

Level 3 NVQ Diploma in Customer Service (4430-03)

Qualification handbook for centres
500/8818/X



www.cityandguilds.com
August 2011
Version 2.0

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City & Guilds
Skills for a brighter future



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1 Introduction to the qualification

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

Qualification title and level	Level 3 NVQ Diploma in Customer Service
City & Guilds qualification number	4430-03
Qualification accreditation number	500/ 8818/X
Last registration date	31/07/2014
Last certification date	31/07/2017

The level 3 City & Guilds NVQ Diploma in Customer Service qualification aims to provide opportunities to demonstrate understanding of customer service as a competitive tool and to be proactive in finding solutions both within and externally to their organisation. Candidates are likely to have significant responsibility for the delivery of both internal and external customer service within their team or organisation. Candidates will demonstrate their ability to analyse and respond to customers on a strategic level, suggesting improvements and leading in their implementation, using software solutions as appropriate.

Contacting the Sector Skills Body (SSB)

The Council for Administration (CFA)

Tel: 020 7091 9620

Website: www.cfa.uk.com

The Institute of Customer Service (ICS)

Tel: 01206 571 716

Fax: 01206 546 688

Website: www.instituteofcustomerservice.com

1.1 Qualification structure

To achieve the **Level 3 NVQ Diploma in Customer Service**, learners must achieve:

Minimum Credit Value: 42

A minimum of **22 credits** must be at **level 3**

The learner must achieve **12 credits** from the **Mandatory Units**.

A further **30 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
4430-301	Demonstrate understanding of customer service (F3)	3	6	40
4430-302	Demonstrate understanding of the rules that impact on improvements in customer service (F4)	3	6	40
City & Guilds unit number	Optional Units - Impression and Image	QCF Level	QCF Credit	GLH
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
4430-403	Champion customer service (A17)	4	10	67
4430-404	Make customer service environmentally friendly and sustainable (A18)	4	11	73
City & Guilds unit number	Optional Units - Delivery	QCF Level	QCF Credit	GLH
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
4430-405	Maintain and develop a healthy and safe customer service environment (B12)	4	8	53
4430-406	Plan, organise and control customer service operations (B13)	4	10	67
4430-407	Review the quality of customer service (B14)	4	8	53
4430-408	Build and maintain effective customer relations (B15)	4	8	53
4430-409	Deliver seamless customer service with a team (B16)	4	8	53
City & Guilds unit number	Optional Units - Handling Problems	QCF Level	QCF Credit	GLH
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
4430-410	Handle referred customer complaints (C8)	4	10	67
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
4430-411	Implement quality improvements to customer service (D14)	4	10	67
4430-412	Plan and organise the development of customer service staff (D15)	4	9	60
4430-413	Develop a customer service strategy for a part of an organisation (D16)	4	11	73
4430-414	Manage a customer service award programme (D17)	4	7	47
4430-415	Apply technology or other resources to improve customer service (D18)	4	11	73
4430-416	Review and re-engineer customer service processes (D19)	4	11	73
4430-417	Manage customer service performance (D20)	4	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 4 NVQ Diploma in Customer Service
- Level 3 NVQ Certificate in Customer Service
- Customer Service Advanced Apprenticeship
- NVQ/SVQs in other work-related areas (for example Administration, Retail, Contact Centres Accounting, IT and other technical sectors)
- Institute of Leadership and Management (ILM) qualifications

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	www.cityandguilds.com
Promotional materials	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

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 3 NVQ in Customer Service (4543-03) will be given automatic approval for the new Level 3 NVQ Diploma in Customer Service (4430-03). 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, e.g. 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 3 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.

The Assessor, IV and EV working at Level 3 must have:	This can be evidenced by:	A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 3 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 3	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 3	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.

Level 3 units

Assessment of the Level 3 NVQ Diploma in Customer Service Units should be carried out in a **real job (either paid or voluntary)**. Simulation and Realistic Working Environment is not accepted at this level by the Institute of Customer Service (ICS) Assessment Strategy.

Level 2 units

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:

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

This qualification is not approved for use by candidates under the age of 16 and City & Guilds cannot accept any registrations for candidates in this age group.

There are no other age limits attached to candidates undertaking this qualification unless it 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**
- Useful material is available from **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.

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

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

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**

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 301

Demonstrate understanding of customer service

Level: 3

Credit value: 6

NDAQ number: K/601/1622

Unit aim

This unit is about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles in this unit influence all aspects of making customer service work and enable the learner to place professional customer practice in the context of their industry sector and their own organisation. Above all, working as a customer service professional involves working with colleagues to develop deeper and broader understanding of customer service language and principles.

Learning outcomes

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

The learner will:

- 1 Follow their organisation's accepted customer service language
- 2 Apply customer service principles in their customer service role
- 3 Understand principles of 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 F3 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 accepted customer service language**Assessment Criteria**

The learner can:

- 1.1 communicate to customers their organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations
- 1.2 compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
- 1.3 discuss with colleagues steps that team members can take to deal with different customers and different customer service situations

Outcome 2: Apply customer service principles in their customer service role**Assessment Criteria**

The learner can:

- 2.1 follow the key policies and procedures in their organisation for the delivery of services or products
- 2.2 demonstrate how their organisation's service approach and service offer fit within their own industry and differ from those of other industries
- 2.3 discuss with colleagues how their organisation's ethical and value base fits with organisational needs and customer expectations

Outcome 3: Understand principles of customer service**Assessment Criteria**

The learner can:

- 3.1 describe how their organisation's service offer meets customer expectations
- 3.2 explain how their organisation's service offer is affected by financial and other resource limitations
- 3.3 identify the impact that their organisation's service offer may have on different people in the service chain
- 3.4 explain how customers form their expectations of the services or products
- 3.5 explain the importance of effective teamwork for the delivery of excellent customer service
- 3.6 describe how customer service can contribute to best value in a public sector or third sector organisation
- 3.7 explain how customer service can provide a competitive advantage for a commercial organisation
- 3.8 describe why their organisation must limit the customer service it gives to balance customer satisfaction with organisational goals

- 3.9 explain how to deal with different customer behaviours and personalities to achieve customer satisfaction
- 3.10 explain the importance of effective communication in the delivery of excellent customer service
- 3.11 describe how they ensure their communication with diverse groups of customers is effective and efficient
- 3.12 describe the importance of continuous improvement within customer service
- 3.13 explain the key policies and procedures in their organisation for the delivery of services or products and why it is important to follow them
- 3.14 explain how their industry's approach to customer service differs from the approach of another industry
- 3.15 outline the service offer of competitors of their organisation or any organisations offering similar services or products
- 3.16 describe the features and benefits of their organisation's services or products that influence customer service delivery and customer satisfaction
- 3.17 explain how their organisation balances its needs with customer expectations and needs
- 3.18 justify the ethical and value base of their organisation's approach to customer service
- 3.19 explain how their behaviour when improving customer service delivery affects the success of any changes to customer expectations and needs

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
- 5 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.

Unit 302

Demonstrate understanding of the rules that impact on improvements in customer service

Level: 3

Credit value: 6

NDAQ number: J/601/1627

Unit aim

This unit is about the rules, regulation and legislation that can impact on the way the learner develops and improves customer service. It requires the learner to demonstrate that they follow those rules when taking actions to improve customer service.

Learning outcomes

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

The learner will:

- 1 Demonstrate an understanding of the organisational rules and procedures that impact on customer service improvements
- 2 Demonstrate an understanding of the legislation and external regulation that impact on customer service improvements
- 3 Understand the rules that impact on improvements 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 F4 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: Demonstrate an understanding of the organisational rules and procedures that impact on customer service improvements**Assessment Criteria**

The learner can:

- 1.1 identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
- 1.2 identify procedures and actions needed to gain approval for proposed improvements in customer service
- 1.3 agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements

Outcome 2: Demonstrate an understanding of the legislation and external regulation that impact on customer service improvements**Assessment Criteria**

The learner can:

- 2.1 identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
- 2.2 identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
- 2.3 balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements

Outcome 3: Understand the rules that impact on improvements in customer service**Assessment Criteria**

The learner can:

- 3.1 describe organisational policies, procedures and practices that they need to take into account when they propose improvements in customer service
- 3.2 explain how to gain approval to change customer service procedures or practices
- 3.3 state the limits of their own authority and who else in the organisation needs to be involved if they cannot authorise improvements alone
- 3.4 explain how they would involve colleagues or service partners in the implementation of improvements
- 3.5 explain relevant legislation and external regulation relating to consumer protection
- 3.6 explain relevant legislation and external regulation relating to data protection

- 3.7 explain relevant legislation and external regulation relating to disability discrimination and equal opportunities
- 3.8 explain relevant legislation and external regulation relating to diversity, inclusion and discrimination for reasons other than disability or equal opportunities
- 3.9 explain relevant legislation and external regulation relating to health and safety of customers and colleagues
- 3.10 compare the need to balance the requirements of legislation and external regulation with the needs and objectives of their organisation
- 3.11 explain legislation and external regulation that affect customer service in their industry in particular

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

Unit 303

Deal with customers in writing or electronically

Level: 3

Credit value: 6

NDAQ number: R/601/1226

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Use written or electronic communication effectively
- 2 Plan and send an effective written or electronic communication
- 3 Handle incoming written or electronic communications effectively
- 4 Know how to deal with customers in writing or electronically

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 A13 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 written or electronic communication effectively**Assessment Criteria**

The learner can:

- 1.1 operate equipment used to communicate in writing or electronically efficiently and effectively
- 1.2 ensure that the period of time between exchanges in writing or electronically represents excellent customer service
- 1.3 use language that is clear and concise
- 1.4 adapt their use of language to meet the individual needs of their customer
- 1.5 ensure that the style and tone of their written or electronic communication follows their organisation's guidelines and matches the service offer

Outcome 2: Plan and send an effective written or electronic communication**Assessment Criteria**

The learner can:

- 2.1 anticipate their customer's expectations taking account of any previous exchanges they may have had
- 2.2 assemble all the information they need to construct the communication
- 2.3 plan the objective of their communication
- 2.4 format their communication following their organisation's guidelines
- 2.5 open the communication positively to establish a rapport with their customer
- 2.6 ensure that their customer is aware of the purpose of the communication as early as possible
- 2.7 summarise the key point of the communication and any actions that they or their customer will take as a result

Outcome 3: Handle incoming written or electronic communications effectively**Assessment Criteria**

The learner can:

- 3.1 read their customer's communication carefully to identify their precise reason for contacting you
- 3.2 identify what they are seeking as the outcome of the contact
- 3.3 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each

- 3.4 choose the option that is most likely to lead to customer satisfaction within the service offer
- 3.5 summarise the outcome of the communication and any actions that they or their customer will take as a result

Outcome 4: Know how to deal with customers in writing or electronically

Assessment Criteria

The learner can:

- 4.1 explain the importance of using clear and concise language
- 4.2 explain the additional significance and potential risks involved in committing a communication to a permanent record format
- 4.3 describe the effects of style and tone on the reader of a written or electronic communication
- 4.4 explain the importance of adapting their language to meet the needs of customers who may find the communication hard to understand
- 4.5 describe their organisation's guidelines and procedures relating to written and electronic communication
- 4.6 explain how to operate equipment used for producing and sending written or electronic communications
- 4.7 explain the importance of keeping their customer informed if there is likely to be any delay in responding to a communication
- 4.8 explain the risks associated with the confidentiality of written or electronic communications

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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 in writing, by text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
- 5 Your evidence must include examples of dealing with customers who:
 - a have routine 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 The style and tone of your communication must follow organisational guidelines and you must provide evidence that you have taken account of:
 - a your job role and position in your organisation
 - b the personal style and preferences of your customer
 - c the conventions of the medium of communication you are using.
- 7 You must show that you have communicated with customers when:
 - a you have initiated the contact
 - b you are responding to a customer.

Level: 3

Credit value: 8

NDAQ number: D/601/1228

Unit aim

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and product. The unit is not for a learner whose organisation does not compete actively with others.

Learning outcomes

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

The learner will:

- 1 Organise customer service to gain a competitive advantage
- 2 Deliver a competitive service
- 3 Understand how to use customer service as a competitive tool

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 Unit A14 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: Organise customer service to gain a competitive advantage**Assessment Criteria**

The learner can:

- 1.1 develop their own and colleagues' understanding of the services and products offered by their organisation
- 1.2 define their organisation's service offer and the ways in which it compares with those of their competitors
- 1.3 set an example for colleagues and present an image to their customers that reinforces their organisation's service offer
- 1.4 encourage customer service actions that create and develop customer loyalty

Outcome 2: Deliver a competitive service**Assessment Criteria**

The learner can:

- 2.1 take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation's service offer
- 2.2 remind customers about their service offer and the extra benefit it provides over those of their competitors
- 2.3 offer additional technical advice to customers within their organisation's service offer
- 2.4 show awareness of the financial implications of any added value actions that they or their colleagues might offer
- 2.5 meet customer service targets to ensure that customers see the benefit of dealing with them rather than with a competitor
- 2.6 re-direct customers to other service providers without offence when their expectations cannot be met by the organisation's service offer
- 2.7 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- 2.8 encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them

Outcome 3: Understand how to use customer service as a competitive tool**Assessment Criteria**

The learner can:

- 3.1 identify the factors that lead to customers' belief that they are enjoying value for money
- 3.2 describe the services and products offered by their organisation
- 3.3 describe the services and products offered by competitors

- 3.4 identify the features and benefits of services and products that are seen by customers as added value
- 3.5 explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- 3.6 explain how to portray a positive image that reinforces their organisation's competitive position
- 3.7 explain their organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- 3.8 describe complementary services and products that may be of interest to their 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:
 - a tangible in that they can be measured
 - b intangible in that they are represented solely by feelings and perceptions of the customer experience.
- 5 Your evidence must include examples of competitive analysis involving:
 - a direct competitors
 - b competitors offering substitute services or products.
- 6 Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
 - a loyal customers
 - b customers returning from competitors
 - c new customers.

Unit 305

Organise the promotion of additional services or products to customers

Level: 3

Credit value: 7

NDAQ number: D/601/1231

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Offer additional services or products.
- 2 Organise support to promote use of additional services or products
- 3 Monitor the promotion of additional services or products
- 4 Understand how to organise and promote services or products to customers

Guided learning hours

It is recommended that 47 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 A15 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: Offer additional services or products.**Assessment Criteria**

The learner can:

- 1.1 offer additional services or products to customers
- 1.2 identify the benefits of offering additional services or products for customers and the organisation
- 1.3 explain the features and benefits of additional services or products to customers
- 1.4 identify ways of encouraging customers to ask about additional services or products

Outcome 2: Organise support to promote use of additional services or products**Assessment Criteria**

The learner can:

- 2.1 discuss with others ways of promoting additional services or products to customers
- 2.2 implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- 2.3 promote services or products which will suit customers but which are supplied from outside their own area of the organisation
- 2.4 help customers to access services or products which are supplied outside of their own area of the organisation

Outcome 3: Monitor the promotion of additional services or products**Assessment Criteria**

The learner can:

- 3.1 devise methods to inform customers about additional services or products
- 3.2 use different methods to inform customers about additional services and products and record successes and failures against each method
- 3.3 use their record of successes and failures to identify the best approach for offering additional services or products
- 3.4 share information with others regarding the best approach to take when offering additional services or products to customers

Outcome 4: Understand how to organise and promote services or products to customers

Assessment Criteria

The learner can:

- 4.1 describe their organisation's procedures and systems for encouraging the use of additional services or products
- 4.2 explain how the use of additional services or products will benefit their customers
- 4.3 describe the main factors that influence customers to use their services or products
- 4.4 explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- 4.5 describe 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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:
 - a use agreed organisational procedures and systems
 - b create your own opportunities.
- 5 Your evidence must show that you have:
 - a taken responsibility for your own actions in promoting services or products
 - b used spontaneous customer feedback to identify opportunities for promoting services or products
 - c used customer feedback that you have requested to identify opportunities for promoting services or products
- 6 Your evidence must include examples of:
 - a existing customers extending their use of your services or products
 - b new customers making use of your services or products.

Level: 3

Credit value: 7

NDAQ number: K/601/1233

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Input details of customer queries and requests and develop responses
- 2 Use a customer service knowledge base
- 3 Understand how to build a customer service knowledge set

Guided learning hours

It is recommended that 47 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 A16 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: Input details of customer queries and requests and develop responses**Assessment Criteria**

The learner can:

- 1.1 identify through active listening customer queries and comments for inclusion in the knowledge set
- 1.2 classify information collected through customer contact for inclusion in the knowledge set
- 1.3 identify questions frequently asked by customers
- 1.4 identify the broad customer service messages of their organisation's answers to frequently asked questions
- 1.5 work with colleagues to develop responses to customer queries and requests
- 1.6 contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages
- 1.7 check the effects of possible responses included in the knowledge set with customers
- 1.8 monitor the customer service knowledge set to identify trends and patterns

Outcome 2: Use a customer service knowledge base**Assessment Criteria**

The learner can:

- 2.1 access information from the customer service knowledge set using specific search criteria
- 2.2 browse the customer service knowledge set to research a topic of interest or project area
- 2.3 use the customer service knowledge set to inform the introduction of a new product or service variation
- 2.4 use the customer service knowledge set to respond to a specific customer request or query
- 2.5 assist a colleague to locate specific information in the customer service knowledge set
- 2.6 add to the customer service knowledge set as a result of dealing with a customer request or query

Outcome 3: Understand how to build a customer service knowledge set**Assessment Criteria**

The learner can:

- 3.1 explain the structure and content of their organisation's customer service information set
- 3.2 describe how to input and update routines for adding to the customer service knowledge set

- 3.3 identify ways that information in a customer service knowledge set can be classified
- 3.4 identify questions frequently asked by customers of their organisation
- 3.5 explain the importance of working with colleagues to develop responses to customer requests and queries
- 3.6 describe their organisation's key messages in relation to the services or products they are delivering
- 3.7 identify ways to interpret information in a customer service knowledge set
- 3.8 describe techniques for assisting a colleague to locate information in a customer service knowledge set

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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.

There are no additional evidence requirements other than those expressed within the Unit.

Unit 307

Deliver customer service using service partnerships

Level: 3

Credit value: 6

NDAQ number: H/601/1229

Unit aim

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively. This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of the learner's work.

Learning outcomes

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

The learner will:

- 1 Work effectively within a customer service chain
- 2 Build and nurture positive relationships in a customer service chain
- 3 Understand how to deliver customer service using service partnerships

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 B9 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: Work effectively within a customer service chain**Assessment Criteria**

The learner can:

- 1.1 explain who is involved in the service chain that supplies their end user customers
- 1.2 identify which of those involved in their service chain is internal and which is external to their organisation
- 1.3 explain how the way they work with individual service partners contributes to an overall service chain
- 1.4 use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- 1.5 work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- 1.6 communicate effectively with internal customers to ensure that those customers are aware of any aspects of their work that might affect them

Outcome 2: Build and nurture positive relationships in a customer service chain**Assessment Criteria**

The learner can:

- 2.1 create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
- 2.2 identify where power and authority exist within the service chain
- 2.3 negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- 2.4 develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship
- 2.5 work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- 2.6 agree with service partners how their work will be prioritised if there is a conflict of interest between the demands of internal and external customers

Outcome 3: Understand how to deliver customer service using service partnerships

Assessment Criteria

The learner can:

- 3.1 describe the responsibilities and rights that can be built into an internal customer/supplier relationship
- 3.2 compare the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- 3.3 explain how to establish priorities if internal customer demands conflict with external customer demands
- 3.4 describe how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- 3.5 explain how to negotiate successfully with internal customers or suppliers
- 3.6 evaluate the formal and informal structures of the organisation and how they can influence relationships

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 produce 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 service level agreement between service partners in your evidence may be formal or informal.
- 5 You must provide examples of working in a service partnership on occasions when:
 - a the service partners are cooperative
 - b the service partners are un-cooperative.
- 6 You must include evidence to show that you have worked in a service partnership with:
 - a regular or long term suppliers
 - b new suppliers.
- 7 Your evidence must show that you have negotiated agreements with service partners that are of benefit to:
 - a your organisation
 - b your service partner

Unit 308

Organise the delivery of reliable customer service

Level: 3

Credit value: 6

NDAQ number: Y/601/1230

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Plan and organise the delivery of reliable customer service
- 2 Review and maintain customer service delivery
- 3 Use recording systems to maintain reliable customer service
- 4 Understand how to organise the delivery of reliable 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 B10 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 organise the delivery of reliable customer service**Assessment Criteria**

The learner can:

- 1.1 plan, prepare and organise everything they need to deliver services or products to different types of customers
- 1.2 organise what they do to ensure that they are consistently able to give prompt attention to your customers
- 1.3 reorganise their work to respond to unexpected additional workloads

Outcome 2: Review and maintain customer service delivery**Assessment Criteria**

The learner can:

- 2.1 maintain service delivery during very busy periods and unusually quiet periods
- 2.2 maintain service delivery when systems, people or resources have let them down
- 2.3 consistently meet their customers' expectations
- 2.4 balance the time they take with their customers with the demands of other customers seeking their attention
- 2.5 respond appropriately to their customers when customers make comments about the products or services they are offering
- 2.6 alert others to repeated comments made by their customers
- 2.7 take action to improve the reliability of their service based on customer comments
- 2.8 monitor the action they have taken to identify improvements in the service they give to their customers

Outcome 3: Use recording systems to maintain reliable customer service**Assessment Criteria**

The learner can:

- 3.1 record and store customer service information accurately following organisational guidelines
- 3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- 3.3 quickly locate information that will help solve a customer's query
- 3.4 supply accurate customer service information to others using the most appropriate method of communication

Outcome 4: Understand how to organise the delivery of reliable customer service

Assessment Criteria

The learner can:

- 4.1 describe organisational procedures for unexpected situations and their role within them
- 4.2 describe resource implications in times of staff sickness and holiday periods and their responsibility at these times
- 4.3 explain the importance of having reliable and fast information for their customers and their organisation
- 4.4 evaluate the organisational procedures and systems for delivering customer service
- 4.5 identify useful customer feedback and explain how to decide which feedback should be acted on
- 4.6 describe how to communicate feedback from customers to others
- 4.7 evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- 4.8 explain the legal and regulatory requirements regarding the storage of data

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 need to include evidence that you have dealt with a variety of customers including:
 - a customers who are easy to deal with
 - b customers who are difficult to deal with
 - c existing customers
 - d new customers.
- 5 Your evidence must show that you have:
 - a taken responsibility for your own actions in the delivery of customer service
 - b used spontaneous customer feedback to improve customer service
 - c used customer feedback that you have requested to improve customer service
- 6 The system you use for recording data can be manual or electronic.

Level: 3

Credit value: 7

NDAQ number: H/601/1232

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Improve communication with their customers
- 2 Balance the needs of their customer and their organisation
- 3 Exceed customer expectations to develop the relationship
- 4 Understand how to improve the customer relationship

Guided learning hours

It is recommended that 47 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 B11 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: Improve communication with their customers**Assessment Criteria**

The learner can:

- 1.1 select and use the best method of communication to meet their customers' expectations
- 1.2 take the initiative to contact their customers to update them when things are not going to plan or when they require further information
- 1.3 adapt their communication to respond to individual customers' feelings

Outcome 2: Balance the needs of their customer and their organisation**Assessment Criteria**

The learner can:

- 2.1 meet their customers' expectations within their organisation's service offer
- 2.2 explain the reasons to their customers sensitively and positively when customer expectations cannot be met
- 2.3 identify alternative solutions for their customers either within or outside the organisation
- 2.4 identify the costs and benefits of these solutions to their organisation and to their customers
- 2.5 negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation
- 2.6 take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation

Outcome 3: Exceed customer expectations to develop the relationship**Assessment Criteria**

The learner can:

- 3.1 make extra efforts to improve their relationship with their customers
- 3.2 recognise opportunities to exceed their customers' expectations
- 3.3 take action to exceed their customers' expectations within the limits of their own authority
- 3.4 gain the help and support of others to exceed their customers' expectations

Outcome 4: Understand how to improve the customer relationship**Assessment Criteria**

The learner can:

- 4.1 describe how to make best use of the method of communication chosen for dealing with their customers

- 4.2 explain how to negotiate effectively with their customers
- 4.3 explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make
- 4.4 explain the importance of customer loyalty and/or improved internal customer relationships to their organisation

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 using:
 - a organisational procedures
 - b exceptions to standard practice that are legal and benefit your organisation.
- 5 You need to provide evidence that you have dealt with customers who:
 - a have different needs and expectations
 - b appear angry or confused
 - c behave unusually.

Level: 3

Credit value: 6

NDAQ number: J/601/1515

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Solve immediate customer service problems
- 2 Identify repeated customer service problems and options for solving them
- 3 Take action to avoid the repetition of customer service problems
- 4 Understand how to monitor and solve 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 C5 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: Solve immediate customer service problems**Assessment Criteria**

The learner can:

- 1.1 respond positively to customer service problems following organisational guidelines
- 1.2 solve customer service problems when they have sufficient authority
- 1.3 work with others to solve customer service problems
- 1.4 keep customers informed of the actions being taken
- 1.5 check with customers that they are comfortable with the actions being taken
- 1.6 solve problems with service systems and procedures that might affect customers before customers become aware of them
- 1.7 inform managers and colleagues of the steps taken to solve specific problems

Outcome 2: Identify repeated customer service problems and options for solving them**Assessment Criteria**

The learner can:

- 2.1 identify repeated customer service problems
- 2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- 2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation

Outcome 3: Take action to avoid the repetition of customer service problems**Assessment Criteria**

The learner can:

- 3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- 3.2 action their agreed solution
- 3.3 keep their customers informed in a positive and clear manner of steps being taken to solve any service problems
- 3.4 monitor the changes they have made and adjust them if appropriate

Outcome 4: Understand how to monitor and solve customer service problems

Assessment Criteria

The learner can:

- 4.1 Describe organisational procedures and systems for dealing with customer service problems
- 4.2 describe the organisational procedures and systems for identifying repeated customer service problems
- 4.3 explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- 4.4 explain how to negotiate with and reassure customers while their problems are being solved

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 problems which are:
 - a brought to your attention by customers
 - b are identified first by you and/or by a colleague.
- 5 The problems included in your evidence must include examples of a:
 - a difference between customer expectations and what is offered by your organisation
 - b problem resulting from a system or procedure failure
 - c problem resulting from a shortage of resources or human error.
- 6 You must show that you have considered the options for solving problems from the point of view of:
 - a your customer
 - b the potential benefits to your organisation
 - c the potential risks to your organisation.
- 7 You must provide evidence that you have made use of options that:
 - a follow organisational procedures or guidelines
 - b make agreed and authorised exceptions to usual practice.

Level: 3
Credit value: 10
NDAQ number: D/601/1519

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Analyse customer service processes for risk
- 2 Assess customer service risks and take appropriate actions
- 3 Understand how to apply risk assessment to customer service

Guided learning hours

It is recommended that 67 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 C6 of the Customer Service NOS 2010

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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: Analyse customer service processes for risk**Assessment Criteria**

The learner can:

- 1.1 explain their organisation's customer service process and identify the moments of truth (those points in the customer service process that have most impact on the customer experience)
- 1.2 identify the financial risks for each stage of the customer service process
- 1.3 identify the reputational risks for each stage of the customer service process
- 1.4 identify the health and safety risks for each stage of the customer service process
- 1.5 identify the risk of delivering sub-standard services or products for each stage of the customer service process
- 1.6 ensure that your customers are aware of any risks that might impact on them
- 1.7 develop staff awareness of the risks they have identified

Outcome 2: Assess customer service risks and take appropriate actions**Assessment Criteria**

The learner can:

- 2.1 assess the probabilities of each risk that they have identified
- 2.2 assess the consequence of each risk in terms of finance, reputation and health and safety
- 2.3 classify each risk as high, medium or low taking into account its probability and consequences
- 2.4 work with colleagues to identify any actions that might be taken to reduce risk
- 2.5 take appropriate actions to minimise the overall customer service risk profile by adapting procedures

Outcome 3: Understand how to apply risk assessment to customer service**Assessment Criteria**

The learner can:

- 3.1 describe risk assessment techniques
- 3.2 explain how to evaluate risk according to probability of occurrence and consequences of occurrence
- 3.3 evaluate the nature of potential customer service risks including financial, reputational and health and safety risks
- 3.4 explain cost/benefit analysis
- 3.5 define SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 procedures you follow for risk assessment may be formal or informal and may or may not be written.
- 5 You must provide evidence that you have identified risks in your own area of responsibility:
 - a through your everyday work
 - b actively carrying out a risk assessment
 - c through discussion with colleagues.
- 6 Your evidence must show that when carrying out a risk assessment you have:
 - a listed each risk
 - b identified the consequences of each risk
 - c estimated the probability of each risk occurring
 - d made a judgement about any action that is justified taking into account the consequences and probability of each risk.
- 7 You must provide evidence that you have worked with two of these groups of people to identify possible actions for managing risk:
 - a team members or colleagues
 - b suppliers or service partners
 - c supervisors, team leaders or managers.
- 8 Your evidence must show that you have carried out risk assessments that have caused you to:
 - a take action to manage the risk
 - b decide that the level of risk is tolerable and take no action.

Level: 3

Credit value: 6

NDAQ number: D/601/1522

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Recognise the signs that a query or problem is about to produce a complaint
- 2 Deal with a complaint effectively
- 3 Understand how to process customer service complaints

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 C7 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 the signs that a query or problem is about to produce a complaint**Assessment Criteria**

The learner can:

- 1.1 identify signs that a customer is becoming dissatisfied with the customer service of their organisation
- 1.2 take action to change the situation so that the query or problem does not result in a complaint
- 1.3 take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made

Outcome 2: Deal with a complaint effectively**Assessment Criteria**

The learner can:

- 2.1 ensure that they have a clear understanding of the nature and details of the complaint
- 2.2 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- 2.3 identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation
- 2.4 assess the risks to their organisation of choosing each option
- 2.5 report the findings of their investigation to their customer and offer their chosen solution
- 2.6 escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so
- 2.7 give feedback to other colleagues involved which will help them avoid future complaints
- 2.8 keep clear records of the way the complaint has been handled to avoid later misunderstandings

Outcome 3: Understand how to process customer service complaints**Assessment Criteria**

The learner can:

- 3.1 explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- 3.2 explain why dealing with complaints is an inevitable part of delivering customer service
- 3.3 describe organisational procedures for dealing with complaints
- 3.4 explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation

- 3.5 explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported
- 3.6 explain when to escalate a complaint by involving more senior members of the organisation or an independent third party
- 3.7 explain the cost and regulatory implications of admitting liability for an error made by their organisation
- 3.8 identify how to spot and interpret signals that their customer may be considering making a complaint
- 3.9 describe techniques for handling conflict
- 3.10 explain the importance of dealing with a complaint promptly
- 3.11 explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- 3.12 explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 processed complaints that are seen by your organisation as:
 - a justified
 - b unjustified.
- 5 You must provide evidence of processing customer service complaints:
 - 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 need to provide evidence that you have dealt with customers who:
 - a have different needs and expectations
 - b appear angry or confused
 - c behave unusually.
- 7 You must provide evidence that you have processed complaints and taken full account of:
 - a organisational procedures
 - b sector or industry codes of practice
 - c legislation.

Level: 3

Credit value: 8

NDAQ number: D/601/1553

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Improve customer service by working with others
- 2 Monitor their own performance when improving customer service
- 3 Monitor team performance when improving customer service
- 4 Understand how to work with others to improve customer service

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 Unit D8 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: Improve customer service by working with others**Assessment Criteria**

The learner can:

- 1.1 contribute constructive ideas for improving customer service
- 1.2 identify what they have to do to improve customer service and confirm this with others
- 1.3 agree with others what they have to do to improve customer service
- 1.4 co-operate with others to improve customer service
- 1.5 keep their commitments made to others
- 1.6 make others aware of anything that may affect plans to improve customer service

Outcome 2: Monitor their own performance when improving customer service**Assessment Criteria**

The learner can:

- 2.1 discuss with others how what they do affects customer service performance
- 2.2 identify how the way they work with others contributes towards improving customer service

Outcome 3: Monitor team performance when improving customer service**Assessment Criteria**

The learner can:

- 3.1 discuss with others how teamwork affects customer service performance
- 3.2 work with others to collect information on team customer service performance
- 3.3 identify with others how customer service teamwork could be improved
- 3.4 take action with others to improve customer service performance

Outcome 4: Understand how to work with others to improve customer service**Assessment Criteria**

The learner can:

- 4.1 describe who else is involved either directly or indirectly in the delivery of customer service
- 4.2 describe the roles and responsibilities of others in their organisation
- 4.3 describe the roles of others outside their organisation who have an impact on their services or products

- 4.4 evaluate what the goals or targets of their organisation are in relation to customer service and how these are set
- 4.5 evaluate how their organisation identifies improvements in 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 agreeing customer service roles and responsibilities which are:
 - a part of your own role
 - b part of other people's roles.
- 5 You must provide evidence that you have worked with two of these groups of people:
 - a team members or colleagues
 - b suppliers or service partners
 - c supervisors, team leaders or managers.
- 6 Your evidence must show that your work with others involves communication by two of these methods as expected within your job role:
 - a face to face
 - b in writing
 - c by telephone
 - d using text messages
 - e by e-mail
 - f using the internet (including social networking)
 - g using an intranet.

Level: 3

Credit value: 7

NDAQ number: H/601/1554

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Plan improvements in customer service based on customer feedback
- 2 Implement changes in customer service
- 3 Review changes to promote continuous improvement
- 4 Understand how to promote continuous improvement

Guided learning hours

It is recommended that 47 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 D9 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 improvements in customer service based on customer feedback**Assessment Criteria**

The learner can:

- 1.1 gather feedback from customers that will help to identify opportunities for customer service improvement
- 1.2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- 1.3 discuss with others the potential effects of any proposed changes for their customers and their organisation
- 1.4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

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

The learner can:

- 2.1 organise the implementation of authorised changes
- 2.2 implement the changes following organisational guidelines
- 2.3 inform people inside and outside their organisation who need to know of the changes being made and the reasons for them
- 2.4 monitor early reactions to changes and make appropriate fine-tuning adjustments

Outcome 3: Review changes to promote continuous improvement**Assessment Criteria**

The learner can:

- 3.1 collect and record feedback on the effects of changes
- 3.2 analyse and interpret feedback and share their findings on the effects of changes with others
- 3.3 summarise the advantages and disadvantages of the changes
- 3.4 use their analysis and interpretation of changes to identify opportunities for further improvement
- 3.5 present these opportunities to somebody with sufficient authority to make them happen

Outcome 4: Understand how to promote continuous improvement

Assessment Criteria

The learner can:

- 4.1 review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- 4.2 explain how customer experience is influenced by the way service is delivered
- 4.3 explain how to collect, analyse and present customer feedback
- 4.4 explain how to make a business case to others to bring about change in the products or services they 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.
- 5 You must show that your proposals for improvements:
 - a are based on planned and analysed customer feedback
 - b take into account all relevant regulations
 - c take into account the costs and benefits to the organisation.
- 6 You may carry out this work alone or with colleagues. However, you must provide evidence that you have taken an active role in:
 - a collecting and analysing feedback
 - b proposing initiatives for change
 - c implementing the change
 - d evaluating and reviewing the change.
- 7 Your evidence must clearly show the part you have played in each step of the continuous improvement process.
- 8 The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.

Unit 315

Develop your own and others' customer service skills

Level: 3

Credit value: 8

NDAQ number: K/601/1555

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Develop their own customer service skills
- 2 Plan the coaching of others in customer service
- 3 Coach others in customer service
- 4 Understand how to develop their own and others' customer service skills

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 Unit D10 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: Develop their own customer service skills**Assessment Criteria**

The learner can:

- 1.1 agree with a manager or mentor the specific customer service skills they need in their customer service role
- 1.2 agree the actions they need to take to improve their customer service skills
- 1.3 draw up a personal development plan based on their agreed actions to improve their customer service skills
- 1.4 carry out their personal development activities and review their progress
- 1.5 obtain feedback from their manager or mentor about their customer service performance and update their personal development plan

Outcome 2: Plan the coaching of others in customer service**Assessment Criteria**

The learner can:

- 2.1 identify and agree with colleagues specific customer service skills and knowledge those colleagues need in their customer service role
- 2.2 identify opportunities for colleagues to take actions to develop their customer service skills
- 2.3 plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills

Outcome 3: Coach others in customer service**Assessment Criteria**

The learner can:

- 3.1 coach colleagues to develop specific and agreed customer service skills
- 3.2 give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- 3.3 regularly check the progress of colleagues and modify their coaching as appropriate
- 3.4 give regular feedback to colleagues about the progress they are making
- 3.5 explain clearly to colleagues how ongoing support will be provided

Outcome 4: Understand how to develop their own and others' customer service skills

Assessment Criteria

The learner can:

- 4.1 describe organisational systems and procedures for developing their own and others' personal performance in customer service
- 4.2 explain how their behaviour impacts on others
- 4.3 explain how to review effectively their personal strengths and development needs
- 4.4 describe how to put together a personal development plan for themselves or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
- 4.5 explain how to obtain useful and constructive personal feedback from others
- 4.6 describe how to respond positively to personal feedback
- 4.7 describe how to put together a coaching plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service and their job role
- 4.8 explain how to give useful and constructive personal feedback to others
- 4.9 describe how to help others to respond positively to personal feedback

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 personal development plan may be based on existing customer service skills and development activities that already take place in your organisation or new activities that you have to devise.
- 5 You must have constructed your personal development plan taking account of information about the knowledge and skills relevant to your:
 - a customer service role
 - b own preferred method of learning
 - c workload
 - d opportunities for learning on the job
 - e opportunities for learning off the job.
- 6 An 'appropriate person' must be one or more of the following:
 - a your manager
 - b your supervisor or team leader
 - c a colleague detailed to help you learn

- d your assessor
 - e your mentor
 - f someone from your training or personnel department.
- 7 Feedback about your customer service performance must involve your line manager or supervisor and your evidence must show this.
- 8 Your evidence of coaching may relate either to a single colleague or several colleagues who may be:
- a new to the organisation or department
 - b new to the job, procedure or system
 - c experienced but seeking to refresh or improve their customer service skills.

Level: 3

Credit value: 7

NDAQ number: H/601/1568

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Plan and organise the work of a team
- 2 Provide support for team members
- 3 Review performance of team members
- 4 Understand how to lead a team to improve customer service

Guided learning hours

It is recommended that 47 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 D11 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 organise the work of a team**Assessment Criteria**

The learner can:

- 1.1 treat team members with respect at all times
- 1.2 agree with team members their role in delivering effective customer service
- 1.3 involve team members in planning and organising their customer service work
- 1.4 allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- 1.5 motivate team members to work together to raise their customer service performance

Outcome 2: Provide support for team members**Assessment Criteria**

The learner can:

- 2.1 check that team members understand what they have to do to improve their work with customers and why that is important
- 2.2 check with team members what support they feel they may need throughout this process
- 2.3 provide team members with support and direction when they need help
- 2.4 encourage team members to work together to improve customer service

Outcome 3: Review performance of team members**Assessment Criteria**

The learner can:

- 3.1 provide sensitive feedback to team members about their customer service performance
- 3.2 encourage team members to discuss their customer service performance
- 3.3 discuss sensitively with team members action they need to take to continue to improve their customer service performance

Outcome 4: Understand how to lead a team to improve customer service**Assessment Criteria**

The learner can:

- 4.1 describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation
- 4.2 explain how team and individual performance can affect the achievement of organisational objectives

- 4.3 explain the implications of failure to improve customer service for their team members and their organisation
- 4.4 describe how to plan work activities
- 4.5 explain how to present plans to others to gain understanding and commitment
- 4.6 explain how to facilitate meetings to encourage frank and open discussion
- 4.7 explain how to involve and motivate staff to encourage teamwork
- 4.8 describe how to recognise and deal sensitively with issues of underperformance

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 you have line management or supervisory responsibility for the team members used in your evidence.
- 5 You must show that you have taken into account the organisational constraints of:
 - a time
 - b human resources
 - c physical resources
 - d financial resources.
- 6 You must also show that you have taken into account the team or individual constraints of:
 - a existing workloads
 - b individual capabilities and sensitivities
 - c initiatives and objectives currently being undertaken by the organisation
 - d influences operating on the team from outside.
- 7 Your evidence must provide evidence that you have taken time with each team member to:
 - a plan and organise their work
 - b provide support and guidance
 - c give and seek feedback on performance.
- 8 The feedback you provide to team members may be
 - a formal or informal
 - b verbal or in writing.

Unit 317

Gather, analyse and interpret customer feedback

Level: 3

Credit value: 10

NDAQ number: H/601/1571

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Plan to gather customer feedback
- 2 Gather customer feedback
- 3 Analyse and interpret customer feedback
- 4 Understand how to gather, analyse and interpret customer feedback

Guided learning hours

It is recommended that 67 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 D12 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 to gather customer feedback**Assessment Criteria**

The learner can:

- 1.1 identify the options available for collecting customer service feedback
- 1.2 evaluate the costs and benefits of each option for collecting customer feedback
- 1.3 select one or more methods for collecting customer feedback
- 1.4 plan in detail what information they will collect from customers
- 1.5 ensure the information they collect all has a customer service focus
- 1.6 plan in detail how they will collect information from customers using their chosen method

Outcome 2: Gather customer feedback**Assessment Criteria**

The learner can:

- 2.1 use their chosen method and detailed plan to collect customer feedback
- 2.2 monitor the collection of customer feedback to ensure it is falling within their chosen sampling frame
- 2.3 monitor the collection of customer feedback to ensure it focuses on customer service issues
- 2.4 record the data they collect in a way that makes analysis and interpretation easy
- 2.5 respect their customers' rights to confidentiality if the customers do not want their comments to be identified

Outcome 3: Analyse and interpret customer feedback**Assessment Criteria**

The learner can:

- 3.1 collate data collected from customers in order to identify patterns and trends in customer service
- 3.2 perform appropriate calculations to summarise patterns and trends in the data
- 3.3 present their analysis in a form that is easily understood
- 3.4 link their analysis with their knowledge of their organisation's service offer and customer service processes in order to interpret the meaning of the data
- 3.5 make recommendations for changes in their organisation's service offer or customer service processes in response to the views of their customers
- 3.6 identify ways in which customer feedback can be used to inform customers and develop the customer relationship

Outcome 4: Understand how to gather, analyse and interpret customer feedback

Assessment Criteria

The learner can:

- 4.1 explain random sampling techniques and how to evaluate bias in non-random samples
- 4.2 identify principles of questionnaire design
- 4.3 identify principles of effective interviewing
- 4.4 explain how to calculate the cost of a customer survey
- 4.5 describe techniques for monitoring data collection
- 4.6 explain how to use appropriate software to record and analyse customer feedback
- 4.7 describe methods of displaying and presenting data in a way that is easy to understand
- 4.8 explain statistical techniques for summarising trends and patterns
- 4.9 describe organisational procedures for recommending changes in the service offer or customer service procedures
- 4.10 compare the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 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 collected feedback from customers:
 - a using informal methods such as conversation and observation of customer reactions
 - b using two different formal methods such as questionnaire, telephone or interview surveys.
- 5 Your evidence must include feedback that you have collected:
 - a using a method you have devised
 - b following established organisational procedures.
- 6 You must provide evidence that you have displayed the results of your data collection:
 - a in tabulated form
 - b in graphical or pictorial form.

Unit 318

Monitor the quality of customer service transactions

Level: 3

Credit value: 7

NDAQ number: T/601/1574

Unit aim

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

Learning outcomes

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

The learner will:

- 1 Prepare to monitor the quality of customer service transactions
- 2 Monitor the quality of customer service transactions
- 3 Give feedback on the quality of customer service transactions
- 4 Understand how to monitor the quality of customer service transactions

Guided learning hours

It is recommended that 47 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 D13 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 monitor the quality of customer service transactions**Assessment Criteria**

The learner can:

- 1.1 identify the criteria against which quality of customer service transactions will be monitored
- 1.2 agree a sampling frame for monitoring customer service transactions
- 1.3 follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed
- 1.4 identify ratings and scales against which quality of customer service transactions can be measured
- 1.5 ensure that they are totally familiar with the customer service procedures for transactions they are monitoring

Outcome 2: Monitor the quality of customer service transactions**Assessment Criteria**

The learner can:

- 2.1 carry out spot checks on or observations of the quality of customer service transactions
- 2.2 carry out planned and routine checks on or observations of the quality of customer service transactions
- 2.3 observe or listen to a colleague dealing with a customer service transaction
- 2.4 record their observations of a colleague's performance against agreed quality criteria
- 2.5 make judgements about their colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale
- 2.6 analyse and summarise their observations to identify patterns and trends in their colleague's performance

Outcome 3: Give feedback on the quality of customer service transactions**Assessment Criteria**

The learner can:

- 3.1 engage with their colleague in preparation for giving feedback on the quality of their customer service delivery
- 3.2 provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well
- 3.3 give feedback to their colleague regarding features of their customer service delivery that would benefit from development

- 3.4 propose actions for coaching or training of a colleague in areas that would improve their customer service delivery
- 3.5 maintain records of customer service quality monitoring and action plans for improvements

Outcome 4: Understand how to monitor the quality of customer service transactions

Assessment Criteria

The learner can:

- 4.1 review the criteria against which the quality of customer service delivery is judged in the their organisation
- 4.2 describe ways to construct a representative sample of customer service transactions in order to monitor quality
- 4.3 explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service
- 4.4 explain how to define ratings and scales against which customer service transactions can be judged
- 4.5 explain their organisation's procedures and guidelines for customer service delivery
- 4.6 describe ways to record details of customer service transactions they have observed in order to provide feedback
- 4.7 describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery
- 4.8 explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement
- 4.9 describe sources of information about coaching and training options to improve customer service delivery
- 4.10 explain the importance of keeping detailed records of coaching and training relating to customer service delivery

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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.

There are no additional evidence requirements other than those expressed within the Unit.

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.

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 GOLA assessments.

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

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

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

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

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

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business_unit@cityandguilds.com

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

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