



# Qualification Specification

## Highfield Level 2 Diploma for Customer Service Practitioners (RQF)

Qualification Number: 603/1344/4

**This Qualification will expire 31/8/2019**

Version 1.1 June 2019

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## Highfield Level 2 Diploma for Customer Service Practitioners (RQF)

### Introduction

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

### Qualification regulation and support

The Highfield Level 2 Diploma for Customer Service Practitioners (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. It is also suitable for delivery in Wales and is regulated by Qualifications Wales.

### Key facts

<b>Qualification number:</b>	603/1344/4
<b>Learning aim reference:</b>	60313444
<b>Credit value:</b>	37
<b>Assessment method:</b>	Portfolio of Evidence
<b>Guided learning hours (GLH):</b>	225
<b>Total qualification time (TQT):</b>	370

### Qualification overview and objective

This qualification has been developed to support learners completing the Customer Service Practitioner Apprenticeship Standard and can be used to assess their readiness for end-point assessment. It covers the knowledge and skills of the standard.

It is designed for those learners wishing to gain a nationally recognised qualification in customer service.

The objective of the qualification is to support a role in the workplace in customer service, giving learners the opportunity to learn and evidence their knowledge and skills either as part of an apprenticeship or as a stand-alone qualification.

The qualification provides learners with the knowledge, understanding and skills in customer service such as:

- deliver effective customer service
- role and responsibilities within a customer service environment
- dealing with conflict and challenge within a customer service environment

### Entry requirements

To register on to this qualification, learners are required to meet the following entry requirements:

- be 16 years of age or above
- have a basic level of literacy and numeracy

## Geographical coverage

This qualification is suitable for delivery in England and Wales

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## Centre requirements

There are no specific requirements for the centre as long as each learner's workplace is suitably equipped for the chosen units to be delivered and assessed.

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## Guidance on delivery

The total qualification time for this qualification is 370 hours and of this 225 are recommended as guided learning hours.

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

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## Guidance on assessment

This qualification is assessed through the completion of a portfolio of evidence, which must be internally quality assured by the centre. A portfolio of evidence gives centres flexibility in how individual assessment criteria are assessed. Additional guidance is included at the bottom of each unit suggesting how assessment criteria can be assessed.

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

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

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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 a 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 documentation.

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## Assessor requirements

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

- have current, relevant occupational expertise and knowledge that has been gained through 'hands-on' experience in the industry and could include qualifications such as:
    - Highfield Level 3 Diploma in Customer Service
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- Highfield Level 3 Certificate in Customer Service
  - Highfield Level 3 NVQ Certificate in Customer Service
- hold or be working towards a recognised assessing qualification, which could include any of the following:
  - Level 3 Award in Assessing Competence in the Work Environment
  - Level 3 Certificate in Assessing Vocational Achievement
  - A1 Assess Learner Performance Using a Range of Methods
  - D32 Assess Learner Performance and D33 Assess Learner Using Different Sources of Evidence
- maintain appropriate continued professional development for the subject area

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### Internal quality assurance (IQA) requirements

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

- have current, relevant occupational expertise and knowledge that has been gained through ‘hands-on’ experience in the industry and could include qualifications such as:
  - Highfield Level 3 Diploma in Customer Service
  - Highfield Level 3 Certificate in Customer Service
  - Highfield Level 3 NVQ Certificate in Customer Service
- hold or be working towards a recognised internal quality assurance qualification, which could include any of the following:
  - Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice
  - Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
  - D34 or V1 verifier awards
- maintain appropriate continued professional development for the subject area

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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
- a 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.

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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:

- Customer Service Practitioner Apprenticeship
- Highfield Level 2 Diploma in Customer Service
- Highfield Level 3 Diploma in Customer Service

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### Useful websites

- <https://www.gov.uk/government/collections/apprenticeship-standards>
  - <https://www.instituteofcustomerservice.com/>
  - [www.thecustomerserviceblog.uk](http://www.thecustomerserviceblog.uk)
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## Appendix 1: Qualification structure

To complete the Highfield **Level 2 Diploma for Customer Service Practitioners (RQF)**, learners must complete the following:

- **all units** contained within the mandatory group
- **1 unit** from optional group A

### Mandatory group

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

Unit reference	Unit title	Level	GLH	Credit
D/615/6236	Understand the needs and expectations of customers	2	30	4
H/615/6237	Deliver effective customer service	2	50	8
K/615/6238	Understanding the organisation	2	23	4
M/615/6239	Meeting regulations and legislation within a customer service environment	2	34	6
H/615/6240	Role and responsibilities within a customer service environment	2	33	6
K/615/6241	Dealing with conflict and challenge within a customer service environment	2	27	4

### Optional group A

Learners must achieve **1 unit** from this group

Unit reference	Unit title	Level	GLH	Credit
M/615/6242	Communication skills in customer facing roles	2	28	5
T/615/6243	Communication skills in non-customer facing roles	2	28	5

## Appendix 2: Qualification content

### Unit 1: Understand the needs and expectations of customers

Unit number: D/615/6236

Credit: 4

GLH: 30

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand who customers are	<p>1.1 Explain the importance of building good customer relations to the organisation.</p> <p>1.2 Explain the difference between internal and external customers.</p> <p>1.3 Describe different types of internal and external customers.</p> <p>1.4 Give examples of internal and external customers in your organisation.</p>
2. Understand how to manage customer needs and expectations	<p>2.1 Describe specific needs and priorities of different customers, including those protected under current Equality law.</p> <p>2.2 Explain when and how to adapt their service approach to meet the needs and expectations of customers.</p> <p>2.3 Explain the importance of managing customers' expectations.</p>
3. Understand how to create a customer focused experience	<p>3.1 Explain how an understanding of the facts can be used to create a customer focused experience.</p> <p>3.2 Explain how to build trust with customers and the importance of doing so.</p> <p>3.3 Explain how to respond to customer needs and requirements positively.</p>

### Amplification / Indicative content



1.1 - Candidates should show understanding of how good customer relations lead to customer satisfaction and customer loyalty, which in turn impact upon organisational performance. Candidates should also demonstrate understanding of the consequences of poor customer relations.

1.3 - Candidates should show understanding of how categorising customers into groups can be helpful when identifying and meeting their needs, for example:

- customers described according to their gender, age, cultural background, etc.;
- challenging or dissatisfied customers;
- loyal customers, impulse buyers and discount shoppers .

2.1 - Candidates should:

- show understanding of the difference between a need and a priority, in the context of customer service;
- show understanding of current Equality law; and
- describe the specific needs and priorities of at least three different types of customer, including one who has a protected characteristic under the Equality Act 2010.

2.2 - Candidates should show understanding of the difference between a need and an expectation. Candidates should then explain when and how to adapt their service approach to meet the needs and expectations of at least three different types of customer.

#### **Additional unit guidance**

LO1-3 assessment criteria are assessed via knowledge based assessment method, such as Q&A, professional discussion etc.

**Unit 2: Deliver effective customer service**

Unit number: H/615/6237

Credit: 8

GLH: 50

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Create a customer focused experience	1.1 Engage with customers in a positive manner. 1.2 Work with customers to build a rapport. 1.3 Recognise and respond to individual needs to provide a personalised customer service experience. 1.4 Recognise and, where possible, meet the needs and expectations of customers. 1.5 Adapt interpersonal skills when working with different customers. 1.6 Apply knowledge of the Equality Act when providing customer service.
2. Establish clearly what each customer requires and manage their expectations	2.1 Establish the needs and expectations of customers and work towards meeting them, explaining when necessary when they cannot be met. 2.2 Give help and information that meets customers' expectations.
3. Be able to provide clear explanations and offer options	3.1 Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation. 3.2 Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs. 3.3 Provide clear explanations in order to help customers make choices that are mutually beneficial to both the customer and the organisation
4. Take ownership and responsibility from the first contact	4.1 Demonstrate ability to confidently approach customers, remaining positive

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	<p>and professional when circumstances are challenging.</p> <p>4.2 Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.</p> <p>4.3 Take ownership from beginning to end of customer journey, building and maintaining a relationship with the customer.</p> <p>4.4 Make contact as promised, referring to others as necessary with all required detail</p> <p>4.5 Follow-up with the customer to ensure conclusion and satisfaction.</p>
5. Work with others in the interest of helping customers efficiently	<p>5.1 Show willingness to work with others and share ideas where appropriate.</p> <p>5.2 Work with others in a positive and productive manner to ensure efficient customer service delivery.</p> <p>5.3 Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.</p> <p>5.4 Share personal learning and information with others to support good customer service practice.</p> <p>5.5 Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.</p>
6. Act in accordance with the service culture of your organisation	<p>6.1 Behave in a way that upholds the core values and service culture of the organisation.</p> <p>6.2 Apply the organisation's policies and procedures when delivering customer service.</p>

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	6.3 Apply knowledge of the organisational products and/or services to deliver customer service.
7. Use systems, equipment and technology to meet the needs of customers	7.1 Use different systems, equipment and/or technology available in the organisation to meet customer needs effectively.

### Amplification / Indicative content

1.1 Candidates should demonstrate effective interpersonal skills that achieve positive customer engagement, such as:

- open and closed questioning skills relevant to the situation;
- active listening skills when communicating; and
- appropriate body language when interacting with customers.

1.5 / 1.6 Candidates should be assessed on delivering customer service to three different types of customer, one of which should have a defined protected characteristic

### Additional unit guidance

LO1-7 assessment criteria are assessed through practical performance. Simulation is not permitted for these LOs and evidence of real working activity should be sought.

**Unit 3: Understanding the organisation**

Unit number: K/615/6238

Credit: 4

GLH: 23

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Know the purpose of the business	1.1 State the aims of the organisation in relation to its sector. 1.2 State what is meant by the organisation's 'brand promise'.
2. Understand the products or services that are available from your organisation	2.1 Describe the features and benefits of products/services the organisation offers. 2.2 Describe how to maintain their knowledge of the organisation's products and/or services. 2.3 Explain why it is important to update their knowledge on the organisation's products/services.
3. Know your organisation's core values and how they link to the service culture	3.1 Identify the organisation's core values. 3.2 Explain how the organisation's core values relate to its service culture.
4. Know internal policies and procedures relevant to their role and organisation	4.1 State the purpose of different internal organisational policies and procedures that affect their customer service role. 4.2 Describe the type of guidelines contained in a digital media policy that affect the use of social and digital media in the work environment.
5. Understand types of measurement and evaluation tools available to monitor customer service levels	5.1 Describe the measures and evaluation tools used in the organisation to monitor customer service levels.

### **Amplification / Indicative content**

1.1 - Candidates should show knowledge of the different sectors - public, private and voluntary - and state the aims of their own organisation in relation to the relevant sector.

2.1 - Candidates should describe both the features and the benefits of products/services that their organisation offers:

- features are what the product/service does; and
- benefits are how the features meet the needs of customers.

### **Additional unit guidance**

LO1-5 assessment criteria are assessed via knowledge based assessment method, such as Q&A, professional discussion etc.

#### Unit 4: Meeting regulations and legislation within a customer service environment

Unit number: M/615/6239

Credit: 6

GLH: 34

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Know the legislation and regulatory requirements that affect their organisation	<p>1.1 Describe legislation and regulatory requirements relevant to own role and organisation.</p> <p>1.2 Explain how the relevant legislation and regulations affect the organisation's customer service provision.</p> <p>1.3 Explain how a code of practice or ethical standards affects customer service.</p>
2. Know how to apply legislation and regulatory requirements when delivering service to customers	<p>2.1 State their responsibilities for keeping information confidential in the organisation.</p> <p>2.2 State the responsibilities of employers and employees under the Health and Safety at Work Act.</p> <p>2.3 Explain how to apply legislation and regulatory requirements relevant to the learner's organisation or role when delivering service to customers.</p> <p>2.4 State the potential impact on the organisation if it fails to adhere to each of the relevant legislation and regulations.</p>

#### Amplification / Indicative content

- 1.1 Candidates must be able to give information about the most common legislation and regulations that affect them directly in their work roles. Candidates must show how they are they expected to work in line with the:
- Consumer Rights Act 2015
  - Data Protection
  - Equality and Diversity
  - Consumer Contracts Regulations

- Consumer Credit Act
- Health and Safety

These may vary depending on the requirements of the organisation which may also have to adhere to specific procedures e.g. banking, solicitors, doctors' surgeries, hospitals, dentists, letting Agents, e-commerce etc.

- 1.2 - Candidates are expected to show a basic understanding of how each of the above legislation and regulations affect the organisation's customer service provision.
- 2.2 - Candidates must ensure that both employer and employee responsibilities are covered.

#### **Additional unit guidance**

LO1-2 assessment criteria are assessed via knowledge based assessment method, such as Q&A, professional discussion etc.



**Unit 5: Role and responsibilities within a customer service environment**

Unit number: H/615/6240

Credit: 6

GLH: 33

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Understand their role and responsibility within the organisation	1.1 Describe your role and responsibilities within the organisation. 1.2 Explain the importance of good customer service to the customer and in turn the organisation. 1.3 Explain how the actions taken in the context of their job role and responsibilities impact on others in the organisation.
2. Be able to organise yourself, prioritise your work and meet deadlines / agreed targets	2.1 Identify their agreed targets and goals. 2.2 Describe how to achieve their agreed targets and goals. 2.3 Prioritise and plan the completion of tasks according to agreed deadlines. 2.4 Use appropriate tools and techniques to monitor the progress of tasks. 2.5 Complete work adhering to set targets and deadlines.
3. Be able to keep service knowledge and skills up-to-date	3.1 Conduct a self-assessment to identify own strengths and weaknesses in relation to the job role. 3.2 Obtain constructive feedback about their customer service skills and knowledge from others. 3.3 Use feedback from others to develop their customer service skills and knowledge. 3.4 Produce a personal development plan to support the achievement of their agreed learning and development goals.

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
	3.5 Review the effectiveness of their personal development plan and update it accordingly.

#### Additional unit guidance

LO1 assessment criteria are assessed via knowledge based assessment method, such as Q&A, professional discussion etc.

LO2-3 assessment criteria are assessed through practical performance. Simulation is not permitted for these LOs and evidence of real working activity should be sought.

**Unit 6: Dealing with conflict and challenge within a customer service environment**

Unit number: K/615/6241

Credit: 4

GLH: 27

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to deal with challenging customer situations effectively.	<p>1.1 Remain calm and patient at all times when dealing with challenging customer situations.</p> <p>1.2 Demonstrate sensitivity to, and interest in, the customers' concerns.</p> <p>1.3 Handle customer objections in a positive and professional manner.</p> <p>1.4 Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations.</p> <p>1.5 Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.</p> <p>1.6 Provide appropriate explanations to customers in situations where a mutual outcome cannot be reached.</p> <p>1.7 Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.</p>
2. Be able to maintain communication during service recovery.	<p>2.1 Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers</p> <p>2.2 Keep customers informed of progress while resolving issues.</p> <p>2.3 Maintain accurate record of customer issues and progress to resolution.</p>

**Additional unit guidance**

LO1-2 assessment criteria are assessed through practical performance. Simulation is not permitted for these LOs and evidence of real working activity should be sought.

**Unit 7: Communication skills in customer facing roles**

Unit number: M/615/6242

Credit: 5

GLH: 28

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to use appropriate (verbal and non-verbal) communication skills	<p>1.1 Demonstrate ability to make initial customer contact using appropriate verbal and non-verbal communication skills.</p> <p>1.2 Adapt tone, behaviour and body language in order to recognise and confirm understanding of needs and expectations.</p> <p>1.3 Recognise when to summarise a communication with a customer.</p> <p>1.4 Use summarising language during customer interaction to confirm understanding.</p> <p>1.5 Use an appropriate 'tone of voice' in all communications, that reflect the organisation's brand.</p> <p>1.6 Demonstrate ability to adapt communication - tone, behaviour and language - for different customers and their interactions.</p> <p>1.7 Use organisational procedures in all communication.</p>
2. Demonstrate professional pride in the job	<p>2.1 Present a professional image in line with the organisation's dress code and code of conduct.</p> <p>2.2 Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.</p>

**Amplification / Indicative content**

Candidates must demonstrate their communication skills both verbally **and** non-verbally by starting the communication in face to face situations with customers. There must be sufficient evidence to show all skills across different types of customers with varying needs.

- **Verbal**
  - Correct tone for the situation which reinforces the message
  - Appropriate language for the situation which can easily be understood by customers
  - Appropriate speed of communication for individual customers
  - Consider the type of communication are they formal or informal
- **Non-verbal**
  - Use eye contact appropriately, to engage with the customers
  - Adopt a respectful posture
- **Summarise**
  - Use appropriate language and knowledge to provide clarity and confirmation to customers that reflects the needs of customers and is easily understood.

#### **Additional unit guidance**

LO1-2 assessment criteria are assessed through practical performance. Simulation is not permitted for these LOs and evidence of real working activity should be sought.

**Unit 8: Communication skills in non customer facing roles**

Unit number: T/615/6243

Credit: 5

GLH: 28

Level: 2

Learning Outcomes	Assessment Criteria
<i>The learner will</i>	<i>The learner can</i>
1. Be able to use appropriate communication skills	<p>1.1 Demonstrate ability to make customer contact and make use of appropriate communication skills.</p> <p>1.2 Adapt tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.</p> <p>1.3 Recognise when to use reinforcement techniques during customer interactions.</p> <p>1.4 Demonstrate ability to use reinforcement techniques during customer interactions.</p> <p>1.5 Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.</p> <p>1.6 Demonstrate ability to adapt communication - tone, behaviour and language - for different customers and their interactions.</p> <p>1.7 Use organisational procedures in all communication.</p>
2. Demonstrate professional pride in the job	2.1 Demonstrate a positive attitude when dealing with customers.

**Amplification / Indicative content**

Candidates must demonstrate their communication skills in non-customer facing situations. There must be sufficient evidence to show all skills across different types of customers with varying needs.

- **Written communication (email, letter, digital)**
  - Correct tone for the situation which reinforces the message
  - Appropriate language for the situation which can easily be understood by customers
  - Appropriate speed of communication for individual customers

Consider the type of communication are they formal or informal

- **Reinforcement skills**

Use appropriate language and knowledge to provide clarity and confirmation to customers that reflects the needs and expectations of customers and is easily understood.

#### **Additional unit guidance**

LO1-2 assessment criteria are assessed through practical performance. Simulation is not permitted for these LOs and evidence of real working activity should be sought.

### Appendix 3: Sample assessment material

The following pages include sample paperwork which can be used for setting and recording actions and tracking progress and can be found in the qualification assessment pack

We *listen* and *respond*


**Assessment/Action Plan Sheet**

Learner Name		Assessor Name				
Target set Learning Outcome / Assessment Criteria	Agreed activity/evidence	Target date	Assessment Method	Target Achieved	Completed (assessor signature)	
Learner Signature		Date		Planned next visit:		
Assessor Signature		Date				



### Assessment Record Sheet

Learner		Assessor	
Date		Location	
Assessment Method			
EV Ref	Details of the type of evidence and assessment criteria covered		
Assessor Signature:			
Learner/Witness Signature:			

Assessment method key:					
<del>Ob</del>	Observation	Sim	Simulation/assignment	O	Other
<del>Pe</del>	Product evidence	<del>Wt</del>	Witness testimony	PD	Professional Discussion
Q	Questioning	R	RPL		

**Evidence Tracking Sheet****Mandatory Units**

Learner Name				
Centre Name				
Mandatory Unit 1: Understand the needs and expectations of customers (D/615/6236)				
Assessment Criteria				
Learning Outcome	Assessment Criteria	Evidence Type	Evidence Reference	Date
1. Understand who customers are	1.1 Explain the importance of building good customer relations to the organisation.			
	1.2 Explain the difference between internal and external customers.			
	1.3 Describe different types of internal and external customers.			
	1.4 Give examples of internal and external customers in your organisation.			
2. Understand how to manage customer needs and expectations	2.1 Describe specific needs and priorities of different customers, including those protected under current Equality law.			
	2.2 Explain when and how to adapt their service approach to meet the needs and expectations of customers.			