

# **Level 2 NVQ Certificate in Customer Service (4430-02)**

**Qualification handbook for centres**  
500/9341/1



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# Level 2 NVQ Certificate in Customer Service (4430-02)



## Qualification handbook for centres

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www.cityandguilds.com  
November 2011  
Version 2.0

Version and date	Change detail	Section
2.0 Nov 2011	Amend GLH Unit 205	Units

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# 1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

<b>Qualification title and level</b>	<b>Level 2 NVQ Certificate in Customer Service</b>
<b>City &amp; Guilds qualification number</b>	4430-02
<b>Qualification accreditation number</b>	500/9341/1
<b>Last registration date</b>	31/07/2014
<b>Last certification date</b>	31/07/2016

The level 2 City & Guilds NVQ Certificate in Customer Service qualification aims to build on or recognise good practice in customer service in any industry or to support their technical expertise in any job role, acknowledging the importance of effective communication and service delivery. Anyone dealing with internal or external customers will benefit from gaining knowledge, understanding and experience of dealing with routine and more difficult customers, confident in their use of language and of the processes designed to make their role effective. Candidates will have the opportunity to improve their own skills and to support others within their team or organisation in the development of excellent customer service.

## Contacting the Sector Skills Body (SSB)

The Council for Administration (CFA)

Tel: 020 7091 9620

Website: **[www.cfa.uk.com](http://www.cfa.uk.com)**

The Institute of Customer Service (ICS)

Tel: 01206 571 716

Fax: 01206 546 688

Website: **[www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)**

## 1.1 Qualification structure

To achieve the **Level 2 NVQ Certificate in Customer Service**, learners must achieve:

### Minimum Credit Value: 28

A minimum of **15 credits** must be at **level 2**.

The learner must achieve **8 credits** from the **Mandatory Units**.

A further **20 credits** must be achieved by completing a **minimum of one unit** from each **Optional Group**.

The diagram below illustrates the unit titles, the credit value of each unit and the title of the qualification which will be awarded to candidates successfully completing the required combination of units and/or credits.

City & Guilds unit number	Mandatory Units - Customer Service Foundations	QCF Level	QCF Credit	GLH
4430-101	Communicate using customer service language (F1)	1	4	30
4430-201	Follow the rules to deliver customer service (F2)	2	4	30
City & Guilds unit number	Optional Units - Impression and Image	QCF Level	QCF Credit	GLH
4430-102	Maintain a positive and customer-friendly attitude (A1)	1	5	33
4430-103	Adapt your behaviour to give a good customer service impression (A2)	1	5	33
4430-202	Communicate effectively with customers (A3)	2	5	33
4430-203	Give customers a positive impression of yourself and your organisation (A4)	2	5	33
4430-204	Promote additional services or products to customers (A5)	2	6	40
4430-205	Process information about customers (A6)	2	5	33
4430-206	Live up to the customer service promise (A7)	2	6	40
4430-207	Make customer service personal (A8)	2	6	40
4430-208	Go the extra mile in customer service (A9)	2	6	40
4430-209	Deal with customers face to face (A10)	2	5	33
4430-210	Deal with incoming telephone calls from customers (A11)	2	5	33
4430-211	Make telephone calls to customers (A12)	2	6	40
4430-303	Deal with customers in writing or electronically (A13)	3	6	40
4430-304	Use customer service as a competitive tool (A14)	3	8	53
4430-305	Organise the promotion of additional services or products to customers (A15)	3	7	47
4430-306	Build a customer service knowledge set (A16)	3	7	47



City & Guilds unit number	Optional Units - Delivery	QCF Level	QCF Credit	GLH
4430-104	Do your job in a customer-friendly way (B1)	1	5	33
4430-212	Deliver reliable customer service (B2)	2	5	33
4430-213	Deliver customer service on your customer's premises (B3)	2	5	33
4430-214	Recognise diversity when delivering customer service (B4)	2	5	33
4430-215	Deal with customers across a language divide (B5)	2	8	53
4430-216	Use questioning techniques when delivering customer service (B6)	2	4	27
4430-217	Deal with customers using bespoke software (B7)	2	5	33
4430-218	Maintain customer service through effective hand over (B8)	2	4	27
4430-307	Deliver customer service using service partnerships (B9)	3	6	40
4430-308	Organise the delivery of reliable customer service (B10)	3	6	40
4430-309	Improve the customer relationship (B11)	3	7	47
City & Guilds unit number	Optional Units - Handling Problems	QCF Level	QCF Credit	GLH
4430-105	Recognise and deal with customer queries, requests and problems (C1)	1	5	33
4430-106	Take details of customer service problems (C2)	1	4	27
4430-219	Resolve customer service problems (C3)	2	6	40
4430-220	Deliver customer service to difficult customers (C4)	2	6	40
4430-310	Monitor and solve customer service problems (C5)	3	6	40
4430-311	Apply risk assessment to customer service (C6)	3	10	67
4430-312	Process customer service complaints (C7)	3	6	40
City & Guilds unit number	Optional Units - Development and Improvement	QCF Level	QCF Credit	GLH
4430-221	Develop customer relationships (D1)	2	6	40
4430-222	Support customer service improvements (D2)	2	5	33
4430-223	Develop personal performance through delivering customer service (D3)	2	6	40
4430-224	Support customers using on-line customer services (D4)	2	5	33
4430-225	Buddy a colleague to develop their customer service skills (D5)	2	5	33
4430-226	Develop your own customer service skills through self-study (D6)	2	6	40
4430-227	Support customers using self-service technology (D7)	2	5	33
4430-313	Work with others to improve customer service (D8)	3	8	53
4430-314	Promote continuous improvement (D9)	3	7	47
4430-315	Develop your own and others' customer service skills (D10)	3	8	53
4430-316	Lead a team to improve customer service (D11)	3	7	47
4430-317	Gather, analyse and interpret customer feedback (D12)	3	10	67
4430-318	Monitor the quality of customer service transactions (D13)	3	7	47

## 1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- Level 3 NVQ Diploma in Customer Service
- Level 2 Certificate in Customer Service
- Customer Service Apprenticeship
- NVQ/SVQs in other work-related areas (for example Administration, Retail, Contact Centres Accounting, IT and other technical sectors)

## 1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Candidate logbook / recording forms	TBA
Centre guide	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
Promotional materials	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
SmartScreen	<a href="http://www.smartscreen.co.uk">www.smartscreen.co.uk</a>

## 2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

### **Centres already offering City & Guilds qualifications in this subject area**

Centres approved to offer the qualification Level 2 NVQ in Customer Service (4543-02) will be given automatic approval for the new Level 2 NVQ Certificate in Customer Service (4430-02). Existing sanctions will apply to the new qualifications.

### **Centres not already offering City & Guilds qualifications in this subject area**

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

### **Centres not yet approved by City & Guilds**

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

## **2.1 Resource requirements**

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

### **Assessors, internal verifiers and external verifiers**

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification. They must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have a thorough knowledge of the Level 2 National Occupational Standards for Customer Service, appropriate to the Level they are working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service NVQ at the Level they are working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and NVQs at the Level they are working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

<b>The Assessor, IV and EV working at Level 2 must have:</b>	<b>This can be evidenced by:</b>	<b>A</b>	<b>IV</b>	<b>EV</b>
A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the ICS		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the ICS Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	joining the ICS	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 2	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

## Employer Direct Model

The ICS feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs and NVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the ICS works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The organisation must:

- liaise with City & Guilds to attain approval to offer this model prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with City & Guilds
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

## Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

## 2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Wherever possible, assessment of the Customer Service National NVQ Units should be carried out in a **real job (either paid or voluntary)**. Where this is not possible this the Institute of Customer Service (ICS) Assessment Strategy does allow for:

### Simulation

Simulation is defined by the Institute of Customer Service (ICS) as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

The use of **simulation** for the following Level 1 NVQ Units only:

- C1 Recognise and deal with customer queries, requests and problems
- C2 Take details of customer service problems

To undertake the assessment of simulated activities for these two units the following guidelines must be met:

- a when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say;
- b the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced;
- c the person taking part in the simulation as a customer must be credible for the situation that is being simulated;
- d any resources or equipment that would normally be in real work should be available and in working order for the simulation;
- e candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work;
- f candidates should complete the required tasks taking account of legislation and regulation that would apply in real work;
- g candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality;
- h whilst the primary purpose of the Simulation is for Assessment, feedback must be given in a way that builds confidence.

### **Realistic Working Environment (RWE)**

The use of a Realistic Working Environment including work experience and work placement is allowed for all units in the Level 1 and Level 2 NVQ.

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

- a assessments must be carried out under realistic business pressures, using real customers and within a defined service offer
- b all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
- c candidates must be expected to achieve a volume of work comparable to normal business practices
- d the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards
- e account must be taken of any legislation or regulations in relation to the type of work that is being carried out
- f candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at the relevant level
- g candidates must show that their productivity reflects those found in the work situation being represented

All other Units must be achieved in a **real working situation (either paid or voluntary)**

### **Age restrictions**

There are no age limits attached to candidates undertaking the qualification unless this is a legal requirement of the process or the environment.

## 3 Course design and delivery

### 3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

### 3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen **[www.smartscreen.co.uk](http://www.smartscreen.co.uk)**
- Useful material is available from **[www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)**

## 4 Assessment

### 4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

### Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

### 4.2 Evidence requirements

- Evidence requirements are included as part of the unit content in this document.

### 4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at:  
**[www.cityandguilds.com/eportfolios](http://www.cityandguilds.com/eportfolios)**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

City & Guilds has developed a logbook including recording documentation specifically for this qualification; *Level 2 NVQ Certificate in Customer Service logbook (TL024430)* which can be ordered from the City & Guilds Walled Garden or from Publications.

### 4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the Institute of Customer Service (ICS) March 2010 and can be located on their website  
**[www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)**



## 5 Units

### Availability of units

The Customer Service units for this qualification follow.

The learning outcomes and assessment criteria are also viewable on the National Database of Accredited Qualifications (NDAQ) **[www.accreditedqualifications.org.uk](http://www.accreditedqualifications.org.uk)**

### Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a Standard Setting Body (SSB)
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- evidence requirements.

## Unit 101

## Communicate using customer service language

**Level:** 1

**Credit value:** 4

**NDAQ number:** F/601/1609

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Identify customers and their characteristics and expectations
- 2 Identify their organisation's services and products
- 3 Know how to communicate using customer service language

### Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit F1 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

### Outcome 1: Identify customers and their characteristics and expectations

#### Assessment Criteria

The learner can:

- 1.1 recognise typical customers and their expectations
- 1.2 discuss customer expectations with colleagues using recognised customer service language
- 1.3 follow procedures through which they and their colleagues deliver effective customer service

### Outcome 2: Identify their organisation's services and products

#### Assessment Criteria

The learner can:

- 2.1 outline their organisation's services and products to customers
- 2.2 greet customers politely and positively
- 2.3 list the information they need to deliver effective customer service and where that information can be found

### Outcome 3: Know how to communicate using customer service language

#### Assessment Criteria

The learner can:

- 3.1 identify the differences between an internal customer and an external customer
- 3.2 list their organisation's services or products
- 3.3 describe the connection between customer expectations and customer satisfaction in customer service
- 3.4 describe why organisation procedures are important to good customer service
- 3.5 explain why teamwork is central to good customer service
- 3.6 identify the service offer of their organisation
- 3.7 identify the part they play in delivering customer service
- 3.8 identify who are their customers
- 3.9 describe the main characteristics of typical customers that they deal with
- 3.10 identify what impresses their customers and what annoys their customers
- 3.11 identify who's who and who does what to deliver customer service in their organisation
- 3.12 describe the kinds of information they need to give good customer service to customers
- 3.13 explain how to find information about their organisation's services or products

- 3.14 list typical customer service problems in their work and who should be told about them
- 3.15 explain how the way they behave affects their customer's service experience

### **Evidence requirements**

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

**Level:** 2

**Credit value:** 4

**NDAQ number:** L/601/1614

### Unit aim

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

### Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Follow their organisation's customer service practices and procedures
- 2 Know how to follow the rules to deliver customer service

### Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit F2 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Follow their organisation's customer service practices and procedures****Assessment Criteria**

The learner can:

- 1.1 follow organisational practices and procedures that relate to their customer service work
- 1.2 recognise the limits of what they are allowed to do when delivering customer service
- 1.3 refer to somebody in authority when they need to
- 1.4 work in a way that protects the security of customers and their property
- 1.5 work in a way that protects the security of information about customers

**Outcome 2: Know how to follow the rules to deliver customer service****Assessment Criteria**

The learner can:

- 2.1 describe organisational practices and procedures that relate to their customer service work
- 2.2 identify the limits of what they are allowed to do when delivering customer service
- 2.3 explain when and how they should refer to somebody in authority about the rules for delivering customer service
- 2.4 explain how they protect the security of customers and their property
- 2.5 explain how they protect the security of information about customers
- 2.6 describe their health and safety responsibilities as they relate to their customer service work
- 2.7 explain their responsibilities to deliver customer service treating customers equally
- 2.8 explain why it is important to respect customer and organisation confidentiality
- 2.9 list the main things they must do and not do in their job under legislation that affects their customer service work
- 2.10 list the main things that they must do and not do in their job under external regulations that affect their customer service work

**Evidence requirements**

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
- 5 You must provide evidence of following the rules to deliver customer service:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down

**Level:** 2

**Credit value:** 5

**NDAQ number:** R/601/1212

### Unit aim

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

### Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:

- 1 Communicate effectively with customers
- 2 Understand how to communicate effectively with customers

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A3 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.



**Outcome 1: Communicate effectively with customers****Assessment Criteria**

The learner can:

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

**Outcome 2: Understand how to communicate effectively with customers****Assessment Criteria**

The learner can:

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

## Evidence requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Level 1 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You need to include evidence that you have communicated effectively with customers:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.
- 6 You need to include evidence that you have communicated effectively with different customers who:
  - a have an easy-going attitude
  - b have a difficult attitude
  - c are easy to understand
  - d are difficult to understand.
- 7 The messages you pass on to colleagues may be verbal, in writing or passed on by any other method you would be expected to use within your job.

## Unit 203

## Give customers a positive impression of yourself and your organisation

**Level:** 2

**Credit value:** 5

**NDAQ number:** L/601/0933

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Establish rapport with customers
- 2 Respond appropriately to customers
- 3 Communicate information to customers
- 4 Understand how to give customers a positive impression of themselves and the organisation

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A4 of the Customer Service NOS.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

### Outcome 1: Establish rapport with customers

#### Assessment Criteria

The learner can:

- 1.1 meet their organisation's standards of appearance and behaviour
- 1.2 greet their customer respectfully and in a friendly manner
- 1.3 communicate with their customer in a way that makes them feel valued and respected
- 1.4 identify and confirm their customer's expectations
- 1.5 treat their customer courteously and helpfully at all times
- 1.6 keep their customer informed and reassured
- 1.7 adapt their behaviour to respond to different customer behaviour

### Outcome 2: Respond appropriately to customers

#### Assessment Criteria

The learner can:

- 2.1 respond promptly to a customer seeking help
- 2.2 choose the most appropriate way to communicate with their customer
- 2.3 check with their customer that they have fully understood their expectations
- 2.4 respond promptly and positively to their customer's questions and comments
- 2.5 allow their customer time to consider their response and give further explanation when appropriate

### Outcome 3: Communicate information to customers

#### Assessment Criteria

The learner can:

- 3.1 quickly find information that will help their customer
- 3.2 give their customer information they need about the services or products offered by their organisation
- 3.3 recognise information that their customer might find complicated and check whether they fully understand
- 3.4 explain clearly to their customers any reasons why their expectations cannot be met

## **Outcome 4: Understand how to give customers a positive impression of themselves and the organisation**

### **Assessment Criteria**

The learner can:

- 4.1 describe their organisation's standards for appearance and behaviour
- 4.2 explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately
- 4.3 identify their organisation's rules and procedures regarding the methods of communication they use
- 4.4 explain how to recognise when a customer is angry or confused
- 4.5 identify their organisation's standards for timeliness in responding to customer questions and requests for information

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence of creating a positive impression with customers:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 6 You must provide evidence that you communicate with customers effectively by:
  - a using appropriate spoken or written language
  - b applying the conventions and rules appropriate to the method of communication you have chosen.

## Unit 204

## Promote additional services or products to customers

**Level:** 2

**Credit value:** 6

**NDAQ number:** D/601/0936

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Identify additional services or products that are available
- 2 Inform customers about additional services or products
- 3 Gain customer commitment to using additional services or products
- 4 Understand how to promote additional services or products to customers

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A5 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Identify additional services or products that are available****Assessment Criteria**

The learner can:

- 1.1 update and develop their knowledge of their organisation's services or products
- 1.2 check with others when they are unsure about new service or product details
- 1.3 identify appropriate services or products that may interest their customer
- 1.4 spot opportunities for offering their customer additional services or products that will improve the customer experience

**Outcome 2: Inform customers about additional services or products****Assessment Criteria**

The learner can:

- 2.1 choose the best time to inform their customer about additional services or products
- 2.2 choose the best method of communication to introduce their customer to additional services or products
- 2.3 give their customer accurate and sufficient information to enable them to make a decision about the additional services or products
- 2.4 give their customer time to ask questions about the additional services or products

**Outcome 3: Gain customer commitment to using additional services or products****Assessment Criteria**

The learner can:

- 3.1 close the conversation if the customer shows no interest
- 3.2 give information to move the situation forward when their customer shows interest
- 3.3 secure customer agreement and check customer understanding of the delivery of the service or product
- 3.4 take action to ensure prompt delivery of the additional services or products to their customer
- 3.5 refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility

## **Outcome 4: Understand how to promote additional services or products to customers**

### **Assessment Criteria**

The learner can:

- 4.1 describe the organisation's procedures and systems for encouraging the use of additional services or products
- 4.2 explain how additional services or products will benefit their customers
- 4.3 explain how their customer's use of additional services or products will benefit their organisation
- 4.4 identify the main factors that influence customers to use their services or products
- 4.5 explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- 4.6 state how to give appropriate, balanced information to customers about services or products

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence that the additional services or products offered include:
  - a use of services or products that are new to your customer
  - b additional use of services or products that your customer has used before.
- 6 Your evidence must show that you:
  - a identify what your customer wants by seeking information directly
  - b identify what your customer wants from spontaneous customer comments.



**Level:** 2

**Credit value:** 5

**NDAQ number:** H/601/1215

### Unit aim

The learner and their organisation need information about their customers and their behaviour to answer customer questions and to respond to customer requests.

Information about customers is also used by the organisation to develop its customer service.

Some customer information is collected from customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case the learner must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions.

The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Collect information about customers
- 2 Select and retrieve information about customers
- 3 Supply information about customers
- 4 Understand how to process customer service information

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A6 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Collect information about customers****Assessment Criteria**

The learner can:

- 1.1 collect and record new information about customers following the organisation's guidelines
- 1.2 update existing information about customers
- 1.3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

**Outcome 2: Select and retrieve information about customers****Assessment Criteria**

The learner can:

- 2.1 respond promptly to authorised requests for information about customers
- 2.2 select and retrieve relevant information for customers or colleagues following the organisation's guidelines

**Outcome 3: Supply information about customers****Assessment Criteria**

The learner can:

- 3.1 supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations
- 3.2 choose the most appropriate way to supply information to their customers or colleagues
- 3.3 confirm that their customers or colleagues have received and understood the customer information

**Outcome 4: Understand how to process customer service information****Assessment Criteria**

The learner can:

- 4.1 describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
- 4.2 identify types of personal information about customers that should and should not be kept on record
- 4.3 explain how to collect information about customers efficiently and effectively
- 4.4 explain how to operate the customer information storage system
- 4.5 explain why processing information about customers correctly makes an important contribution to effective customer service

- 4.6 explain the importance of attention to detail when processing information about customers
- 4.7 describe legal and regulatory restrictions on the storage and use of customer data

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence that you have processed information relating to:
  - a new customers
  - b existing customers.
- 6 Your evidence must show that you have:
  - a checked whether the information you are collecting and retrieving is accurate and up-to-date
  - b selected information that is directly relevant to each of your customers.

**Level:** 2

**Credit value:** 6

**NDAQ number:** M/601/1217

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Understand and explain the customer service promise
- 2 Produce customer satisfaction by delivering the customer service promise
- 3 Know how to live up to the customer service promise

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A7 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Understand and explain the customer service promise****Assessment Criteria**

The learner can:

- 1.1 explain the key features of the service offer, vision and promise their organisation has made
- 1.2 identify the role they can play to ensure that their customer believes that the service offer, vision and promise is being delivered
- 1.3 explain the procedures and regulations their organisation follows to support the service offer, vision and promise
- 1.4 devise and use phrases that reinforce the service offer, vision and promise
- 1.5 identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise
- 1.6 identify moments and actions within the delivery of customer service that are particularly relevant to their customer's experience of the promise being delivered
- 1.7 share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise

**Outcome 2: Produce customer satisfaction by delivering the customer service promise****Assessment Criteria**

The learner can:

- 2.1 ensure that their appearance and behaviour supports the organisation's service offer, vision and promise
- 2.2 observe or listen to the customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise
- 2.3 take actions to deliver customer service in a way that meets their customer's expectations and understanding of the service offer, vision and promise
- 2.4 ensure that what they decide to do is realistic and in line with the service offer and promise
- 2.5 be positive about and supportive of the service offer and promise

**Outcome 3: Know how to live up to the customer service promise****Assessment Criteria**

The learner can:

- 3.1 identify the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's service offer, vision and promise
- 3.2 identify ways in which staff can contribute to communicating the service vision or promise to customers

- 3.3 explain sales, marketing and/or public relations reasons for defining a service offer, vision and promise
- 3.4 explain how words can be used and adapted to reflect a defined service offer, vision and promise
- 3.5 explain how actions can be used and adapted to reflect a defined service offer, vision and promise

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your organisation's service offer, vision and promise may be expressed formally or may be simply an informal description of the way customer service is delivered.
- 5 Your evidence of your organisation's service offer, vision and promise must include examples of:
  - a the way these are communicated to customers
  - b how your job role links with your organisation's offers.
- 6 You must show how you deliver the customer service promise:
  - a through your own efforts
  - b working with others.
- 7 Your evidence must show that you have taken opportunities to reinforce your organisation's message:
  - a through organisation initiatives
  - b by responding to opportunities when dealing with customers.

**Level:** 2

**Credit value:** 6

**NDAQ number:** T/601/1218

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Identify opportunities for making customer service personal
- 2 Treat their customer as an individual
- 3 Know and understand how to make customer service personal

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A8 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Identify opportunities for making customer service personal****Assessment Criteria**

The learner can:

- 1.1 identify which of their organisation's systems or procedures allows them to add a personal touch to the service
- 1.2 observe and listen to their customer carefully for signs that will guide how they personalise the service
- 1.3 let the customer know that they understand and that they are there to help
- 1.4 identify opportunities to help or direct their customer outside of normal routines and procedures
- 1.5 identify customers with particular needs who would especially appreciate personal service
- 1.6 balance the time they take when giving individual attention to one customer with the needs and expectations of other customers
- 1.7 make extra efforts to show how willing and able they are to give a more personal service

**Outcome 2: Treat their customer as an individual****Assessment Criteria**

The learner can:

- 2.1 greet and deal with their customer in a way that respects them as an individual
- 2.2 focus their attention on the customer they are dealing with
- 2.3 always communicate with their customer in a friendly and open way
- 2.4 use their customer's name when it is known and appropriate
- 2.5 follow their organisation's guidelines about giving their customer their own name and contact details
- 2.6 concentrate on building a 'one to one' relationship with their customer by making them feel valued and respected

**Outcome 3: Know and understand how to make customer service personal****Assessment Criteria**

The learner can:

- 3.1 explain how the use of the customer's name makes service more personal
- 3.2 describe personality types and their receptiveness to personalised services
- 3.3 identify types of personal information about customers that should and should not be kept on record
- 3.4 identify features of personal service that are most appreciated by customers with individual needs



- 3.5 describe body language and approaches that promote open communication
- 3.6 describe the organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- 3.7 explain their own preferences and comfort levels relating to how they are willing and able to personalise service

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence of making customer service personal:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 6 Your evidence must include examples of how you have dealt with customers who are:
  - a happy with the service they are receiving
  - b unhappy about the service they are receiving.
- 7 You must provide evidence that you have made customer service more personal:
  - a when you have taken the initiative
  - b in response to an opportunity presented when your customer has asked a question.

**Level:** 2

**Credit value:** 6

**NDAQ number:** M/601/1220

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Distinguish between routine service standards and going the extra mile
- 2 Check that your extra mile ideas are feasible
- 3 Go the extra mile
- 4 Know how to go the extra mile in customer service

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A9 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Distinguish between routine service standards and going the extra mile****Assessment Criteria**

The learner can:

- 1.1 explain the service offer clearly and concisely
- 1.2 identify their customer's expectations and needs
- 1.3 match the service offer with their customer's expectations and needs and identify the key differences
- 1.4 identify options for other actions that will give added value to customer service and might impress their customer
- 1.5 choose actions that are most appropriate to impress their customer

**Outcome 2: Check that your extra mile ideas are feasible****Assessment Criteria**

The learner can:

- 2.1 match their ideas for added value customer service against their authority to see them through
- 2.2 check that their ideas for added value customer service are possible within their organisation's guidelines
- 2.3 check that their ideas for added value customer service are possible within regulatory boundaries
- 2.4 check that their ideas for added value customer service will not unreasonably affect the service to their other customers
- 2.5 explain their ideas for added value service to a senior colleague or other appropriate authority

**Outcome 3: Go the extra mile****Assessment Criteria**

The learner can:

- 3.1 take action to go the extra mile in customer service
- 3.2 ensure that their customer is aware of the added value of their actions
- 3.3 monitor the effects of their added value actions to ensure that the service given to their other customers is not affected unreasonably
- 3.4 note and pass on positive feedback from their customer about their actions
- 3.5 suggest that an extra mile action becomes routine if they have seen it work several times and it could be accommodated within the service offer

## Outcome 4: Know how to go the extra mile in customer service

### Assessment Criteria

The learner can:

- 4.1 describe their organisation's service offer
- 4.2 explain how customers form expectations of the service they will receive
- 4.3 identify what types of service action most customers will see as adding value to the customer service they have already had
- 4.4 outline their organisation's rules and procedures that determine their authority to go the extra mile
- 4.5 identify relevant legislation and regulation that impact on their freedom to go the extra mile
- 4.6 describe how their organisation receives customer service feedback on the types of customer experience that has impressed them
- 4.7 describe their organisation's procedures for making changes in its service offer

### Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of going the extra mile with customers:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 5 Your evidence must show that you have:
  - a followed organisational procedures to go the extra mile for customers
  - b used your own initiative when going the extra mile for customers.

**Level:** 2

**Credit value:** 5

**NDAQ number:** T/601/1221

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Communicate effectively with their customer
- 2 Improve the rapport with their customer through body language
- 3 Understand how to deal with customers face to face

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A10 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Communicate effectively with their customer****Assessment Criteria**

The learner can:

- 1.1 plan a conversation with their customer that has structure and clear direction
- 1.2 hold a conversation with their customer that establishes rapport
- 1.3 focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation
- 1.4 explain their services or products and their organisation's service offer to their customer clearly and concisely
- 1.5 adapt their communication to meet the individual needs of their customer
- 1.6 anticipate their customer's requests and needs for information
- 1.7 balance conflicting demands for their attention whilst maintaining rapport with their current customer
- 1.8 calm down situations when one customer is adversely affecting the customer service enjoyed by other customers

**Outcome 2: Improve the rapport with their customer through body language****Assessment Criteria**

The learner can:

- 2.1 present a professional and respectful image when dealing with their customer
- 2.2 show an awareness of their customer's needs for personal space
- 2.3 focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation
- 2.4 ensure that their customer focus is not disrupted by colleagues
- 2.5 observe all customers and the total customer service situation whilst maintaining rapport with their current customer
- 2.6 observe their customer to read non-verbal clues about the customer's wishes and expectations

**Outcome 3: Understand how to deal with customers face to face****Assessment Criteria**

The learner can:

- 3.1 explain the importance of speaking clearly and slowly when dealing with a customer face to face
- 3.2 state the importance of taking the time to listen carefully to what the customer is saying

- 3.3 identify the organisation's procedures that impact on the way they are able to deal with their customers face to face
- 3.4 describe the features and benefits of the organisation's services or products
- 3.5 explain the organisation's service offer and how it affects the way they deal with customers face to face
- 3.6 explain the principles of body language that enables them to interpret customer feelings without verbal communication
- 3.7 explain the difference between behaving assertively, aggressively and passively
- 3.8 explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
- 3.9 describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must include examples of dealing with customers who:
  - a have standard expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 5 Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
- 6 You must provide evidence of dealing with customers face to face:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 7 You must include examples of how you have made use of :
  - a verbal communication skills
  - b non-verbal communication skills.

## Unit 210

## Deal with incoming telephone calls from customers

**Level:** 2

**Credit value:** 5

**NDAQ number:** F/601/1223

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Use communication systems effectively
- 2 Establish rapport with customers who are calling
- 3 Deal effectively with customer questions and requests
- 4 Know how to deal with incoming telephone calls from customers

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A11 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.



### Outcome 1: Use communication systems effectively

#### Assessment Criteria

The learner can:

- 1.1 operate telecommunication equipment efficiently and effectively
- 1.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer
- 1.3 listen carefully when collecting information from their customer
- 1.4 select the information they need to record and store following their organisation's guidelines
- 1.5 update their customer records during or after the call to reflect the key points of the conversation

### Outcome 2: Establish rapport with customers who are calling

#### Assessment Criteria

The learner can:

- 2.1 greet their customer following their organisation's guidelines
- 2.2 listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call
- 2.3 confirm the identity of their customer following organisational guidelines
- 2.4 use effective and assertive questions to clarify their customer's requests

### Outcome 3: Deal effectively with customer questions and requests

#### Assessment Criteria

The learner can:

- 3.1 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each
- 3.2 choose the option that is most likely to lead to customer satisfaction within the service offer
- 3.3 give clear and concise information to customers in response to questions or requests
- 3.4 use questions and answers to control the length of the conversation
- 3.5 keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time
- 3.6 put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague
- 3.7 summarise the outcome of the call and any actions that they or their customer will take as a result

- 3.8 check before the call is finished that their customer is content that all their questions or requests have been dealt with
- 3.9 complete any follow up actions agreed during the call
- 3.10 take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests
- 3.11 ensure that promises to call back are kept

## **Outcome 4: Know how to deal with incoming telephone calls from customers**

### **Assessment Criteria**

The learner can:

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

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

- 4 You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
- 5 Your evidence must include examples of dealing with customers who:
  - a have standard expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 6 Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
- 7 You must provide evidence of dealing with customers by telephone:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 8 You must provide evidence that you have taken messages that are passed on to colleagues:
  - a verbally
  - b in a form that maintains a permanent record.

**Level:** 2

**Credit value:** 6

**NDAQ number:** J/601/1224

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Plan their calls effectively
- 2 Use communication systems effectively
- 3 Make focussed calls to their customer
- 4 Know how to make telephone calls to customers

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A12 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

### Outcome 1: Plan their calls effectively

#### Assessment Criteria

The learner can:

- 1.1 use all appropriate customer information to plan their call
- 1.2 anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer
- 1.3 identify the objective of their call and the way in which they expect the call to end
- 1.4 plan the opening part of their conversation with their customer and anticipate possible responses

### Outcome 2: Use communication systems effectively

#### Assessment Criteria

The learner can:

- 2.1 operate telecommunication equipment efficiently and effectively
- 2.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer
- 2.3 listen carefully when collecting information from their customer
- 2.4 select the information they need to record and store following their organisation's guidelines
- 2.5 update their customer records during or after the call to reflect the key points of the conversation

### Outcome 3: Make focussed calls to their customer

#### Assessment Criteria

The learner can:

- 3.1 open the conversation positively and establish a rapport with their customer
- 3.2 confirm the identity of their customer following organisational guidelines
- 3.3 ensure that their customer is aware of the purpose of their call as early as possible
- 3.4 respond positively to queries and objections from their customer
- 3.5 summarise the outcome of the call and any actions that they or their customer will take as a result
- 3.6 complete any follow up actions agreed during the call

## Outcome 4: Know how to make telephone calls to customers

### Assessment Criteria

The learner can:

- 4.1 describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls
- 4.2 describe their organisation's guidelines and procedures for the use of telecommunication technology
- 4.3 explain how to operate their organisation's telecommunication technology
- 4.4 explain the importance of speaking clearly and slowly when dealing with customers by telephone
- 4.5 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone
- 4.6 explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
- 4.7 identify what information it is important to note during or after telephone conversations with customers
- 4.8 describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
- 4.9 describe their organisation's guidelines and procedures for taking action to follow up calls made to customers

### Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
- 5 Your evidence must include examples of dealing with customers who:
  - a are receptive to the content of your call
  - b are not receptive to the content of your call.
- 6 You must provide evidence of dealing with customers by telephone:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

**Level:** 2

**Credit value:** 5

**NDAQ number:** J/601/1210

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Prepare to deal with customers
- 2 Give consistent service to customers
- 3 Check customer service delivery
- 4 Know how to deliver reliable customer service

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B2 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Prepare to deal with customers****Assessment Criteria**

The learner can:

- 1.1 keep their knowledge of their organisation's services or products up-to-date
- 1.2 ensure that the area they work in is tidy, safe and organised efficiently
- 1.3 prepare and arrange everything they need to deal with customers before their shift or period of work commences

**Outcome 2: Give consistent service to customers****Assessment Criteria**

The learner can:

- 2.1 make realistic customer service promises to customers
- 2.2 ensure that their promises balance the needs of their customers and their organisation
- 2.3 keep their promises to customers
- 2.4 inform their customers if they cannot keep their promises due to unforeseen circumstances
- 2.5 recognise when their customers' needs or expectations have changed and adapt their service to meet the new requirements
- 2.6 keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation

**Outcome 3: Check customer service delivery****Assessment Criteria**

The learner can:

- 3.1 check that the service they have given meets their customers' needs and expectations
- 3.2 identify when they could have given better service to customers and how their service could have been improved
- 3.3 share information with colleagues and service partners to maintain and improve their standards of service delivery.

**Outcome 4: Know how to deliver reliable customer service****Assessment Criteria**

The learner can:

- 4.1 describe their organisation's services or products
- 4.2 explain their organisation's procedures and systems for delivering customer service



- 4.3 describe methods or systems for measuring an organisation's effectiveness in delivering customer service
- 4.4 explain their organisation's procedures and systems for checking service delivery
- 4.5 explain their organisation's requirements for health and safety in their area of work

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you have worked with different customers who have different needs and expectations.
- 5 You must provide evidence of delivering reliable customer service:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

## Unit 213

## Deliver customer service on your customer's premises

**Level:** 2

**Credit value:** 5

**NDAQ number:** Y/601/1213

### Unit aim

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that the customer both enjoys the customer service experience and has confidence that the work carried out has been completed successfully. This unit is not simply about working in a different building. The learner's customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for the learner whose job takes them into their customers' homes.

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Establish a rapport with their customer
- 2 Combine customer service with their other skills and expertise
- 3 Know how to deliver customer service on the customer's premises

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B3 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Establish a rapport with their customer****Assessment Criteria**

The learner can:

- 1.1 prepare for a visit to customer premises and ensure the customer knows when and why they will be there
- 1.2 identify themselves to their customer showing official identification whenever possible
- 1.3 show a positive and friendly approach to the service they are about to give
- 1.4 use language and behaviour that show respect for their customer
- 1.5 explain to their customer exactly what they are going to do and approximately how long they expect the work to take
- 1.6 listen to any concerns that their customer may have and reassure them
- 1.7 keep their customer informed of progress and about any cause for delay that might take place
- 1.8 keep their customer informed of any variation to the work that could involve additional time or cost
- 1.9 consult their customer when they have to do work that the customer had not expected

**Outcome 2: Combine customer service with their other skills and expertise****Assessment Criteria**

The learner can:

- 2.1 show respect to customer's premises and possessions by treating them with care
- 2.2 make sure their customer is aware of their specialist technical skills
- 2.3 take time to give their customer confidence in their knowledge and skills
- 2.4 consider the customer service implications of each action and inform their customer of what will be involved
- 2.5 inform their customer when they have finished and reinforce how the work has been handled professionally
- 2.6 check that their customer is satisfied with the work and listen carefully to any feedback
- 2.7 inform their customer of timescales if any follow up work is involved
- 2.8 ensure that timescales for follow up work are kept
- 2.9 keep their customer informed if timescales for follow up work are not going to be met
- 2.10 explain clearly to their customer why they cannot do work that is not specified in the service offer
- 2.11 ensure that their customer has the appropriate details to contact their organisation if the customer needs to

## **Outcome 3: Know how to deliver customer service on the customer's premises**

### **Assessment Criteria**

The learner can:

- 3.1 describe what they can do to establish a rapport with the customers
- 3.2 explain the importance of sensitivity to people's feelings about their own premises and possessions
- 3.3 explain the regulatory and legal restrictions on what they can and cannot do in all aspects of their work
- 3.4 explain the insurance implications of working on their customer's premises
- 3.5 describe the organisational procedures they would take if they cause any accidental damage on their customer's premises

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you deliver excellent customer service:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 5 You must provide evidence that you deliver excellent customer service during:
  - a planned visits to your customer's premises
  - b visits to your customer's premises made at short notice.
- 6 You must provide evidence that you deliver excellent customer service:
  - a when your work goes to plan
  - b when your work does not go to plan.
- 7 You must provide evidence that you deliver excellent customer service:
  - a with your customer present
  - b when your customer is not present.

## Unit 214

## Recognise diversity when delivering customer service

**Level:** 2

**Credit value:** 5

**NDAQ number:** K/601/1216

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Respect customers as individuals and promote equality in customer service
- 2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers
- 3 Understand how to recognise diversity when delivering customer service

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B4 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Respect customers as individuals and promote equality in customer service****Assessment Criteria**

The learner can:

- 1.1 observe verbal and non-verbal clues that provide information about their customer's expectations and needs
- 1.2 identify and avoid features of stereotypes that might be applied to their customer that could carry the risk of causing offence
- 1.3 identify aspects of their customer's appearance or communication which risk leading them to treat the customer differently
- 1.4 consider aspects of their customer's appearance or communication in the light of their own beliefs about various groups of people that include their customer
- 1.5 question their customer to ensure that the impressions they are forming about their expectations and wishes are based on sound evidence
- 1.6 adjust their interpretation of the customer's expectations and wishes as a result of further evidence they have collected by talking to their customer

**Outcome 2: Adapt customer service to recognise the different needs and expectations of diverse groups of customers****Assessment Criteria**

The learner can:

- 2.1 follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- 2.2 show respect for their customer's individual beliefs, expectations and needs that may result from membership of a particular group
- 2.3 vary their approach to their customer to take account of beliefs, expectations and needs that result from membership of a particular group
- 2.4 work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group

## **Outcome 3: Understand how to recognise diversity when delivering customer service**

### **Assessment Criteria**

The learner can:

- 3.1 explain the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- 3.2 explain why consideration of diversity and inclusion issues affects customer service
- 3.3 describe organisational guidelines to make customer service inclusive for diverse groups of customers
- 3.4 explain how to observe and interpret non-verbal clues
- 3.5 describe how to listen actively for clues about their customer's expectations and needs
- 3.6 identify techniques for obtaining additional information from customers through tactful and respectful questions
- 3.7 describe behaviour that might cause offence to specific groups of people to whom they regularly provide customer service
- 3.8 explain how to impress specific groups of people to whom they regularly provide customer service

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must show that you have developed your approach to diversity taking account of:
  - a relevant legislation
  - b sector or industry codes of practice
  - c the policies and procedures of your own organisation.

- 5 You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to four of these sources of diversity:
- a age
  - b disability
  - c national origin
  - d sexual orientation
  - e values
  - f ethnic culture
  - g education
  - h lifestyle
  - i beliefs
  - j physical appearance
  - k social class
  - l economic status.
- 6 You must provide examples of situations when you have adapted your behaviour to:
- a deliberately adopt different approaches to different groups of customers
  - b deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements.



**Level:** 2

**Credit value:** 8

**NDAQ number:** A/601/1219

**Unit aim**

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

**Learning outcomes**

There are **three** learning outcomes to this unit.

The learner will:

- 1 Prepare to deal with customers with a different first language
- 2 Deal with customers who speak a different first language from their own
- 3 Know how to deal with customers across a language divide

**Guided learning hours**

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

**Details of the relationship between the unit and relevant national occupational standards**

This unit directly relates to the Customer Service NOS.

**Support of the unit by a sector or other appropriate body**

This unit has been developed by the Institute of Customer Service.

**Assessment**

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Prepare to deal with customers with a different first language****Assessment Criteria**

The learner can:

- 1.1 identify the language or languages other than their own that they are most likely to come across when dealing with customers
- 1.2 learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter
- 1.3 identify a source of assistance with a language they expect to encounter when delivering customer service
- 1.4 agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language
- 1.5 log useful words and phrases to support their dealings with a customer with a different first language
- 1.6 learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently

**Outcome 2: Deal with customers who speak a different first language from their own****Assessment Criteria**

The learner can:

- 2.1 identify their customer's first language and indicate to the customer that they are aware of this
- 2.2 establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs
- 2.3 speak clearly and slowly if using a language which is not the first language for either them or their customer
- 2.4 maintain a consistent tone and volume when dealing with somebody across a language divide
- 2.5 listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words
- 2.6 check their understanding of specific words with their customer using questions for clarification
- 2.7 seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers
- 2.8 reword a question or explanation if their customer clearly does not understand their original wording
- 2.9 use a few words of their customer's first language to create a rapport

## **Outcome 3: Know how to deal with customers across a language divide**

### **Assessment Criteria**

The learner can:

- 3.1 list the languages that they are most likely to encounter among groups of their customers
- 3.2 state how to greet, thank and say farewell to customers in their first languages
- 3.3 explain the importance of dealing with customers in their first language if possible
- 3.4 describe how to explain to a customer that they cannot hold an extended conversation in their first language
- 3.5 explain the importance of tone, pace and volume when dealing with customers across a language divide
- 3.6 identify possible sources of assistance to use when a language barrier demands additional language skills

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of dealing with customers across a language divide:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.

## Unit 216

## Use questioning techniques when delivering customer service

**Level:** 2

**Credit value:** 4

**NDAQ number:** A/601/1222

### Unit aim

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Establish rapport and identify customer concerns
- 2 Seek detailed information from customers using questioning techniques
- 3 Understand how to use questioning techniques when delivering customer service

### Guided learning hours

It is recommended that 27 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B6 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

### Outcome 1: Establish rapport and identify customer concerns

#### Assessment Criteria

The learner can:

- 1.1 greet their customer sincerely and invite a full and open response
- 1.2 use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry
- 1.3 invite more detailed explanation from their customer
- 1.4 listen closely to their customer's responses to strengthen their understanding of customer concerns
- 1.5 use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation
- 1.6 identify and note their customer's feelings and mood in relation to the information they are seeking

### Outcome 2: Seek detailed information from customers using questioning techniques

#### Assessment Criteria

The learner can:

- 2.1 follow a planned trail of questions to explore in detail customer concerns they have already identified
- 2.2 hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified
- 2.3 explain to their customer why they need the information they are asking for
- 2.4 use probing and searching questions that draw on comments or words used by their customer
- 2.5 thank their customer for the information in a way that encourages further open responses
- 2.6 use pre-planned routing and trigger questions that lead their customer to respond in new areas
- 2.7 follow organisational procedures to record customer responses to inform future actions

### Outcome 3: Understand how to use questioning techniques when delivering customer service

#### Assessment Criteria

The learner can:

- 3.1 explain why establishing rapport makes it easier to draw information from customers

- 3.2 describe ways to greet customers that immediately build rapport
- 3.3 explain reasons for using planned question patterns to draw out particular information
- 3.4 explain reasons for using spontaneous conversation to draw out particular information
- 3.5 explain the importance of active listening when seeking detailed information from customers
- 3.6 identify the differences between and uses of closed and open questions
- 3.7 describe the importance of explaining to customers why information is needed
- 3.8 explain why particular trigger questions are effective in gaining specific information

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of using questioning techniques when delivering customer service:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 5 You need to include evidence of using questioning techniques with customers who are:
  - a easy to deal with
  - b difficult to deal with.

**Level:** 2

**Credit value:** 5

**NDAQ number:** L/601/1225

**Unit aim**

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

**Learning outcomes**

There are **three** learning outcomes to this unit.

The learner will:

- 1 Prepare to deliver customer service using bespoke software
- 2 Deliver customer service using bespoke software
- 3 Understand how to deal with customers using bespoke software

**Guided learning hours**

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

**Details of the relationship between the unit and relevant national occupational standards**

This unit directly relates to Unit B7 of the Customer Service NOS 2010.

**Support of the unit by a sector or other appropriate body**

This unit has been developed by the Institute of Customer Service.

**Assessment**

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Prepare to deliver customer service using bespoke software****Assessment Criteria**

The learner can:

- 1.1 sign on and open access to appropriate functions in the IT system
- 1.2 navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas
- 1.3 explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver
- 1.4 ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- 1.5 prepare their work area to deliver customer service using bespoke software

**Outcome 2: Deliver customer service using bespoke software****Assessment Criteria**

The learner can:

- 2.1 identify their customer or the services or products they wish to access
- 2.2 follow organisational procedures to step through the system in a way that responds to their customer's needs
- 2.3 use search or other specialist functions within the software to respond to customer requests
- 2.4 enter new records using the bespoke software system
- 2.5 amend customer service records in the bespoke software system
- 2.6 communicate with their customers in terms they can understand relating to the software system
- 2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- 2.8 interpret error messages and act on them to support their customer service
- 2.9 refer their customer to a colleague following organisational procedures if they are unable to complete the transaction

**Outcome 3: Understand how to deal with customers using bespoke software****Assessment Criteria**

The learner can:

- 3.1 describe access and sign-on routines for the bespoke software system
- 3.2 describe the architecture and geography of the bespoke software system



- 3.3 identify different screen or menu routes that can be followed to meet customer requirements
- 3.4 identify sources of support and help for the bespoke software including manuals, help screens and help lines
- 3.5 explain the importance of preparing a work area before delivering customer service
- 3.6 explain search or other enquiry facilities within the bespoke software system
- 3.7 state the importance of avoiding jargon and system terminology when communicating with customers
- 3.8 describe ways to respond to error messages when using a bespoke software system
- 3.9 identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence of dealing with customers using bespoke software:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

## Unit 218

## Maintain customer service through effective handover

**Level:** 2

**Credit value:** 4

**NDAQ number:** Y/601/1227

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Agree joint responsibilities in a customer service team
- 2 Check that customer service actions are seen through by working together with colleagues
- 3 Understand how to maintain customer service through effective handover

### Guided learning hours

It is recommended that 27 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B8 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Agree joint responsibilities in a customer service team****Assessment Criteria**

The learner can:

- 1.1 identify services or products they are involved in delivering that rely on effective teamwork
- 1.2 identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues
- 1.3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another
- 1.4 agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action
- 1.5 identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action

**Outcome 2: Check that customer service actions are seen through by working together with colleagues****Assessment Criteria**

The learner can:

- 2.1 access reminders to identify when to check that a customer service action has been completed
- 2.2 ensure that they are aware of all details of customer service actions their colleague was due to complete
- 2.3 ask their colleague about the outcome of them completing the customer service action as agreed
- 2.4 identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed
- 2.5 work with colleagues to review the way in which customer service actions are shared

**Outcome 3: Understand how to maintain customer service through effective handover****Assessment Criteria**

The learner can:

- 3.1 explain their organisation's customer service procedures for the services or products they are involved in delivering
- 3.2 identify the appropriate colleagues to pass responsibility to for completing particular customer service actions

- 3.3 describe ways of ensuring that information is passed between them and their colleagues effectively
- 3.4 identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague
- 3.5 explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting
- 3.6 identify opportunities for contributing to review the way customer service actions are shared in customer service processes

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of maintaining customer service through effective hand over:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.
- 5 You do not need to be more senior than your colleague or be their supervisor to pass on responsibility to them for customer service actions or check completion.

**Level:** 2

**Credit value:** 6

**NDAQ number:** M/601/1511

**Unit aim**

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

**Learning outcomes**

There are **four** learning outcomes to this unit.

The learner will:

- 1 Spot customer service problems
- 2 Pick the best solution to resolve customer service problems
- 3 Take action to resolve customer service problems
- 4 Know how to resolve customer service problems

**Guided learning hours**

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

**Details of the relationship between the unit and relevant national occupational standards**

This unit directly relates to Unit C3 of the Customer Service NOS 2010.

**Support of the unit by a sector or other appropriate body**

This unit has been developed by the Institute of Customer Service.

**Assessment**

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Spot customer service problems****Assessment Criteria**

The learner can:

- 1.1 listen carefully to customers about any problem they have raised
- 1.2 ask customers about the problem to check their understanding
- 1.3 recognise repeated problems and alert the appropriate authority
- 1.4 share customer feedback with others to identify potential problems before they happen
- 1.5 identify problems with systems and procedures before they begin to affect customers

**Outcome 2: Pick the best solution to resolve customer service problems****Assessment Criteria**

The learner can:

- 2.1 identify the options for resolving a customer service problem
- 2.2 work with others to identify and confirm the options to resolve a customer service problem
- 2.3 work out the advantages and disadvantages of each option for their customer and the organisation
- 2.4 pick the best option for their customer and the organisation
- 2.5 identify for their customer other ways that problems may be resolved if they are unable to help

**Outcome 3: Take action to resolve customer service problems****Assessment Criteria**

The learner can:

- 3.1 discuss and agree the options for solving the problem with their customer
- 3.2 take action to implement the option agreed with their customer
- 3.3 work with others and their customer to make sure that any promises related to solving the problem are kept
- 3.4 keep their customer fully informed about what is happening to resolve the problem
- 3.5 check with their customer to make sure the problem has been resolved to the customer's satisfaction
- 3.6 give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction

## Outcome 4: Know how to resolve customer service problems

### Assessment Criteria

The learner can:

- 4.1 describe organisational procedures and systems for dealing with customer service problems
- 4.2 explain how to defuse potentially stressful situations
- 4.3 describe how to negotiate
- 4.4 identify the limitations of what they can offer their customer
- 4.5 describe types of action that may make a customer problem worse and should be avoided

### Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must include examples of resolving problems involving each of the following:
  - a a problem first identified by customers
  - b a problem identified within the organisation before it has affected your customer
  - c a problem caused by differences between your customer's expectations and what your organisation can offer
  - d a problem caused by a system or procedure failure
  - e a problem caused by a lack of resources or human error.
- 5 You must provide evidence that you:
  - a supplied relevant information when customers have requested it
  - b supplied relevant information when customers have not requested it
  - c have used agreed organisational procedures when solving problems
  - d have made exceptions to usual practice with the agreement of others.

## Unit 220

## Deliver customer service to difficult customers

**Level:** 2

**Credit value:** 6

**NDAQ number:** T/601/1512

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Recognise when customers may be difficult to deal with
- 2 Deal with difficult customers
- 3 Understand how to deliver customer service to difficult customers

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit C4 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.



**Outcome 1: Recognise when customers may be difficult to deal with****Assessment Criteria**

The learner can:

- 1.1 recognise types of customer behaviour that are difficult to deal with
- 1.2 identify aspects of their organisation's services or products that make it difficult to deal with customers
- 1.3 identify the signs and signals that indicate a customer may be difficult to deal with
- 1.4 put themselves in their customer's position and see the situation from the customer's point of view
- 1.5 identify reasons why their customers may be behaving in a way that is difficult to deal with
- 1.6 recognise the limits of difficult customer behaviour that their organisation will tolerate
- 1.7 identify things that they may do or say that will provoke difficult responses from their customer

**Outcome 2: Deal with difficult customers****Assessment Criteria**

The learner can:

- 2.1 listen patiently to what their customer wants to tell them
- 2.2 use direct and factual questions about their customer's feelings and what has happened to identify what might satisfy the customer
- 2.3 check their understanding of their customer's concerns by describing their view of the situation and options that might be available
- 2.4 express empathy with their customer without necessarily admitting fault on the part of their organisation
- 2.5 give clear statements or explanations of their organisation's position
- 2.6 agree a way forward that balances customer satisfaction with the needs of their organisation
- 2.7 enlist help from colleagues if options for action are outside of their authority
- 2.8 summarise clearly actions to be taken and reasons for those actions to complete the customer transaction
- 2.9 advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them
- 2.10 take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer

## **Outcome 3: Understand how to deliver customer service to difficult customers**

### **Assessment Criteria**

The learner can:

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

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 5 You must provide evidence of delivering customer service to difficult customers:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

## Unit 221

## Develop customer relationships

**Level:** 2

**Credit value:** 6

**NDAQ number:** T/601/1526

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Build their customer's confidence that the service they give will be excellent
- 2 Meet the expectations of their customers
- 3 Develop the long-term relationship between their customer and their organisation
- 4 Know how to develop customer relationships

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D1 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Build their customer's confidence that the service they give will be excellent****Assessment Criteria**

The learner can:

- 1.1 show that they behave assertively and professionally with customers
- 1.2 allocate the time they take to deal with their customer following organisational guidelines
- 1.3 reassure their customer that they are doing everything possible to keep the service promises made by the organisation

**Outcome 2: Meet the expectations of their customers****Assessment Criteria**

The learner can:

- 2.1 recognise when there may be a conflict between their customer's expectations and your organisation's service offer
- 2.2 balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer
- 2.3 work effectively with others to resolve any difficulties in meeting their customer's expectations

**Outcome 3: Develop the long-term relationship between their customer and their organisation****Assessment Criteria**

The learner can:

- 3.1 give additional help and information to their customer in response to customer questions and comments about their organisation's services or products
- 3.2 discuss expectations with their customer and explain how these compare with their organisation's services or products
- 3.3 advise others of feedback received from their customer
- 3.4 identify new ways of helping customers based on the feedback customers have given them
- 3.5 identify added value that their organisation could offer to long-term customers

**Outcome 4: Know how to develop customer relationships****Assessment Criteria**

The learner can:

- 4.1 describe their organisation's services or products

- 4.2 explain the importance of customer retention
- 4.3 explain how their own behaviour affects the behaviour of the customer
- 4.4 describe how to behave assertively and professionally with customers
- 4.5 describe how to defuse potentially stressful situations
- 4.6 identify the limitations of their organisation's service offer
- 4.7 compare how customer expectations may change as the customer deals with their organisation
- 4.8 identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- 4.9 explain the cost implications of bringing in new customers as opposed to retaining existing customers
- 4.10 identify who to refer to when considering any variation to their organisation's service offer

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence of taking actions to meet the needs and expectations of your customer and of your organisation:
  - a without being asked by your customer
  - b at your customer's request.
- 6 You must include evidence that you have balanced the needs of your customers and your organisation by:
  - a making use of alternative products or services offered by the organisation
  - b varying the service you would normally offer within organisational guidelines
  - c saying 'no' to your customer and explaining the limits of your organisation's service offer.

**Level:** 2

**Credit value:** 5

**NDAQ number:** A/601/1530

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Use feedback to identify potential customer service improvements
- 2 Implement changes in customer service
- 3 Assist with the evaluation of changes in customer service
- 4 Know how to support customer service improvements

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D2 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Use feedback to identify potential customer service improvements****Assessment Criteria**

The learner can:

- 1.1 gather informal feedback from their customers
- 1.2 use their organisation's procedures to collect feedback from their customers
- 1.3 use the information from their customers to develop a better understanding of their customer service experience
- 1.4 identify ways the service they give could be improved based on information they have gathered
- 1.5 share their ideas for improving customer service with colleagues

**Outcome 2: Implement changes in customer service****Assessment Criteria**

The learner can:

- 2.1 identify a possible change that could be made to improve customer service
- 2.2 present their idea for improving customer service to a colleague with the appropriate authority to approve the change
- 2.3 carry out changes to customer service procedures based on their own idea or proposed by their organisation
- 2.4 keep their customers informed of changes to customer service
- 2.5 give customers a positive impression of changes that have been made
- 2.6 work positively with others to support customer service changes

**Outcome 3: Assist with the evaluation of changes in customer service****Assessment Criteria**

The learner can:

- 3.1 discuss with others how changes to customer service are working
- 3.2 work with others to identify any negative effects of changes and how these can be avoided

**Outcome 4: Know how to support customer service improvements****Assessment Criteria**

The learner can:

- 4.1 explain how customer experience is influenced by the way service is delivered

- 4.2 identify how customer feedback is obtained
- 4.3 explain how to work with others to identify and support change in the way service is delivered
- 4.4 describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you have:
  - a contributed to improving customer service through your own efforts
  - b contributed to improving customer service by working with others.
- 5 Your evidence must cover two changes with which you have been actively involved. In each case you must be able to identify the part you played in;
  - a linking customer feedback with the reasons for the change
  - b implementing the change
  - c gathering customer reactions to the change.
- 6 Your evidence for each change must show how:
  - a the change has improved customer service
  - b your customers have reacted to the change.
- 7 Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.



## Unit 223

## Develop personal performance through delivering customer service

**Level:** 2

**Credit value:** 6

**NDAQ number:** R/601/1534

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Review performance in their customer service role
- 2 Prepare a personal development plan and keep it up to date
- 3 Undertake development activities and obtain feedback on their customer service performance
- 4 Understand how to develop their personal performance through delivering customer service

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D3 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Review performance in their customer service role****Assessment Criteria**

The learner can:

- 1.1 work with an appropriate person to establish what they need to know, understand and be able to do to work effectively in their customer service role
- 1.2 identify and review situations from their own positive and negative experiences as a customer
- 1.3 carry out a self assessment of their performance in their customer service role and identify their strengths, weaknesses and development needs

**Outcome 2: Prepare a personal development plan and keep it up to date****Assessment Criteria**

The learner can:

- 2.1 agree their strengths, weaknesses and development needs with an appropriate person
- 2.2 work with an appropriate person to draw up their own development objectives to improve their performance in their customer service role
- 2.3 develop a customer service personal development plan
- 2.4 regularly review their progress towards their objectives with an appropriate person

**Outcome 3: Undertake development activities and obtain feedback on their customer service performance****Assessment Criteria**

The learner can:

- 3.1 complete development activities identified in their customer service personal development plan
- 3.2 use their day to day experiences with their customers and their own experiences as a customer to develop their customer service performance
- 3.3 obtain feedback from an appropriate person about their customer service performance
- 3.4 review and update their customer service personal development plan

## **Outcome 4: Understand how to develop their personal performance through delivering customer service**

### **Assessment Criteria**

The learner can:

- 4.1 describe their organisation's systems and procedures for developing personal performance in customer service
- 4.2 explain how their behaviour has an effect on the behaviour of others
- 4.3 explain how effective learning depends on a process of planning, doing and reviewing
- 4.4 describe how to review effectively their personal strengths and development needs
- 4.5 describe how to put together a personal development plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service
- 4.6 explain how to access sources of information and support for their learning
- 4.7 explain how to obtain useful and constructive personal feedback from others
- 4.8 describe how to respond positively to personal feedback

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 An 'appropriate person' must be one or more of the following
  - your manager
  - your supervisor or team leader
  - a colleague detailed to help you learn
  - your assessor
  - your mentor
  - someone from your training or personnel department.
- 5 You must provide evidence that you have developed your personal development plan taking account of:
  - a information about the knowledge and skills relevant to your customer service role
  - b your own learning style preferences
  - c your workload
  - d opportunities for learning on the job.
- 6 Your personal development plan must be put on record and agreed with an appropriate person.

## Unit 224

## Support customers using on-line customer services

**Level:** 2

**Credit value:** 5

**NDAQ number:** H/601/1540

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Establish the type and level of support their customer needs to achieve on-line customer service
- 2 Support on-line customer service in conversation with their customer
- 3 Understand how to support customers using on-line services

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D4 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Establish the type and level of support their customer needs to achieve on-line customer service****Assessment Criteria**

The learner can:

- 1.1 ensure that they are up-to-date and with the on-line services that their customers use
- 1.2 identify what the customer is trying to achieve and what they are having difficulties with
- 1.3 question their customer to discover the customer's degree of familiarity with the system
- 1.4 offer their customer the option of trying the on-line approach once more
- 1.5 agree with their customer the exact nature of the problem and steps that may be taken to overcome it

**Outcome 2: Support on-line customer service in conversation with their customer****Assessment Criteria**

The learner can:

- 2.1 explore the on-line customer system in order to develop their own knowledge and skills in its use
- 2.2 step through the screen sequence with their customer whilst allowing them to operate the system for themselves
- 2.3 address their customer in an understanding and supportive manner
- 2.4 explain to their customer why certain steps are required in the process
- 2.5 offer the options to their customer of stepping them through the process or completing the transaction themselves
- 2.6 promote access to additional services or products when supporting customers on-line

**Outcome 3: Understand how to support customers using on-line services****Assessment Criteria**

The learner can:

- 3.1 explain how their organisation's system for on-line service delivery works
- 3.2 describe the importance of close active listening to discover what their customer is trying to achieve
- 3.3 identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
- 3.4 explain why it is generally preferable for their customer to complete a transaction for themselves

- 3.5 explain the importance of building customer confidence in using the on-line system by supporting and encouraging
- 3.6 compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves
- 3.7 identify additional services or products that may be promoted to on-line customers

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of supporting customers who are:
  - a new to the use of on-line services for this particular purpose
  - b familiar with the use of on-line services for this particular purpose
- 5 Your evidence must include examples of helping customers with difficulties caused by:
  - a the customer's use of the on-line services
  - b a system or equipment failure.

## Unit 225

## Buddy a colleague to develop their customer service skills

**Level:** 2

**Credit value:** 5

**NDAQ number:** M/601/1542

### Unit aim

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

### Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

- 1 Plan and prepare to buddy a colleague
- 2 Support their buddy colleague on the job
- 3 Provide buddy support off the job
- 4 Know how to buddy a colleague to develop their customer service skills

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D5 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Plan and prepare to buddy a colleague****Assessment Criteria**

The learner can:

- 1.1 agree with their colleague aspects of the colleague's work which may benefit most from their buddying support
- 1.2 confirm their understanding of their colleague's job tasks and responsibilities using reliable sources
- 1.3 clarify the customer service image and impression their colleague should present in their job
- 1.4 arrange times when it will be most helpful to work alongside their colleague
- 1.5 plan details of a buddy session to support their colleague on the job

**Outcome 2: Support their buddy colleague on the job****Assessment Criteria**

The learner can:

- 2.1 agree with their colleague where they will be placed near them when buddying them on the job
- 2.2 ensure their presence when their buddy is dealing with customers does not detract from effective customer service
- 2.3 carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow
- 2.4 observe their colleague closely to identify what they do well and areas in which they could improve
- 2.5 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- 2.6 praise their colleague on aspects of work which they have carried out well
- 2.7 explain to their colleague ways in which they can improve their customer service performance
- 2.8 make notes on their colleague's strengths and areas for development that they can discuss with their colleague

**Outcome 3: Provide buddy support off the job****Assessment Criteria**

The learner can:

- 3.1 arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers



- 3.2 identify areas of general interest that help to establish rapport with their buddy colleague
- 3.3 use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance
- 3.4 agree actions their buddy colleague can take to improve their customer service performance
- 3.5 offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience

## **Outcome 4: Know how to buddy a colleague to develop their customer service skills**

### **Assessment Criteria**

The learner can:

- 4.1 identify the tasks in their buddy colleague's job
- 4.2 identify areas of the job that benefit most from buddying support
- 4.3 describe the customer service image and impression that should be presented in their buddy colleague's job
- 4.4 identify the best times at which to work alongside their buddy colleague
- 4.5 identify ways to work alongside their buddy colleague without intruding on the customer relationship.
- 4.6 describe techniques for giving positive feedback and constructive criticism to their buddy colleague
- 4.7 explain the importance of establishing an effective rapport with their buddy colleague
- 4.8 review options for actions their buddy colleague can take to improve their customer service performance

### **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of buddying a colleague to develop their customer service skills:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down.

## Unit 226

## Develop your own customer service skills through self-study

**Level:** 2

**Credit value:** 6

**NDAQ number:** R/601/1548

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Find ways to learn more about customer service and their job
- 2 Use sources of self-development to extend their customer service skills and knowledge
- 3 Know how to develop their own customer service skills through self-study

### Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D6 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Find ways to learn more about customer service and their job****Assessment Criteria**

The learner can:

- 1.1 identify different sources of information and support that will help them to develop their customer service knowledge and skills
- 1.2 agree with their line manager, their mentor or others doing a similar job the best sources to use for self-development of their customer service knowledge and skills
- 1.3 take action to remind themselves to check on sources of information and support
- 1.4 search for additional sources of information to support their customer service learning
- 1.5 store materials that support self-study for future use
- 1.6 plan time to study the self-study materials they have collected

**Outcome 2: Use sources of self-development to extend their customer service skills and knowledge****Assessment Criteria**

The learner can:

- 2.1 access organisational update information to extend their knowledge of products and services
- 2.2 access organisational information to learn more about the way their role contributes to customer service
- 2.3 monitor publications to identify ideas and new developments in customer service which they could apply in their work
- 2.4 study collected information to develop their own customer service knowledge and skills
- 2.5 take action resulting from their learning to change the way they deal with customers
- 2.6 share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for further options
- 2.7 record actions they take to learn more about customer service and identify those which have the most positive effects

**Outcome 3: Know how to develop their own customer service skills through self-study****Assessment Criteria**

The learner can:

- 3.1 describe ways to locate information updating them on services and products

- 3.2 identify sources of information about customer service knowledge and skills that will help them to develop
- 3.3 list ways to store information that they use to develop their customer service skills
- 3.4 describe the importance of focus when self-studying to improve their customer service knowledge and skills
- 3.5 identify ways to convert information or ideas they have found through self-study into practical customer service actions
- 3.6 identify the value of discussing their learning with their line manager, their mentor or others doing a similar job
- 3.7 evaluate methods of recording actions to improve their customer service skills which have had positive effects

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must show that you have taken personal responsibility for identifying, locating and using learning materials with only limited guidance and support from your line manager, mentor or colleagues.
- 5 The information sources and learning materials referred to in your evidence may be any or all of the following:
  - a paper based
  - b on-line or other electronic media
  - c structured discussions.

## Unit 227

## Support customers using self-service technology

**Level:** 2

**Credit value:** 5

**NDAQ number:** Y/601/1549

### Unit aim

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

### Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

- 1 Identify the type of help needed by a customer using self-service technology
- 2 Assist a customer using self-service technology
- 3 Understand how to support customers using self-service technology

### Guided learning hours

It is recommended that 33 hours should be allocated for this unit, although patterns of delivery are likely to vary.

### Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D7 of the Customer Service NOS 2010.

### Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

### Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

**Outcome 1: Identify the type of help needed by a customer using self-service technology****Assessment Criteria**

The learner can:

- 1.1 prepare a standard demonstration of using the self-service equipment
- 1.2 prepare to answer frequently asked questions about the operation of the self-service equipment
- 1.3 identify signs of when a customer is having difficulty with the self service equipment
- 1.4 choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment

**Outcome 2: Assist a customer using self-service technology****Assessment Criteria**

The learner can:

- 2.1 maintain a professional, polite and approachable manner while they observe customers using self-help technology
- 2.2 demonstrate use of the self-service equipment to a customer
- 2.3 respond to a request for help from a customer using self-help equipment
- 2.4 make use of staff override options to clear self-service equipment for use by customers
- 2.5 talk a customer through use of the self-service equipment whilst allowing them to operate it
- 2.6 invite a customer to repeat the operation of the self-service equipment if that helps them to learn
- 2.7 make positive and encouraging comments to a customer who is learning to use the self-service equipment
- 2.8 explain to their customer why certain actions and steps are needed to operate self service equipment
- 2.9 troubleshoot problems with self-service equipment and report errors and issues to appropriate people

**Outcome 3: Understand how to support customers using self-service technology****Assessment Criteria**

The learner can:

- 3.1 explain why their organisation chooses to offer customers self-service equipment
- 3.2 explain all aspects of normal operation of the customer self-service equipment

- 3.3 state frequently asked questions about operation of the self-service equipment and effective answers to those questions
- 3.4 describe techniques for giving an effective demonstration of self-service equipment
- 3.5 identify signals and signs that a customer needs help with self-service equipment
- 3.6 describe organisational procedures for using staff intervention to clear self-service equipment
- 3.7 explain the importance of building customer confidence in using self-service equipment
- 3.8 describe organisational procedures for dealing with self-service equipment problems

## **Evidence requirements**

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 The self –service technology used in your evidence may be any technology used outside the home to allow customers to interact with an organisation and help themselves. Examples include, but are not restricted to, scanning groceries, printing a boarding pass, printing photos, buying from an automated vending machine, and using an electronic kiosk to obtain information of conduct a transaction.
- 5 You must provide evidence of supporting customers who are:
  - a new to the use of self-service equipment for this particular purpose
  - b familiar with the use of self-service equipment for this particular purpose
- 6 Your evidence must include examples of helping customers with difficulties caused by:
  - a the customer's use of the technology
  - b a system or equipment failure.

## Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on [www.cityandguilds.com](http://www.cityandguilds.com).

### ***Providing City & Guilds qualifications – a guide to centre and qualification approval***

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

***Ensuring quality*** contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

***Access to Assessment & Qualifications*** provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***  
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***  
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***  
Contains dates and information on the latest Centre events
- ***Online assessment***  
Contains information on how to register for GOLLA assessments.



City & Guilds  
**Skills for a brighter future**



[www.cityandguilds.com](http://www.cityandguilds.com)

## Useful contacts

### UK learners

General qualification information

T: +44 (0)844 543 0033

E: [learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)

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### International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: [intcg@cityandguilds.com](mailto:intcg@cityandguilds.com)

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### Centres

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)

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### Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: [singlesubjects@cityandguilds.com](mailto:singlesubjects@cityandguilds.com)

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### International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [intops@cityandguilds.com](mailto:intops@cityandguilds.com)

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### Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [walledgarden@cityandguilds.com](mailto:walledgarden@cityandguilds.com)

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### Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: [business\\_unit@cityandguilds.com](mailto:business_unit@cityandguilds.com)

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### Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: [feedbackandcomplaints@cityandguilds.com](mailto:feedbackandcomplaints@cityandguilds.com)

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