diploma in Business Administration (QCF)
- HABC Level 2 Diploma in Team Leading (QCF)
- HABC Level 3 Diploma in Management (QCF)

Useful websites

- Skills CFA <http://www.skillsca.org>
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Appendix 1: Rules of Combination

In order to achieve the HABC **Level 2 Diploma in Customer Service (QCF)** learners must achieve a minimum of **45 credits** overall. In order to complete this learners must achieve the following rules of combination:

- **all units** in Mandatory Group **A** totaling **19 credits**
- a **minimum of 3 credits** from Optional Group **B**
- a **minimum of 16 credits** from Optional Group **C**
- a **maximum of 7 credits** from Optional Group **D**

Mandatory Group A

Learners must achieve **all units** in this group, totalling **19 credits**.

Unit reference	Unit Title	Level	Credit
A/506/2130	Deliver customer service	2	5
F/506/2131	Understand customers	2	2
J/506/2132	Principles of customer service	2	4
A/506/1964	Understand employer organisations	2	4
L/506/1788	Manage personal performance and development	2	4

Optional Group B

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

Unit reference	Unit Title	Level	Credit
D/506/2119	Communicate verbally with customers	2	3
T/506/2126	Communicate with customers in writing	2	3

Optional Group C

Learners must achieve a **minimum of 16 credits** from this group.

Unit reference	Unit Title	Level	Credit
H/506/2154	Deal with incoming telephone calls from customers	2	3
K/506/2155	Make telephone calls to customers	2	3
L/506/2133	Promote additional products and/or services to customers	2	2
R/506/2134	Process information about customers	2	3
Y/506/2135	Exceed customer expectations	2	3
T/506/2143	Deliver customer service whilst working on customer's premises	2	4
T/506/2157	Carry out customer service handovers	2	3
A/506/2158	Resolve customer service problems	2	5
F/506/2159	Deliver customer service to challenging customers	2	3

Unit reference	Unit Title	Level	Credit
Y/506/2149	Develop customer relationships	2	3
T/506/2160	Support customer service improvements	2	3
A/506/2161	Support customers through real-time online customer service	2	3
H/506/2977	Support customers using self-service equipment	2	3
J/506/2163	Use social media to deliver customer service	2	3
K/506/2978	Provide post-transaction customer service	2	5
R/506/2151	Resolve customers' complaints	3	4
D/506/2170	Gather, analyse and interpret customer feedback	3	5

Optional Group D

Learners must achieve a **maximum of 7 credits** from this group.

Unit reference	Unit Title	Level	Credit
T/505/4673	Health and safety procedures in the workplace	2	2
L/506/1807	Manage diary systems	2	2
H/506/1814	Provide reception services	2	3
L/506/1869	Contribute to the organisation of an event	2	3
M/506/1895	Buddy a colleague to develop their skills	2	3
L/506/1905	Employee rights and responsibilities	2	2
R/506/1789	Develop working relationships with colleagues	2	3
J/506/1806	Principles of equality and diversity in the workplace	2	2
M/502/8587	Processing sales orders	2	2
R/502/8601	Meeting customers' after sales needs	2	3
M/502/8606	Handling objections and closing sales	2	3
K/503/0421	Deal with incidents through a contact centre	2	7
L/503/0394	Carry out direct sales activities in a contact centre	2	5
H/506/1912	Negotiate in a business environment	3	4
F/502/4396	Bespoke Software	2	3

Appendix 2: All Units

Unit 1: Deliver customer service

Unit number: A/506/2130

Credit: 5

GLH: 27

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand customer service delivery	1.1. Explain the relationship between customers' needs and expectations and customer satisfaction 1.2. Describe the features and benefits of an organisation's products and/or services 1.3. Explain the importance of treating customers as individuals 1.4. Explain the importance of balancing promises made to customers with the needs of an organisation 1.5. Explain when and to whom to escalate problems 1.6. Describe methods of measuring their own effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1. Explain the importance of a brand to an organisation 2.2. Explain how a brand affects an organisation's customer service offer 2.3. Explain the importance of using customer service language that supports a brand promise 2.4. Identify their own role in ensuring that a brand promise is delivered
3. Be able to prepare to deal with customers	3.1. Keep up to date with an organisation's products and/or services 3.2. Prepare resources that are necessary to deal with customers before starting work

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
4. Be able to provide customer service	4.1. Maintain organisational standards of presentation and behaviour when providing customer service 4.2. Adapt their own behaviour to meet customers' needs or expectations 4.3. Respond to customers' requests in line with organisational guidelines 4.4. Inform customers of the progress of their requests 4.5. Confirm that customers' expectations have been met in line with the service offer 4.6. Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5. Be able to support improvements to customer service delivery	5.1. Identify ways that customer service could be improved for an organisation and individuals 5.2. Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Unit 2: Understand customers

Unit number: F/506/2131

Credit: 2

GLH: 17

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand different types of customers	1.1. Explain the distinctions between internal and external customers 1.2. Explain how cultural factors can affect customers' expectations 1.3. Describe the characteristics of challenging customers 1.4. Explain how to identify dissatisfied customers
2. Understand the value of customers and their loyalty	2.1. Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2. Explain the relationship between customer satisfaction and organisational performance 2.3. Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4. Explain the potential consequences of customers' dissatisfaction 2.5. Describe different methods of attracting customers and retaining their loyalty

Unit 3: Principles of customer service

Unit number: J/506/2132

Credit: 4

GLH: 34

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand customer service	1.1. Explain the purpose and scope of customer service 1.2. Define the term “service offer” 1.3. Explain the value of a “service offer” to an organisation 1.4. Explain the importance of delivering consistently high quality customer service 1.5. Explain the importance of keeping up to date with knowledge of competitors’ activities 1.6. Explain barriers to providing effective customer service 1.7. Describe the features of effective follow-up service
2. Understand how legal and ethical requirements relate to customer service	2.1. Describe how sales and consumer-related legislation and regulations affect the delivery of customer service 2.2. Describe how health, safety and environmental legislation affects customer service delivery 2.3. Explain how ethical considerations affect customer service 2.4. Explain how equality legislation affects customer service 2.5. Describe how legislation affects the use and storage of customer information

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Understand how to deliver effective customer service</p>	<p>3.1. Explain the difference between customers' wants, needs and their expectations</p> <p>3.2. Explain how to identify customers' needs and expectations</p> <p>3.3. Explain the importance of managing customers' expectations</p> <p>3.4. Explain how to behave in a way that meets customers' expectations</p> <p>3.5. Describe techniques that can be used to put customers at ease and gain their trust</p> <p>3.6. Explain the importance of following up actions and keeping promises when delivering customer service</p>
<p>4. Understand the management of customer service information</p>	<p>4.1. Explain how customer service information can be used</p> <p>4.2. Explain the importance of systems to manage customer service information</p> <p>4.3. Explain the uses of systems to manage customer service information</p> <p>4.4. Identify the features of an effective customer complaints process</p> <p>4.5. Describe the uses of a customer complaints process</p>

Unit 4: Understand employer organisations

Unit number: A/506/1964

Credit: 4

GLH: 40

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand organisational structures	1.1. Explain the differences between the private sector, public sector and voluntary sector 1.2. Explain the functions of different organisational structures 1.3. Describe the features of different types of legal structures for organisations
2. Understand the organisational environment	2.1. Describe the internal and external influences on organisations 2.2. Explain the use of different models of analysis in understanding the organisational environment 2.3. Explain why change in the business environment is important

Unit 5: Manage personal performance and development

Unit number: L/506/1788

Credit: 4

GLH: 18

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to manage personal performance	1.1. Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2. Agree criteria for measuring progress and achievement with line manager 1.3. Complete tasks to agreed timescales and quality standards 1.4. Report problems beyond their own level of competence and authority to the appropriate person 1.5. Take action needed to resolve any problems with personal performance
2. Be able to manage their own time and workload	2.1. Plan and manage workloads and priorities using time management tools and techniques 2.2. Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3. Explain the benefits of achieving an acceptable “work-life balance”

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Be able to identify their own development needs</p>	<p>3.1. Identify organisational policies relating to personal development</p> <p>3.2. Explain the need to maintain a positive attitude to feedback on performance</p> <p>3.3. Explain the potential business benefits of personal development</p> <p>3.4. Identify their own preferred learning style(s)</p> <p>3.5. Identify their own development needs from analyses of the role, personal and team objectives</p> <p>3.6. Use feedback from others to identify their own development needs</p> <p>3.7. Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs</p>
<p>4. Be able to fulfil a personal development plan</p>	<p>4.1. Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2. Make use of formal development opportunities that are consistent with business needs</p> <p>4.3. Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4. Review progress against agreed objectives and amend plans accordingly</p> <p>4.5. Share lessons learned with others using agreed communication methods</p>

Unit 6: Communicate verbally with customers

Unit number: D/506/2119

Credit: 3

GLH: 14

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to communicate verbally with customers	1.1. Explain the importance of effective communication in customer service 1.2. Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience 1.3. Explain why “customer service language” is used 1.4. Describe different questioning techniques that can be used when communicating with customers 1.5. Describe verbal and non-verbal signals that show how a customer may be feeling 1.6. Describe the types of information needed when communicating verbally with customers

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Be able to use customer service language to communicate with customers</p>	<p>2.1. Identify customers’ wants and priorities</p> <p>2.2. Listen “actively” to what customers are saying</p> <p>2.3. Communicate clearly, concisely and professionally with customers</p> <p>2.4. Use a tone of voice and expression that reinforces messages when communicating with customers</p> <p>2.5. Use language that reinforces empathy with customers</p> <p>2.6. Adapt their response in accordance with customers’ changing behaviour</p> <p>2.7. Provide information and advice that meets customers’ needs</p> <p>2.8. Maintain organisational standards of behaviour and communication when interacting with customers</p> <p>2.9. Check that customers have understood what has been communicated</p> <p>2.10. Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers</p>

Unit 7: Communicate with customers in writing

Unit number: T/506/2126

Credit: 3

GLH: 20

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to communicate with customers in writing	1.1. Explain why it is necessary to use different forms of written communication for different purposes 1.2. Describe practices for producing different forms of written communications 1.3. Describe the potential benefits and limitations associated with communicating with customers in writing 1.4. Explain the implications of confidentiality and data protection in communicating with customers in writing
2. Be able to plan written communications to customers	2.1. Identify the objective(s) of the communication 2.2. Gather the information needed to draft the communication 2.3. Select the form of written communication that is most likely to lead to customer satisfaction within the service offer
3. Be able to communicate with customers in writing	3.1. Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2. Use language that is clear and concise, adapting it to meet identified customer needs 3.3. Record decisions and actions taken and the reasons for them 3.4. Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing.

Unit 8: Deal with incoming telephone calls from customers

Unit number: H/506/2154

Credit: 3

GLH: 16

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to deal with incoming customer calls	1.1. Explain why an organisation should have guidance on dealing with telephone calls 1.2. Explain why an organisation should have an identity checking process 1.3. Explain the importance of keeping customer information up to date 1.4. Explain the importance of keeping customers informed of the progress of their call 1.5. Describe how body language and facial expressions can be detected over the telephone 1.6. Describe different questioning techniques used when dealing with incoming calls 1.7. Explain how to handle abusive calls
2. Be able to establish the purpose of incoming customer calls	2.1. Verify the identity of callers in line with organisational guidelines 2.2. Speak clearly, concisely and politely using speech and tone to create a rapport 2.3. Adapt their own communication style to meet customers' needs 2.4. Listen actively to what customers are saying to collect as much information as possible 2.5. Use questioning techniques that are appropriate to the conversation 2.6. Record information in line with organisational guidelines

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Be able to deal with customer questions and requests</p>	<p>3.1. Respond in a way that best meets customer and organisational requirements</p> <p>3.2. Give clear and concise information that meets customers' needs</p> <p>3.3. Manage the length of the conversation</p> <p>3.4. Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>3.5. Complete agreed post-call follow up actions</p>

Unit 9: Make telephone calls to customers

Unit number: K/506/2155

Credit: 3

GLH: 16

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to make telephone calls to customers	1.1. Explain the legislation and regulations relating to the use of customer information when planning to make calls 1.2. Explain the importance of keeping customer information up to date 1.3. Explain the reasons for organisational guidance on dealing with telephone calls 1.4. Explain the reasons for organisational identity checking processes 1.5. Explain how body language and facial expressions can be detected over the telephone 1.6. Describe different questioning techniques when dealing with customers 1.7. Explain organisational guidelines for what can and cannot be said or promised 1.8. Explain how to handle abusive calls from customers
2. Be able to plan telephone calls to customers	2.1. Identify the objective(s) of calls 2.2. Prepare the information needed to make calls 2.3. Plan the structure of calls 2.4. Identify customers' likely responses and how they can be dealt with

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Be able to make telephone calls to customers</p>	<p>3.1. Use telecommunications equipment in accordance with organisational standards</p> <p>3.2. Confirm the identity of customers in line with organisational guidelines</p> <p>3.3. Make the customer aware of the purpose of the call as early as possible</p> <p>3.4. Speak clearly, concisely and politely, using speech and tone to create rapport</p> <p>3.5. Adapt their own communication style to meet customers' needs</p> <p>3.6. Listen actively to what customers are saying to collect as much information as possible</p> <p>3.7. Give clear and concise information that meets customers' needs</p> <p>3.8. Record information in line with organisational guidelines</p> <p>3.9. Complete agreed follow up actions after closing the telephone call</p>

Unit 10: Promote additional products and/or services to customers

Unit number: L/506/2133

Credit: 2

GLH: 14

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the promotion of additional products and/or services to customers	1.1. Describe organisational policies and procedures on the promotion of additional products and/or services 1.2. Explain the importance of keeping product/service knowledge up to date 1.3. Explain how to match products and/or services to customer needs 1.4. Describe techniques to promote additional products and/or services
2. Be able to promote additional products and/or services to customers	2.1. Identify opportunities to promote additional products and/or services that are likely to improve the customer experience 2.2. Promote the benefits of additional products and/or services that are likely to be of interest to customers 2.3. Provide information to customers that will help them to decide whether to select additional products and/or services 2.4. Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

Unit 11: Process information about customers

Unit number: R/506/2134

Credit: 3

GLH: 14

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to process customer information	1.1. Describe the functions of customer information systems 1.2. Explain the way in which legislation and regulatory requirements affect the processing of customer information 1.3. Explain different responsibilities and levels of authority for processing customer service information 1.4. Explain the reliability of sources of customer information 1.5. Explain the validity of customer information
2. Be able to process customer information	2.1. Record information about customers in line with organisational standards and procedures 2.2. Keep customer information up to date 2.3. Respond to requests for customer information from authorised people in a timely manner 2.4. Retrieve customer information that meets the requirements of the request 2.5. Supply customer information in a format appropriate for the recipient 2.6. Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

Unit 12: Exceed customer expectations

Unit number: Y/506/2135

Credit: 3

GLH: 15

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to exceed customer expectations	1.1. Explain how customers form expectations of the service they will receive 1.2. Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3. Explain the types of actions that customers are likely to perceive as adding value 1.4. Explain how to recognise when actions taken to offer added value could be built into the service offer
2. Be able to exceed customer expectations	2.1. Identify differences between customers' expectations and needs and the service offer 2.2. Explain the service offer clearly and concisely to customers 2.3. Identify options that offer added value without affecting other customers adversely 2.4. Make offers to customers within their own authority levels 2.5. Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer 2.6. Record agreements made and actions taken

Unit 13: Deliver customer service whilst working on customers' premises

Unit number: T/506/2143

Credit: 4

GLH: 20

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to deliver customer service whilst working on customers' premises	1.1. Describe the preparations that need to be made prior to a visit 1.2. Explain the importance of being positive about the product and/or service 1.3. Explain organisational standards of presentation, behaviour and communication 1.4. Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed 1.5. Explain how to identify possible risks relating to the work to be carried out 1.6. Explain the way in which legislation affects the work to be carried out
2. Be able to deliver customer service whilst working on customers' premises	2.1. Identify themselves to customers 2.2. Take action to ensure that customers know when, why and for how long work will be carried out on their premises 2.3. Confirm with customers the nature of work to be carried out on their premises 2.4. Keep customers informed of progress, delays, variations to work to be carried out and follow up needed 2.5. Treat customers, their premises and property with consideration 2.6. Confirm that the customer is satisfied with the outcome 2.7. Maintain their own personal safety and security and that of customers whilst on customers' premises

Unit 14: Carry out customer service handovers

Unit number: T/506/2157

Credit: 3

GLH: 15

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the customer service handover process	1.1. Explain an organisation’s customer service handover procedures 1.2. Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues 1.3. Explain why, when and how to set reminders to follow up on actions handed over to others 1.4. Explain levels of their own responsibility in the customer service handover process
2. Be able to plan customer service handovers	2.1. Identify the steps in the customer service delivery process that rely on exchanges of information among team members 2.2. Agree with colleagues when to pass customer service issues from one person to another 2.3. Agree methods of information exchange
3. Be able to carry out customer service handovers	3.1. Explain to customers to whom and why a handover is being made 3.2. Exchange information with colleagues in line with organisational procedures 3.3. Check that actions required by others following handovers have been completed 3.4. Identify further actions when the activities required by others have not been completed 3.5. Share feedback with colleagues to make improvements to handover processes

Unit 15: Resolve customer service problems

Unit number: A/506/2158

Credit: 5

GLH: 22

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the resolution of customer service problems	1.1. Describe an organisation’s customer service and complaints procedures 1.2. Describe techniques to identify customer service problems and their causes 1.3. Describe techniques to deal with situations where customers become agitated or angry 1.4. Explain the limits of their own authority for resolving customers’ problems and making promises 1.5. Explain the purpose of encouraging customers to provide feedback 1.6. Describe methods used to encourage customers to provide feedback

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
2. Be able to resolve customer service problems	2.1. Identify the nature and cause of customer service problems 2.2. Identify workable options for resolving problems within organisational guidelines 2.3. Use the most appropriate method of communication for dealing with customers 2.4. Agree with customers the option that best meets their needs and those of the organisation 2.5. Keep customers informed of progress 2.6. Fulfil promises made to customers during the resolution process 2.7. Share customer feedback with others to improve the resolution of customer service problems 2.8. Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
3. Be able to manage unresolved customer service problems	3.1. Explain to customers the reasons why problems cannot be resolved 3.2. Refer customers to other sources of help if their problems cannot be resolved

Unit 16: Deliver customer service to challenging customers

Unit number: F/506/2159

Credit: 3

GLH: 16

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the delivery of customer service to challenging customers	1.1. Describe different types of challenging customers in the customer service environment 1.2. Explain an organisation’s procedures and standards of behaviour for dealing with challenging customers 1.3. Explain behaviours that make it challenging to deal with customers 1.4. Explain the difference between assertive and aggressive behaviour 1.5. Describe techniques to deal with customers’ challenging behaviour 1.6. Explain their own levels of authority for agreeing actions outside the service offer 1.7. Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Be able to deal with challenging customers</p>	<p>2.1. Identify the signs that indicate that a customer is challenging</p> <p>2.2. Express understanding of customers' point of view without admitting liability</p> <p>2.3. Explain to customers the limits of the service they can offer</p> <p>2.4. Explain to customers the reasons for an organisation's position and policy</p> <p>2.5. Agree a way forward that balances customer satisfaction and organisational needs</p> <p>2.6. Obtain help from colleagues when options for action are beyond their level of authority</p> <p>2.7. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers</p>

Unit 17: Develop customer relationships

Unit number: Y/506/2149

Credit: 3

GLH: 18

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to develop customer relationships	1.1. Describe the importance of developing relationships with customers 1.2. Explain the value of customer loyalty and retention 1.3. Explain how customers' expectations may change over time 1.4. Explain the use of customer feedback as a means of developing customer relationships 1.5. Explain the limits of their own authority to make alternative service offers to customers 1.6. Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7. Explain the importance of regular communication in the development of both internal and external customer relationships
2. Be able to develop relationships with customers	2.1. Give help and information that meets or exceeds customers' expectations 2.2. Identify new ways of helping customers based on their feedback 2.3. Share feedback from customers with others 2.4. Identify added value that the organisation could offer customers 2.5. Bring to customers' attention products or services that may interest them

Unit 18: Support customer service improvements

Unit number: T/506/2160

Credit: 3

GLH: 12

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to support customer service improvements	1.1. Describe different sources of information that may help identify ways of improving customer service 1.2. Describe the constraints on suggesting improvements to customer service 1.3. Explain the limits of their own authority in implementing improvements
2. Be able to identify the potential for improvements to customer service	2.1. Use information from a range of sources to understand the customer experience 2.2. Identify potential areas where customer service could be improved from an analysis of information 2.3. Make recommendations for improvement that are based on evidence from analysed information
3. Be able to support the implementation of improvements to customer service	3.1. Implement agreed improvements within the limits of their own authority 3.2. Inform customers of improvements to customer service 3.3. Identify the impact of improvements to customer service and feedback to relevant people

Unit 19: Support customers through real-time online customer service

Unit number: A/506/2161

Credit: 3

GLH: 15

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to support customers through real-time online customer service	1.1. Explain how an organisation’s online customer service system works 1.2. Explain how to navigate their own customer service site 1.3. Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services 1.4. Explain how to adapt their own communication style to meet customers’ ability to use online systems
2. Be able to establish the customer service support needed by customers	2.1. Identify customers’ familiarity with the site 2.2. Identify the difficulties faced by customers when navigating websites 2.3. Identify the support for customers that will meet their needs
3. Be able to support online customer service in real-time	3.1. Step through screen sequences while the customer operates the system 3.2. Communicate with customers in terms they can understand 3.3. Inform customers of what is happening and why certain steps are required 3.4. Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Unit 20: Support customers using self-service equipment

Unit number: H/506/2977

Credit: 3

GLH: 18

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to support customers using self-service equipment	1.1. Explain how the self-service equipment works 1.2. Describe problems that are commonly encountered by customers when using self-service equipment 1.3. Explain demonstration techniques to use when supporting customers using self-service equipment 1.4. Explain organisational procedures for the use of equipment and fault reporting
2. Be able to identify the help needed by customers using self-service equipment	2.1. Identify signs that show when a customer is having difficulty with the self-service equipment 2.2. Identify a style and level of intervention that meets customers' needs
3. Be able to help customers to use self-service equipment	3.1. Maintain a professional, polite and approachable manner while monitoring customers' use of equipment 3.2. Use staff override functions to enable self-service equipment to be used by customers 3.3. Explain to customers how to use the equipment and complete the transaction 3.4. Report equipment-related errors and issues to the right person

Unit 21: Use social media to deliver customer service

Unit number: J/506/2163

Credit: 3

GLH: 18

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand social media in a business environment	1.1. Explain how different social media platforms can be used for customer service 1.2. Describe different audience groups for a range of social media platforms 1.3. Explain the importance of monitoring customer posts in social media networks 1.4. Explain organisational policy and guidelines for the use of social media for customer service purposes 1.5. Explain the etiquette of communication within different social media platforms 1.6. Explain the importance of security settings and how they are used on different social media platforms 1.7. Identify the information that can be shared when colleagues are involved in exchanges using social media
2. Be able to deal with customers using social media	2.1. Monitor social media to identify customer questions, requests and comments 2.2. Make responses that are appropriate to posts made by customers on social media networks 2.3. Take action to ensure that customers are satisfied before closing dialogue 2.4. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

Unit 22: Provide post-transaction customer service

Unit number: K/506/2978

Credit: 5

GLH: 22

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand post-transaction customer service	1.1. Explain organisational policies and procedures for post-transaction customer service 1.2. Explain the purposes and range of post-transaction activities 1.3. Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service 1.4. Explain how legislation and regulation affect customers' rights 1.5. Explain the advantages and disadvantages of post-transaction customer service programmes
2. Be able to provide post-transaction customer service	2.1. Implement a programme of planned post-transaction interventions in line with organisational guidelines 2.2. Use unplanned opportunities post-transaction to provide customer service 2.3. Identify reasons for contacting customers post-transaction 2.4. Confirm customers' levels of satisfaction post-transaction 2.5. Make recommendations to decision makers to enhance customer satisfaction 2.6. Present a professional and helpful image

Unit 23: Resolve customers' complaints

Unit number: R/506/2151

Credit: 4

GLH: 22

Level: 3

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Understand the monitoring and resolution of customers' complaints</p>	<p>1.1. Assess the suitability of a range of monitoring techniques for customers' complaints</p> <p>1.2. Explain how to identify those complaints that should prompt a review of the service offer and service delivery</p> <p>1.3. Explain negotiating techniques used to resolve customers' complaints</p> <p>1.4. Explain conflict management techniques used in dealing with upset customers</p> <p>1.5. Explain organisational procedures for dealing with customer complaints</p> <p>1.6. Explain when to escalate customers' complaints</p> <p>1.7. Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint</p> <p>1.8. Explain the advantages and limitations of offering compensation or replacement products and/or services</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>2. Be able to deal with customers' complaints</p>	<p>2.1. Confirm the nature, cause and implications of customers' complaints</p> <p>2.2. Take personal responsibility for dealing with complaints</p> <p>2.3. Communicate in a way that recognises customers' problems and understands their points of view</p> <p>2.4. Explain the advantages and limitations of different complaint response options to customers</p> <p>2.5. Explain the advantages and limitations of different complaint response options to the organisation</p> <p>2.6. Keep customers informed of progress</p> <p>2.7. Agree solutions with customers that address the complaint and which are within the limits of their own authority</p> <p>2.8. Record the outcome of the handling of complaints for future reference</p> <p>2.9. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints</p>

Unit 24: Gather, analyse and interpret customer feedback

Unit number: D/506/2170

Credit: 5

GLH: 24

Level: 3

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to gather, analyse and interpret customer feedback	1.1. Describe methods of collecting data for customer research 1.2. Explain random sampling techniques used to collect data 1.3. Explain how to evaluate bias in non-random samples 1.4. Explain the principles of questionnaire design 1.5. Assess the suitability of a range of techniques to analyse customer feedback 1.6. Explain techniques used to monitor the quality of data collected 1.7. Explain the use of software to record and analyse customer feedback 1.8. Explain the validation issues associated with customer feedback 1.9. Explain the importance of anonymising comments from customers who do not wish to be identified
2. Be able to plan the collection of customer feedback on customer service issues	2.1. Identify the objectives of collecting customer feedback 2.2. Justify the reasons for selecting different data collection methods 2.3. Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
3. Be able to gather customer feedback	3.1. Collect customer feedback using the sampling frame identified in a customer service plan 3.2. Record data in a way that makes analysis straightforward 3.3. Verify that all data is handled in line with legal, organisational and ethical policies and procedures
4. Be able to analyse and interpret customer feedback to recommend improvements	4.1. Use data analysis methods to identify patterns and trends in customer feedback 4.2. Use the findings of a data analysis to identify areas for improvement to customer service 4.3. Present the findings of an analysis in the agreed format 4.4. Recommend improvements in response to the findings of an analysis

Unit 25: Health and Safety Procedures in the Workplace

Unit number: T/505/4673

Credit: 2

GLH: 16

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>1. Know health and safety procedures in the workplace.</p>	<p>1.1. Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees</p> <p>1.2. Describe two health and safety laws affecting the workplace.</p> <p>1.3. Define the importance of following health and safety procedures in the workplace.</p> <p>1.4. Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.</p>
<p>2. Be able to carry out tasks with regard to health and safety in the workplace.</p>	<p>2.1. Carry out a risk assessment of a specified workplace activity.</p> <p>2.2. Use equipment or tools safely in the workplace.</p> <p>2.3. Describe how to prevent accidents in the workplace.</p> <p>2.4. Assess how own health and safety practices could be improved.</p>

Unit 26: Manage diary systems

Unit number: L/506/1807

Credit: 2

GLH: 12

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the management of diary systems	1.1. Explain the importance of keeping diary systems up to date 1.2. Describe the basis on which bookings and changes are prioritised 1.3. Explain any constraints relating to making bookings for people or facilities 1.4. Describe the types of problems that can occur when managing diaries
2. Be able to manage diary systems	2.1. Obtain the information needed to make diary entries 2.2. Make accurate and timely diary entries 2.3. Respond to changes in a way that balances and meets the needs of those involved 2.4. Communicate up-to-date information to everyone involved 2.5. Keep diaries up-to-date 2.6. Maintain the requirements of confidentiality

Unit 27: Provide reception services

Unit number: H/506/1814

Credit: 3

GLH: 15

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand reception services	1.1. Explain the receptionist’s role in representing an organisation 1.2. Explain an organisation’s structure and lines of communication 1.3. Describe an organisation’s standards of presentation 1.4. Explain the health, safety and security implications of visitors to a building 1.5. Explain how to deal with challenging people
2. Be able to provide a reception service	2.1. Welcome visitors in accordance with organisational standards 2.2. Direct visitors to the person they are visiting in accordance with organisational standards 2.3. Record visitors’ arrivals and departures in accordance with organisational procedures 2.4. Provide advice and accurate information within organisational guidelines on confidentiality 2.5. Keep the reception area tidy and materials up-to-date 2.6. Answer and deal with telephone calls within organisational standards 2.7. Adhere to organisational procedures on entry, security, health and safety

Unit 28: Contribute to the organisation of an event

Unit number: L/506/1869

Credit: 3

GLH: 23

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand event organisation	1.1. Explain the roles, responsibilities and accountabilities of individuals involved in the event 1.2. Explain the purpose and features of different types of events 1.3. Describe the type of resources needed for different types of events 1.4. Describe the different needs attendees may have and how to meet these 1.5. Explain the requirements of health, safety and security when organising events 1.6. Describe the types of problems that may occur during events and how to deal with them
2. Be able to carry out pre-event actions	2.1. Identify venue requirements for an event 2.2. Obtain resources within the agreed timescales 2.3. Distribute pre-event documentation to delegates in accordance with the event plan 2.4. Co-ordinate attendee responses within the agreed timescale 2.5. Identify any special requirements of event attendees
3. Be able to set up an event	3.1. Set up layout and resources in accordance with the event plan 3.2. Confirm that all identified resources are in place and meet requirements 3.3. Behave in a way that maintains organisational values and standards

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
4. Be able to carry out post-event actions	4.1. Ensure the venue is restored to the required conditions in accordance with the terms of the contract 4.2. Carry out follow-up actions in accordance with the event plan and agreements made at the event

Unit 29: Buddy a colleague to develop their skills

Unit number: M/506/1895

Credit: 3

GLH: 19

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to buddy a colleague	1.1. Describe what is expected of a buddy 1.2. Explain techniques to give positive feedback and constructive criticism 1.3. Explain techniques to establish rapport with a buddy
2. Be able to plan to buddy a colleague	2.1. Agree which aspects of a colleague’s work may benefit from buddying 2.2. Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3. Agree a schedule of meetings that minimise disruption to business 2.4. Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3. Be able to support a buddy colleague carrying out work activities	3.1. Remain unobtrusive while a buddy colleague carries out their work activities 3.2. Provide examples of how to carry out tasks correctly 3.3. Identify instances of good practice and areas for improvement through observation 3.4. Praise a buddy colleague on well completed tasks 3.5. Give constructive feedback on ways in which a buddy could improve performance 3.6. Offer a buddy hints and tips based on personal experience

Unit 30: Employee rights and responsibilities

Unit number: L/506/1905

Credit: 2

GLH: 16

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the role of organisations and industries	1.1. Explain the role of their own occupation within an organisation and industry 1.2. Describe career pathways within their organisation and industry 1.3. Identify sources of information and advice on an industry, occupation, training and career pathway 1.4. Describe an organisation’s principles of conduct and codes of practice 1.5. Explain issues of public concern that affect an organisation and industry 1.6. Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers’ expectations and employees’ rights and obligations	2.1. Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2. Describe an employer’s expectations for employees’ standards of personal presentation, punctuality and behaviour 2.3. Describe the procedures and documentation that protect relationships with employees 2.4. Identify sources of information and advice on employment rights and responsibilities

Unit 31: Develop working relationships with colleagues

Unit number: R/506/1789

Credit: 3

GLH: 19

Level: 2

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the principles of effective team working	1.1. Outline the benefits of effective team working 1.2. Describe how to give feedback constructively 1.3. Explain conflict management techniques that may be used to resolve team conflicts 1.4. Explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5. Explain the importance of warning colleagues of problems and changes that may affect them
2. Be able to maintain effective working relationships with colleagues	2.1. Recognise the contribution of colleagues to the achievement of team objectives 2.2. Treat colleagues with respect, fairness and courtesy 2.3. Fulfil agreements made with colleagues 2.4. Provide support and constructive feedback to colleagues
3. Be able to collaborate with colleagues to resolve problems	3.1. Take others' viewpoints into account when making decisions 3.2. Take ownership of problems within own level of authority 3.3. Take action to minimise disruption to business activities within their own level of authority 3.4. Resolve problems within their own level of authority and agreed contribution

Unit 32: Principles of equality and diversity in the workplace

Unit number: J/506/1806

Credit: 2

GLH: 10

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the implications of equality legislation	1.1. Define the concept 'equality and diversity' 1.2. Describe the legal requirements for equality of opportunity 1.3. Describe the role and powers of organisations responsible for equality 1.4. Explain the benefits of equal opportunities and diversity 1.5. Explain the potential consequences for an organisation of failing to comply with equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1. Explain how organisational policies on equality and diversity translate into day to day activity in the workplace 2.2. Describe their own responsibilities for equality and diversity in the workplace 2.3. Describe behaviours that support equality, diversity and inclusion in the workplace

Unit 33: Processing sales orders

Unit number: M/502/8587

Credit: 2

GLH: 17

Level: 2

All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to process and follow up sales orders	1.1. Explain the importance of sales order processing 1.2. Describe organisational processes for ordering products and/or services 1.3. Describe different sources of information used to check customer credit 1.4. Describe the different payment methods accepted by sales orientated organisations 1.5. Explain the role of the despatch function 1.6. Describe service standards relating to sales order completion 1.7. Explain the importance of storing information securely

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
2. Be able to process sales orders	2.1. Identify customer sales order requirements 2.2. Check that the credit status of the customer meets organisational standards 2.3. Confirm the availability of products and/or services to the customer 2.4. Ensure that information given to the customer about delivery, timing and price is accurate 2.5. Ensure that the sale is authorised following the organisation's procedures 2.6. Finalise the transaction in accordance with organisational procedures 2.7. Ensure that the customer is aware of the terms and conditions of sale 2.8. Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders 2.9. Identify who to go to when in need of support with sales order processing problems
3. Be able to follow up sales order processing	3.1. Keep the customer informed of the sales order progress and any problems with the sale order 3.2. Advise the customer of current discounts and special offers 3.3. Check all information is stored securely

Unit 34: Meeting customers’ after sales needs

Unit number: R/502/8601

Credit: 3

GLH: 14

Level: 2

All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to investigate customer after sales needs	1.1. Establish the nature of customers’ after sales needs 1.2. Communicate with customers in a way that conforms with quality and customer service standards at all times
2. Be able to handle customers’ after sales needs	2.1. Deal with customers’ after sales needs following organisational customer service standards and procedures 2.2. Balance customers’ needs with those of the organisation 2.3. Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority 2.4. Fulfil commitments made to customers in accordance with quality and customer service standards 2.5. Record commitments made to customers
3. Be able to review the after sales process	3.1. Obtain customers’ comments on service reliability from customers 3.2. Analyse and report the findings to the relevant person in the organisation 3.3. Make recommendations for improvements to after sales service provision in the light of customer feedback

Unit 35: Handling objections and closing sales

Unit number: M/502/8606

Credit: 3

GLH: 22

Level: 2

All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand how to handle sales objections	1.1. Explain the difference between standard and non-standard sales objections 1.2. Explain how to clarify objections and identify potential sales opportunities from them 1.3. Describe how to use questioning techniques to explore and resolve customer issues 1.4. Explain how to empathise with and reassure the customer 1.5. Explain the difference between hypothetical and real objections 1.6. Explain how knowledge of products and services can be used to answer objections 1.7. Explain how competitor activity may affect the potential sale 1.8. Describe how industry/sector pricing structures may have an impact on sales objections 1.9. Explain the scope of authority and responsibility when dealing with objections 1.10. State who to go to when in need of support to overcome objections
2. Understand how to close the sale	2.1. Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale 2.2. Explain how to perform a trial close 2.3. Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale 2.4. Explain potential barriers to closing the sale

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	2.5. Explain a range of ways to close the sale
3. Be able to handle objections	3.1. Clarify the nature and extent of objections 3.2. Explain to the customer the concessions available within the scope of authority 3.3. Follow organisational procedures for dealing with objections 3.4. Promote the benefits of products and/or services to overcome objections 3.5. Use testimonials to overcome objections 3.6. Refer to those in authority when dealing with objections outside the scope of own authority
4. Be able to close the sale	4.1. Perform a trial close and ask for the order when objections have been met 4.2. Make use of add-on, up-selling or cross-selling opportunities 4.3. Follow organisational procedures for accepting confirmation of an order

Unit 36: Deal with incidents through a contact centre

Unit number: K/503/0421

Credit: 7

GLH: 40

Level: 2

All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Contact Centre Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to deal with incidents through a contact centre	1.1. Respond to incoming calls in a calm and professional manner 1.2. Maintain control of the conversation 1.3. Record the contact and information in an incident log in accordance with organisational procedures 1.4. Assess and prioritise reported incidents in accordance with organisational procedures 1.5. Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures 1.6. Provide information, advice and support in response to requests in accordance with organisational procedures 1.7. Escalate incident responses in accordance with organisational procedures
2. Be able to use contact centre communications systems to deploy incident management resources	2.1. Communicate with external organisations in accordance with organisational procedures 2.2. Use the most efficient means (voice or data options) to communicate with those dealing with the incident 2.3. Use agreed conventions of wording, style and approach appropriate for different communication media

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
<p>3. Understand how to deal with incidents in a contact centre</p>	<p>3.1. Describe the incident management services offered by the contact centre</p> <p>3.2. Describe the impact of regulation or legislation on incident management</p> <p>3.3. Describe the purpose and use of decision trees</p> <p>3.4. Describe how to determine the appropriate allocation of resources to incidents</p> <p>3.5. Describe the boundaries of a contact incident that justify actions being escalated to different levels of response</p> <p>3.6. Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident</p> <p>3.7. Describe standard wording and codes used by the organisation when dealing with incident management</p> <p>3.8. Describe the type and extent of resources available for deployment in incident management</p>

Unit 37: Carry out direct sales activities in a contact centre

Unit number: L/503/0394

Credit: 5

GLH: 15

Level: 2

All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Contact Centre Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to gather information needed for direct sales activities in a contact centre	1.1. Assemble information about products and/or services that support direct sales 1.2. Obtain from customers sufficient information to support direct sales activities 1.3. Create sales opportunities by making links between information provided by customers and products and/or services 1.4. Find potential new customers for products and/or services
2. Be able to carry out direct sales to customers through a contact centre	2.1. Establish customers' identity in accordance with organisational procedures 2.2. Check customers' wishes and needs 2.3. Identify possible matches with products and/or services from information provided by customers 2.4. Explain to customers the features and benefits of products and/or services for sale 2.5. Adapt their sales approach and style to meet customer preferences 2.6. Maximise opportunities for cross-selling and up-selling 2.7. Complete the authorisation or payment in accordance with organisational procedures

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
3. Be able to keep direct sales records within a contact centre	3.1. Identify the information about customers, products and/or services that should be recorded during the sales process 3.2. Record customer, product and/or service information in accordance with organisational procedures
4. Be able to comply with regulations and legislation during direct sales in a contact centre	4.1. Identify the regulatory requirements that have an impact on direct sales activities through a contact centre 4.2. Ensure compliance with regulations during direct selling through a contact centre
5. Understand how to conduct sales activities in a contact centre	5.1. Describe the features and benefits of the products and/or services offered or supported by the contact centre 5.2. Describe the organisational policies and procedures for direct sales through a contact centre 5.3. Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities 5.4. Describe the common objections and questions raised by customers during direct selling 5.5. Explain how to identify cross-selling and up-selling opportunities 5.6. Describe different methods of researching potential new customers 5.7. Explain how to retrieve information from organisational sales records 5.8. Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling

Unit 38: Negotiate in a business environment

Unit number: H/506/1912

Credit: 4

GLH: 18

Level: 3

All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand the principles underpinning negotiation	1.1. Describe the requirements of a negotiation strategy 1.2. Explain the use of different negotiation techniques 1.3. Explain how research on the other party can be used in negotiations 1.4. Explain how cultural differences might affect negotiations
2. Be able to prepare for business negotiations	2.1. Identify the purpose, scope and objectives of the negotiation 2.2. Explain the scope of their own authority for negotiating 2.3. Prepare a negotiating strategy 2.4. Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5. Assess the likely objectives and negotiation stances of the other party 2.6. Research the strengths and weaknesses of the other party
3. Be able to carry out business negotiations	3.1. Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2. Adapt the conduct of the negotiation in accordance with changing circumstances 3.3. Maintain accurate records of negotiations, outcomes and agreements made 3.4. Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Unit 39: Bespoke Software

Unit number: F/502/4396

Credit: 3

GLH: 20

Level: 2

See IT User Assessment Strategy available from www.e-skills.com.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Input and combine information using bespoke applications	1.1. Input relevant information accurately so that it is ready for processing 1.2. Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3. Respond appropriately to data entry error messages
2. Use appropriate structures to organise and retrieve information efficiently	2.1. Describe what functions to apply to structure and layout information effectively 2.2. Select and use appropriate structures and/or layouts to organise information 2.3. Apply local and/or legal guidelines and conventions for the storage and use of data where available
3. Use the functions of the software effectively to process and present information	3.1. Select and use appropriate tools and techniques to edit, process and format information 3.2. Check information meets needs, using IT tools and making corrections as necessary 3.3. Select and use appropriate methods to present information