



City & Guilds Level 2 Diploma for Customer Service Practitioners (2794-02)

Version 1.3 (September 2024)

Qualification Handbook

Qualification at a glance

Subject area	Marketing and Sales
City & Guilds number	2794
Age group approved	Learners aged 16 or above
Entry requirements	City & Guilds does not set entry requirements for this qualification.
Assessment	Portfolio of evidence, multiple-choice examination
Grading	Pass/Fail
Approvals	Full approval
Support materials	Smartscreen
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds qualification number	Regulatory reference number	GLH	TQT
City & Guilds Level 2 Diploma for Customer Service Practitioners	2794-02	603/2394/2	201	380

Version and date	Change detail	Section
v1.1 October 2017	Added Mapping document of qualification to standard.	Appendix 1
v1.2 October 2017	Corrected numbering of assessment criteria in unit 205 learning outcome 1	Units
v1.3 September 2024	Handbook reviewed and updated to new template	Throughout

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1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who is the qualification for?	The qualification is for anyone who is involved in any customer focused role in any industry
What does the qualification cover?	This qualification covers: <ul style="list-style-type: none">• Developing self to achieve targets and goals• Recognition of regulations and legislation within own organisation• Principles of business• Contributing to a customer focused experience• Providing customer service• Managing customer expectations
What opportunities for progression are there?	On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications: <ul style="list-style-type: none">• The Level 3 qualification which will support the Customer Service Specialist Apprenticeship standard.• Level 3 Diploma in Customer Service (5530-03)• Qualifications in other work-related areas (for example Contact Centres, Sales, Social Media, Team Leading, Administration, Retail and other related areas.)
Who did we develop the qualification with?	The qualification was developed in consultation with employers, training providers and colleges. The requirements of the Customer Service Practitioner standard were also considered to ensure this qualification would support the candidates working on this Apprenticeship standard
Is it part of an apprenticeship framework or initiative?	This qualification is not part of the Customer Service Practitioner Apprenticeship end point assessment but is a stand-alone qualification that can support those on the Apprenticeship. This qualification is also for those not on an Apprenticeship who wish to work towards a Customer Service qualification.

Structure

To achieve the City & Guilds Level 2 Diploma for Customer Service Practitioners, learners must achieve:

City & Guilds unit number	Unit title	GLH
Mandatory units:		
Learners must achieve all six mandatory units.		
2794-201	Developing self to achieve targets and goals	30
2794-202	Recognition of regulations and legislation within own organisation	30
2794-203	Principles of business	27
2794-204	Contribute to a customer focused experience	38
2794-205	Provide customer service	28
2794-206	Manage customer expectations	28
Optional units:		
Learners must achieve one unit from the optional units.		
2794-207	Working in a sales environment	25
2794-208	Working in an administrative environment	27
2794-209	Working in a contact centre environment	25
2794-210	Customer service principles	20
2794-211	Working in a retail environment	22
2794-212	Social media in a work environment	30
2794-213	Fundamentals of marketing	26

Total Qualification Time (TQT)

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT comprises of the following two elements:

- 1) the number of hours that an awarding organisation has assigned to a qualification for guided learning
- 2) an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Title and level	GLH	TQT
City & Guilds Level 2 Diploma for Customer Service Practitioners	201	380

2 Centre requirements

Approval

Full approval

To offer this qualification, new centres will need to gain both centre and qualification approval. Please refer to the document **Centre Approval Process: Quality Assurance Standards** for further information.

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

Resource requirements

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the area(s) for which they are delivering training and/or have experience of providing training (this knowledge must be to the same level as the training being delivered)
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

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 quality assurance, and that it takes account of any national or legislative developments.

Quality assurance

Approved centres must have effective quality assurance systems to ensure optimum delivery and assessment of qualifications. Quality assurance includes initial centre approval, qualification approval and the centre's own internal procedures for monitoring quality. Centres are responsible for internal quality assurance and City & Guilds is responsible for external quality assurance. All external quality assurance processes reflect the minimum requirements for verified and moderated assessments, as detailed in the Centre Assessment Standards Scrutiny (CASS), section H2 of Ofqual's General Conditions. For more information on both CASS and City and Guilds Quality Assurance processes visit: the [What is CASS?](#) and [Quality Assurance Standards](#) documents on the City & Guilds website.

Standards and rigorous quality assurance are maintained by the use of:

- Internal quality assurance
- City & Guilds external quality assurance.

In order to carry out the quality assurance role, Internal Quality Assurers must

- have appropriate teaching and vocational knowledge and expertise
- have experience in quality management/internal quality assurance

- hold or be working towards an appropriate teaching/training/assessing qualification
- be familiar with the occupation and technical content covered within the qualification.

External quality assurance for the qualification will be provided by City & Guilds EQA process. EQAs are appointed by City & Guilds to approve centres, and to monitor the assessment and internal quality assurance carried out by centres. External quality assurance is carried out to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

The role of the EQA is to:

- provide advice and support to centre staff
- ensure the quality and consistency of assessments and marking/grading within and between centres by the use of systematic sampling
- provide feedback to centres and to City & Guilds.

Learner entry requirements

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is approved for learners aged 16 or above.

Access arrangements and reasonable adjustments

City & Guilds has considered the design of this qualification and its assessments in order to best support accessibility and inclusion for all learners. We understand however that individuals have diverse learning needs and may require reasonable adjustments to fully participate. Reasonable adjustments, such as additional time or alternative formats, may be provided to accommodate learners with disabilities and support fair access to assessment.

Access arrangements are adjustments that allow candidates with disabilities, special educational needs, and temporary injuries to access the assessment and demonstrate their skills and knowledge without changing the demands of the assessment. These arrangements must be made before assessment takes place.

Equality legislation requires City & Guilds to make reasonable adjustments where a disabled person would be at a substantial disadvantage in undertaking an assessment.

It is the responsibility of the centre to ensure at the start of a programme of learning that candidates will be able to access the requirements of the qualification.

Please refer to the Joint Council for Qualifications (JCQ) access arrangements and reasonable adjustments and access arrangements - when and how applications need to be made to City & Guilds. For more information documents are available on the City & Guilds website.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs
- support and guidance they may need when working towards their qualification
- any units they have already completed or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification, their responsibilities as a learner and the responsibilities of the centre. This information can be recorded on a learning contract.

Inclusion and diversity

City & Guilds is committed to improving inclusion and diversity within the way we work and how we deliver our purpose which is to help people and organisations develop the skills they need for growth.

More information and guidance to support centres in supporting inclusion and diversity through the delivery of City & Guilds qualifications can be found here:

[Inclusion and diversity | City & Guilds \(cityandguilds.com\)](https://www.cityandguilds.com/uk/qualifications/inclusion-and-diversity)

Sustainability

City & Guilds are committed to net zero. Our ambition is to reduce our carbon emissions by at least 50% before 2030 and develop environmentally responsible operations to achieve net zero by 2040 or sooner if we can. City & Guilds is committed to supporting qualifications that support our customers to consider sustainability and their environmental footprint.

More information and guidance to support centres in developing sustainable practices through the delivery of City & Guilds qualifications can be found here:

[Our Pathway to Net Zero | City & Guilds \(cityandguilds.com\)](https://www.cityandguilds.com/uk/qualifications/our-pathway-to-net-zero)

Centres should consider their own carbon footprint when delivering this qualification and consider reasonable and practical ways of delivering this qualification with sustainability in mind. This could include:

- reviewing purchasing and procurement processes (such as buying in bulk to reduce the amount of travel time and energy, considering and investing in the use of components that can be reused, instead of the use of disposable or single use consumables)

- reusing components wherever possible
- waste procedures (ensuring that waste is minimised, recycling of components is in place wherever possible)
- minimising water use and considering options for reuse/salvage as part of plumbing activities wherever possible.

Support materials

The following resources are available for this qualification:

Description	How to access
Learning assistant app	www.cityandguilds.com
Sample assessment	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence for each mandatory unit.

and

- successfully completed one online multiple choice test for optional unit 210 or a portfolio of evidence for one unit from 207-209 or 211-213

Assessment types			
Unit	Title	Assessment method	Where to obtain assessment materials
2794-201	Developing self to achieve targets and goals	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-202	Recognition of regulations and legislation within own organisation	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-203	Principles of business	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-204	Contribute to a customer focused experience	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-205	Provide customer service	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com

Assessment types

Unit	Title	Assessment method	Where to obtain assessment materials
2794-206	Manage customer expectations	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-207	Working in a sales environment	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-208	Working in an administrative environment	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-209	Working in a contact centre environment	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-210	Customer service principles	Multiple choice test	www.cityandguilds.com
2794-211	Working in a retail environment	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-212	Social media in a work environment	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com
2794-213	Fundamentals of marketing	Portfolio of evidence Centre-devised, internally set and marked assessment	www.cityandguilds.com

Assessment strategy

Units are assessed through a portfolio of evidence. All evidence in the portfolio for the skills learning outcomes must be generated in the workplace or a realistic working environment.

City & Guilds has written the following assessments to use for optional unit 210 within this qualification:

- live assignments that can be downloaded from the City & Guilds website
- sample assignments that can be downloaded from the City & Guilds website.

Portfolio of evidence

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

City & Guilds endorses several ePortfolio systems, including our own, **Learning Assistant**, an easy-to-use and secure online tool to support and evidence candidates' progress towards achieving qualifications. 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. Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external quality assurers, before they are used by candidates and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.

Evidence sources

A portfolio of evidence will typically include several pieces of evidence – it must contain sufficient evidence to demonstrate the knowledge and skills required for each appropriate unit.

Evidence sources may include:

- training logbooks
- centre-produced worksheets and activities
- annotated photographs
- video clips (maximum duration in total = 10 minutes)
- workplace documentation/records, for example job cards/job sheets, equipment check/maintenance/service records, parts order records.

This is not a definitive list; other evidence sources are permitted.

The evidence provided must be valid and attributable to the candidate; the portfolio of evidence must contain a statement from the centre confirming this.

Evidence **must not** include:

- any methods of self-assessment
- any employer contributions should focus on direct observation of evidence (for example witness statements) of competence rather than opinions.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

RPL is allowed and is not sector-specific.

Test specifications

The way the knowledge is covered by each test is laid out in the table below:

Graded: Pass/Fail

Pass mark: to pass this examination, learners must score a minimum of 18 out of 25

Test:	Duration: 60 minutes		
Unit	Outcome	Number of questions	Percentage %
2794-210	1 Understand the impact of external factors to the organisation	5	20
	2 Understand the service offer and the customer service supply chain	5	20
	3 Understand customer loyalty	8	32
	4 Understand methods of product and/or service promotion	7	28
	Total	25	100%

5 Units

Structure of the units

These units each have the following:

- City & Guilds reference number
- title
- level
- guided learning hours (GLH)
- unit aim
- learning outcomes, which comprise a number of assessment criteria
- range statements
- supporting information

Guidance for delivery of the units

This qualification comprises a number of **units**. A unit describes what is expected of a competent person in particular aspects of their job.

Each **unit** is divided into **learning outcomes** which describe in further detail the skills and knowledge that a candidate should possess.

Each **learning outcome** has a set of **assessment criteria** (performance and knowledge and understanding) which specify the desired criteria that must be satisfied before an individual can be said to have performed to the agreed standard.

Range statements define the breadth or scope of a learning outcome and its assessment criteria by setting out the various circumstances in which they are to be applied.

Supporting information provides guidance of the evidence requirement for the unit and specific guidance on delivery and range statements. Centres are advised to review this information carefully before delivering the unit.

Unit 201

Developing self to achieve targets and goals

Level:	2
GLH:	30
Aim:	<p>This unit aims to develop the knowledge and understanding required by a learner to take ownership of personal performance and development. Upon completion of this unit, learners will be able to identify own role and responsibilities, target and goals. They will also recognise how workloads can be managed and prioritised. Learners will understand how to obtain feedback on own performance and how self-assessment techniques are used in setting development needs within an agreed personal development, which they will monitor, review and update as required.</p> <p>This unit must be started by the learner at the beginning of the qualification and should not be signed off until the qualification is complete.</p>

Learning outcome

The learner will:

LO1 Understand own role and responsibilities including targets and goals

Assessment criteria

The learner can:

AC1.1 describe own role and responsibilities

AC1.2 identify agreed **targets and goals** in own role

AC1.3 explain how own actions impact on others in own organisation

AC1.4 describe how to achieve agreed **targets and goals**

Range

Targets and goals:

- Personal
- Organisational

Learning outcome

The learner will:

LO2 Organise own workload/activity to meet deadlines

Assessment criteria

The learner can:

AC2.1 agree goals and deadlines for completing tasks with an **appropriate person**

AC2.2 prioritise and plan the completion of tasks to meet delivery deadlines

AC2.3 use **tools and techniques** to monitor progress of tasks

AC2.4 **adjust priorities** as required

AC2.5 meet agreed deadlines

Range

Appropriate person eg:

- Manager
- Supervisor or team leader
- A colleague assigned to help you learn
- Mentor
- Human resources manager
- Training provider representative

Tools and techniques eg:

- Scheduling
- Diary
- To do list
- Gantt Chart
- Review by management (e.g. 1-to-1)
- Risk log
- Milestones

Adjust priorities e.g:

- During a busy time in own job
 - During a quiet time in own job
 - When systems or resources fail
 - When colleagues or departments require support
 - To meet urgent/ additional work/ revised deadlines
-

Learning outcome

The learner will:

LO3 Obtain and act on personal feedback from others to develop and/or maintain personal service skills and knowledge

Assessment criteria

The learner can:

AC3.1 describe examples of **feedback**

AC3.2 identify suitable ways of obtaining **feedback** on own service skills and knowledge.

AC3.3 obtain useful and constructive **feedback** on own service skills and knowledge.

AC3.4 respond positively to **feedback**.

AC3.5 use **feedback** to take responsibility for developing and maintaining own personal customer service skills and knowledge.

Range

Feedback eg:

- Comments cards
- Informal communication – phone calls and conversations
- Feedback /suggestion boxes
- Thank you letters/cards

Formal eg:

- Call monitoring/coaching/observation
 - 1-to-1/appraisals/ Personal Development Review(PDR)
 - 360° feedback
 - Surveys/feedback forms
 - Questionnaires
 - Social media
 - Emails
 - Mystery shopper
 - Follow-up calls
-

Learning outcome

The learner will:

LO4 Prepare a personal development plan to achieve personal goals and development needs

Assessment criteria

The learner can:

AC4.1 identify self-assessment techniques, applying the most appropriate for own role.

AC4.2 identify own strengths and weaknesses in relation to own role.

AC4.3 prepare a personal development plan with an appropriate person.

AC4.4 identify Specific, Measurable, Achievable, Realistic and Time-bound (SMART) objectives.

AC4.5 apply agreed SMART objectives.

AC4.6 review the effectiveness of own personal development plan and update it accordingly.

Range

Self-assessment techniques eg:

- Strengths Weaknesses Opportunities Threats (SWOT)
- Reflection activities/log
- Self-evaluation

Appropriate person eg:

- Manager
- Supervisor or team leader
- A colleague assigned to help you learn
- Mentor, human resources manager
- Training provider representative

Unit 201

Developing self to achieve targets and goals

Supporting information

Evidence requirements

It is expected that the evidence includes multiple examples of workplace evidence such as:

- Job description
- Witness statements
- Written and/or digital communication
- Coaching/ observation
- Mystery shopper report
- Call recording
- Service level agreement (or similar)
- Organisation customer service policy
- Resource and planning record/scheduling
- Key Performance Indicators records
- Project planning tools e.g. Gantt charts
- Workplace diaries, calendars
- Customer feedback, survey, questionnaire etc
- 1-to-1/ Performance review
- SMART/SMARTER goals
- 360° feedback
- SWOT analysis or similar
- Personal Development Plan (PDP)
- Continuous Professional Development logs

Unit guidance

This unit must be started by the learner at the beginning of the qualification and should not be signed off until the qualification is complete.

Outcome 1: It is expected that the evidence for this outcome could include reflective account, professional discussion and/or written/oral questions identifying own personal and organisational roles and responsibilities.

Outcome 2: It is expected that for this outcome there will be evidence of personal planning and prioritising according to own organisation and role, with agreed goals and deadlines (formal and/or informal) appropriate to the immediacy and importance of the task.

The learner will also require evidence of responding in a professional manner to challenges and changes and adjusted priorities accordingly.

It is expected there will be evidence of the tools and techniques used that are available in own organisation to monitor the progress of tasks, whether formal and/or informal. There would also be evidence of how activities were monitored and re-prioritised to meet agreed deadlines.

Outcome 3: It is expected that evidence for this outcome should include a variety of methods of obtaining informal and/or formal feedback from others (internal and/or external) on own customer service skills and knowledge. There should also be clear evidence of positive and negative (if applicable) feedback and that it is positively accepted and used to maintain and develop own customer service skills and knowledge.

Outcome 4: It is expected that evidence for this outcome will include application of a technique of self- assessment, for example SWOT analysis or similar and that this evidence has been reviewed and updated over a period of time and used in the preparation of regular PDPs. There must also be clear evidence of the effectiveness of personal development plans reviewed and updated accordingly.

Unit 202

Recognition of regulations and legislation within own organisation

Level:	2
GLH:	30
Aim:	This unit aims to develop the learner's knowledge and understanding of the use of regulations and legislation. On completion of the unit the learner will be able to identify and understand the use of a variety of regulations and legislation that apply to own organisation, in particular those relating to Health and Safety, Data Protection, social and digital media and use of systems, equipment and technology.

Learning outcome

The learner will:

LO1 Understand the use of regulations and legislation

Assessment criteria

The learner can:

AC1.1 identify the different **regulations and legislation** that affect own organisation

AC1.2 explain how relevant **regulations and legislation** affect own organisation and its customer service provision

AC1.3 identify own **responsibility** in applying regulations and legislation when delivering customer service

Range

Regulations and legislation eg:

- Customer charter
- Service level agreement
- Refund policy
- Financial Services Act
- Consumer Rights Act
- Ethical standards
- Code of practice

Responsibility relating to:

- Customers (internal and external)
- Own organisation

- Use of social and digital media
 - Use of systems equipment and technology
-

Learning outcome

The learner will:

LO2 Understand the Health and Safety at Work Act

Assessment criteria

The learner can:

AC2.1 state the **importance** of applying the Health and Safety at Work Act within own organisation

AC2.2 state the responsibilities of employers under the Health and Safety at Work Act

AC2.3 state the responsibilities of employees under the Health and Safety at Work Act

Range

Importance for:

- Self
 - Customers (internal and external)
 - Own organisation
-

Learning outcome

The learner will:

LO3 Understand the importance of confidentiality of information.

Assessment criteria

The learner can:

AC3.1 state the **importance** of keeping information confidential within an organisation

AC3.2 identify the **information** which needs to be kept and remain confidential within own organisation

AC3.3 state own responsibilities for keeping information confidential in own organisation

Range

Importance for:

- Self
 - Customers
 - Organisation
-

Information relating to:

- Customers (internal and external)
 - Own organisation
-

Learning outcome

The learner will:

LO4 Understand what is meant by social and digital media and the guidelines for their use

Assessment criteria

The learner can:

AC4.1 identify examples of digital media platforms

AC4.2 describe the digital media policies that exist in own or other customer service organisations

AC4.3 describe the **guidelines** in a digital media policy that affect the use of social and digital media in the work environment

Range**Guidelines eg:**

- IT policy
 - Use of social and digital media
 - Roles and responsibilities
 - Limits of authority
 - Handling of customers
-

Learning outcome

The learner will:

LO5 Know how to use systems, equipment and/or technology to meet the needs of own customers following organisational requirements

Assessment criteria

The learner can:

AC5.1 identify the different systems, equipment and/or technology own organisation uses to effectively meet customer needs

AC5.2 describe how in own role, systems, equipment and/or technology are used to support customer needs

AC5.3 explain the use of the different systems, equipment and/or technology available in the organisation to meet **customer** needs effectively

Range

Customer:

- Internal
- External

Unit 202

Recognition of regulations and legislation within own organisation

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which includes signposting to some or all of the following:

- Examples of policies, procedures and guidelines used by own organisation
- Examples of Health and Safety policies, procedures and guidelines including those used by own organisation
- Staff handbook including Health and Safety guidance and own responsibilities
- Examples of data protection policies and guidelines including those used by own organisation
- Examples of codes of practice and/or ethical standards including those used by own organisation
- Examples of social and digital media policies and guidelines including those used by own organisation
- Examples of different systems, equipment and/or technology including those used by own organisation
- Formal organisation induction
- Task Manual
- In-house workbooks
- Recorded discussions with relevant member(s) of staff of organisation

This can also be covered in a presentation

Unit guidance

Outcome 1: It is expected there will be clear reflection and understanding of the appropriate legislation and regulations that affect the learner's organisation generally. It is also expected that there will be evidence showing how these affect own organisation's customer service provision. Clear referencing should be provided in the reflective account to the organisational documentation.

Outcome 2: It is expected there will be clear reflection and understanding of the relevant health and safety legislation and regulations that affect the learner's organisation. It is also expected that there will be evidence showing how these affect own organisation's customer service provision. Clear referencing should be provided in the reflective account to the organisational documentation.

Outcome 3: It is expected there will be clear reflection and understanding of the relevant data protection legislation and regulations that affect the learner's organisation. It is also expected that there will be evidence showing how these affect own organisation's customer service provision. Clear referencing should be provided in the reflective account to the organisational documentation. We also require evidence of reflection on how these affect own

responsibilities and those of the organisation for keeping information confidential and why it is important certain information is kept and remains confidential.

Outcome 4: It is expected to see a clear understanding of what is meant by social and digital media, showing understanding of a variety of platforms and their use in the working environment. We expect research to cover aspects of social and digital media usage within customer service and policies supporting such usage. This must include the guidelines used in own or other organisation, whether formal or informal.

Outcome 5: Clear referencing should be provided in the reflective account to the documentation. We expect evidence of reflection on and a clear understanding of the types of systems, equipment and/or technology own organisation uses to effectively meet customer needs giving examples.

We also expect to see reflection on how these examples are used in own role to effectively support customer needs.

Unit 203

Principles of business

Level:	2
GLH:	27
Aim:	This unit aims to develop knowledge and understanding of the principles of business organisations. Upon completion of this unit the learner will have developed an understanding of different types of organisations. They will have an understanding of an organisation's core and brand values, including their own. Learners will explore organisational policies and procedures including those that affect the customer service role. This unit will also develop the learner's knowledge about types of measurement and evaluation tools available to monitor customer service levels within an organisation

Learning outcome

The learner will:

LO1 Understand own organisation and industry sectors

Assessment criteria

The learner can:

AC1.1 describe the differences between **industry sectors**

AC1.2 describe the purpose of own organisation business type and the industry sector it falls in

AC1.3 state the aims of own organisation in relation to its industry sector.

Range

Industry sector:

- Private:
 - Sole Trader
 - Partnership
 - Public Limited Company
 - Private Limited Company
 - Franchise
- Public:
 - Government Departments
 - Local Authorities

- Public corporations
 - Third Sector:
 - Not for profit
 - Registered Charities
 - Trusts
-

Learning outcome

The learner will:

LO2 Understand own organisation's core values and service culture and how they relate to each other

Assessment criteria

The learner can:

AC2.1 describe what is meant by **core values**.

AC2.2 explain own organisation's **core values**

AC2.3 describe what is meant by **service culture**

AC2.4 explain own organisation's **service culture**

AC2.5 explain how own organisation's **core values** relate to its **service culture**.

Range

Core values eg:

- Mission statement
- Business goals/strategy
- Guiding principles
- Ethical

Service culture eg:

- Shared beliefs
 - Rules
 - Behaviours
 - Policies and procedures eg refund policy
 - Service level agreement
-

Learning outcome

The learner will:

LO3 Understand the purpose of a 'brand promise'

Assessment criteria

The learner can:

AC3.1 describe what is meant by the term '**brand promise**'.

AC3.2 state own organisation's 'brand promise'

AC3.3 state what own organisation's brand promise means to self, organisation and customer

AC3.4 describe why it is important for a customer to be able to identify a 'brand'

AC3.5 describe what can impact on effectiveness of the brand.

Range

Brand Promise:

- Purpose
 - Positioning
 - Strategy
 - Staff
 - Customer experience
 - Differentiation
-

Learning outcome

The learner will:

LO4 Understand the purpose of organisational policies and procedures including those that affect own customer service role

Assessment criteria

The learner can:

AC4.1 describe the purpose of an organisational policy.

AC4.2 list **organisational policies** and procedures that affect own customer service role.

AC4.3 state the purpose of different organisational policies and how these affect own customer service role.

AC4.4 state what should be included in a complaints process/procedure.

Range

Organisational policies eg:

- Complaints
 - Refund
 - Social and Digital Media
 - Service offer/Service Level Agreement
 - Roles and responsibilities showing limits of authority
-

Learning outcome

The learner will:

LO5 Understand types of measurement and evaluation tools available to monitor customer service levels

Assessment criteria

The learner can:

AC5.1 identify the types of measurement and evaluation tools used to monitor customer service level

AC5.2 describe the measures and evaluation tools used to monitor customer service levels.

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which includes signposting to some or all of the following:

- In-house workbooks
- Task manual
- Work products eg policies and procedures, own and other organisations' brand promise, own organisation's core values and service culture, complaint procedures including own organisation's
- Formal organisation induction
- Recorded discussion with for example senior member(s) of organisation or owner
- Examples of different types of measurement and evaluation tools used within a variety of organisations
- Or a combination of the above

This can also be covered in a presentation.

Unit guidance

Outcome 1: It is expected that the evidence for this outcome includes personal research into the three business sectors and difference between each sector. It is required that there is an inclusion of evidence showing understanding of the sector own organisation falls in and its operating purpose.

Outcome 2: It is likely for large organisations there will be a written and visible core values and service culture, while for medium to small organisations the core values and service culture may be less visible and projected by a senior member of the organisation e.g. director, chief executive, owner. We expect examples of own organisation's core values and service culture to be evidenced confirming own understanding.

Outcome 3: It is likely for large organisations for example there will be a written and visible brand promise, while for medium to small organisations the brand promise may be less visible and projected by a senior member of the organisation e.g. director, chief executive, owner. We expect examples of own organisation's brand promise to be evidenced confirming own understanding.

Outcome 4: It is expected to include examples of own organisation's internal policies and procedures and the purpose that they serve in relation to customer service to be evidenced confirming understanding. We expect research to cover common aspects of complaint procedures and those of your own organisation whether formal or informal.

Outcome 5: Clear referencing should be provided in the reflective account to the documentation. We expect to see evidence of reflection on and a clear understanding of the

types of measures and evaluation tools used to monitor customer service levels including examples of those used in the organisation.

Unit 204

Contribute to a customer focused experience

Level:	2
GLH:	38
Aim:	This unit aims to develop the learner's knowledge and understanding of different types of customers. They will also be able to identify who their own customers are and those of the organisation. The learner will understand what is meant by a customer focused experience and the importance of customer trust. The learner will also know how to treat customers individually in a way that upholds organisational core values. This unit also aims to ensure the learner can demonstrate they can frequently and consistently communicate and work with others in the interest of helping customers efficiently. It also aims to develop team working skills and a recognition of good practice in customer service, with the learner presenting recommendations for improvements to others.

Learning outcome

The learner will:

LO1 Understand the characteristics of organisation's customer base

Assessment criteria

The learner can:

AC1.1 identify who own customers are

AC1.2 identify own organisation's customers

AC1.3 describe **types of customers**

AC1.4 explain the difference between internal and external customers in the context of own organisation.

AC1.5 identify own organisation's internal and external customers

Range

Types of customers eg:

- Challenging
- Regular
- Impatient
- Dissatisfied

- Undecided
 - Those with
 - Special requirements
 - Language barriers
 - Cultural differences
-

Learning outcome

The learner will:

LO2 Understand how to create a customer focused experience

Assessment criteria

The learner can:

AC2.1 explain what is meant by a customer focused experience

AC2.2 explain how to establish the facts to create a customer focused experience

AC2.3 explain how an understanding of the facts can be used to create a customer focused experience

AC2.4 explain the **importance of building customer trust**

AC2.5 explain how to start to build trust with own customers

Range

Importance of building customer trust to:

- Self
 - Customer
 - Organisation
-

Learning outcome

The learner will:

LO3 Treat all customers as individuals

Assessment criteria

The learner can:

AC3.1 treat all customers equally ensuring compliance with **legal requirements**.

AC3.2 provide a personalised service experience, recognising and responding to **individual needs**.

AC3.3 apply consistently own organisation's core values and service culture when dealing with customers.

Range

Legal requirements:

- The Equality Act
- The Data Protection Act
- Health & Safety at Work Act

Individual needs eg:

- special requirements
- language barrier
- cultural differences

Core values eg:

- Mission statement
- Business goals/strategy
- Guiding principles
- Ethical

Service culture:

- Shared beliefs, rules, behaviours
 - Policies and procedures eg refund policy, service level agreement
-

Learning outcome

The learner will:

LO4 Be able to communicate and work with others in the interests of helping customers

Assessment criteria

The learner can:

AC4.1 describe the **interpersonal skills** required to work effectively as part of a **team**

AC4.2 demonstrate **interpersonal skills** while working as part of a **team**

AC4.3 work and cooperate with others in a positive and productive manner

AC4.4 communicate information in a timely and reliable manner to **team** members to support them in meeting customer needs

Range

Interpersonal skills:

- Trust
- Communication skills – verbal, non-verbal and listening
- Negotiation, persuasion and influencing skills
- Problem solving

Team eg:

- Appropriate colleagues
 - Manager/Supervisor/team leader
 - Project teams
 - Other relevant teams/departments
-

Learning outcome

The learner will:

LO5 Be able to share personal learning and present recommendations to support good practice.

Assessment criteria

The learner can:

AC5.1 identify examples/case studies of good practice in customer service delivery

AC5.2 state methods of sharing good practice with **others**

AC5.3 share personal learning and information with **others** to support good customer service practice

AC5.4 present your ideas and recommendations for improvements in customer service to **others**

Range

Others eg:

- Appropriate colleagues
- Manager/Supervisor/team leader
- Project teams
- Other relevant teams/departments

Unit 204

Contribute to a customer focused experience

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which includes signposting to some or all of the following:

- Marketing materials
- Training materials (internal)
- Written and/or digital communication
- Customer records
- Customer surveys/feedback/retention records
- Recorded discussions with relevant member(s) of staff of organisation
- Referral/ handover documentation
- Witness statements
- Coaching/observation
- Mystery shopper report
- Call recording
- 360° feedback
- 1-to-1s/performance reviews
- Learning log
- Minutes from meetings
- Staff meeting minutes
- Customer feedback/ commendation

This can also be covered in a presentation.

Unit guidance

Outcome 1: It is expected the learner will research their own organisation's customer base and provide evidence, which will vary across organisations. Some organisations will have marketing materials and customer analysis which will assist here but others will not. Learners will submit a reflective account on their customers and this evidence can be backed with examples from the above including discussions with relevant members of staff where possible.

Outcome 2: It is expected the learner will research the subject area and provide a reflective statement detailing the research. The evidence is not necessarily about their own organisation but should there be evidence or reflection which relates to their own organisation, this must be provided. This evidence can be backed with examples including a discussion with relevant members of staff where possible. The discussions could also take place with staff from the training organisation. The learner will require to provide evidence on how they build trust in their own organisation with customers and provide evidence of this.

Outcome 3: the learner will require to present evidence of having been observed demonstrating the following:

- recognising and responding to individual needs to provide a personalised customer service experience

- behaving in a way that upholds the core values and service culture of own organisation ensuring all customers are treated equally.

The observations can be carried out for example by:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Outcome 4: We expect to see evidence of adapted behaviour and the communication approach used to work effectively and cooperatively as part of a team to meet team and customer's needs.

Outcome 5: We expect to see recognition of own learning in daily dealings with customers that can support and possibly improve good customer service practice. It is expected to see evidence that these examples have been shared with others. We expect to see evidence of own ideas for improving customer service practice, with reasons, to the appropriate colleagues.

Unit 205

Provide customer service

Level:	2
GLH:	28
Aim:	Upon completion of this unit, learners will have knowledge of own organisation's products, services, policies and/or procedures. Learners will be able to make initial customer contact identifying the different needs and priorities of different customers responding to and managing expectations.

Learning outcome

The learner will:

LO1 Understand the product(s) and/or service(s) of own organisation

Assessment criteria

The learner can:

AC1.1 state own organisation's product(s) and/or service(s).

AC1.2 describe the difference between providing:

- a. a product
- b. a service

AC1.3 explain the difference between the features and benefits of the product(s) and/or service(s) provided by own organisation

AC1.4 describe how own knowledge of organisation's product(s) and/or service(s) is **updated** and **maintained**

Range

Updated:

- Internal sources
- External sources

Maintained eg:

- Continuous Professional Development (CPD)
- Record of attendance
- Certificates
- Or individual to own organisation

Learning outcome

The learner will:

LO2 Demonstrate a professional image, following the organisation's code of conduct and dress code.

Assessment criteria

The learner can:

AC2.1 present organisation's standards of a tidy and **professional image**.

AC2.2 follow the organisation's **code of conduct** and dress code.

AC2.3 demonstrate an approachable and welcoming **attitude** and/or tone, when dealing with customers

a. Face to face

b. Non face to face

AC2.4 demonstrate a positive **attitude** with customers when dealing with various **situations**.

AC2.5 use professional and positive language consistently when dealing with different customer **situations**.

Range

Presentation, attitude and professional image:

- Personal presentation/dress/uniform
- Presentation of work area
- Tone of voice/language used
- Body language

Code of conduct eg:

- Social standards
- Rules and responsibilities
- Ethical practice

Situations eg:

- Difficult and/or dissatisfied customers
- Customers with special requirements
- System and/or procedural issues

Learning outcome

The learner will:

LO3 Be able to follow own organisation's procedures in ensuring good customer service

Assessment criteria

The learner can:

- AC3.1 identify policies and procedures relevant to customer service
- AC3.2 recognise the importance of good customer service to customers and in turn own organisation
- AC3.3 demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers
- AC3.4 refer customers to **others** as required, passing on necessary information
- AC3.5 follow up with customers and **others** as required to ensure **conclusion**
- AC3.6 carry out own organisational procedures when checking customer satisfaction
-

Range

Others eg:

- Other department(s)
- Colleagues
- Management
- Supervisor/Team leader
- Specialist

Conclusion:

Which balances the needs of the organisation and where possible the customer

Learning outcome

The learner will:

- LO4 Be able to make initial customer contact while establishing and responding to needs and expectations

Assessment criteria

The learner can:

- AC4.1 make initial customer contact and use appropriate communication skills in a professional manner following own organisational procedures
- AC4.2 establish **customer** needs from wants
- AC4.3 use appropriate **techniques** to establish the customer needs and expectations
- AC4.4 adapt techniques when confirming own and **customers'** understanding of needs and expectations
- AC4.5 deal with **customers** confidently, remaining positive and professional when circumstances are challenging
- AC4.6 adapt **techniques** to meet and manage customer needs and expectations in a professional and timely manner
- AC4.7 use appropriate **techniques** to maintain or enhance the customer experience
-

Range

Customers eg:

- General
 - Impatient
 - Dissatisfied
-

- Undecided
- Those with
 - Special requirements
 - Language barriers

Customers:

- Internal
- External

Techniques:

- Attitude
- Behaviour
- Tone
- Body language eg
 - Body movements
 - Facial expressions
 - Hand gestures
 - Posture

Learning outcome

The learner will:

LO5 Understand the different needs and priorities of own customers and how to manage expectations.

Assessment criteria

The learner can:

AC5.1 state the purpose of customer service

AC5.2 identify the needs of own customers

AC5.3 identify the priorities of own customers

AC5.4 describe the specific needs of **different customers**, including those protected under current equality law

AC5.5 state what is meant by customer expectations

AC5.6 explain when and how to **adapt** own service approach to meet the needs and expectations of customers

AC5.7 state how the standard of customer service offered **affects the success** of own organisation

Range

Different customers eg:

- Challenging
- Regular
- Impatient
- Dissatisfied
- Undecided

Those with

- Special requirements
- Language barriers

Adapt:

- Tone
- Body language
- Attitude

Affects the success:

- Positive
- Negative

Unit 205

Provide customer service

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which includes signposting to some or all of the following:

Examples of features and benefits of products and/or services of own organisation

- Examples of methods used to keep up-to-date on own organisation's products and/or services
- Learning log
- Personal Development Plan
- Recorded discussion with relevant member(s) of staff of organisation
- On-programme workbooks
- Witness statements
- Written and/or digital communication
- In-house workbooks
- Task Manual
- Coaching/ observation
- Mystery shopper report
- Call recording
- Customer feedback/commendation
- Service level agreement (or similar)
- Organisation customer service policy
- Or a combination of the above

This can also be covered in a presentation.

Unit guidance

Outcome 1: it is expected a list of examples of own organisation's products and/or services is produced, including a reflection of and evidence of updating and maintaining own knowledge of the organisation's products and/or services.

The learner is also expected to reflect on and show a clear understanding of why it is important to update own knowledge on own organisation's products and/or services.

It is also expected that examples will be provided by the learner on how they have updated and maintained own knowledge of organisation's products and/or services. This should include what the organisation offers in updates and training and what can be done through self-study/learning to keep up-to-date.

There should also be evidence of understanding the technical knowledge required to advise customers on the products and/or services offered by the organisation, the features and benefits of them and the difference between providing a product and providing a service.

Outcome 2: the learner will require to present evidence of having been observed demonstrating the following:

- a professional image in line with the organisational dress code and code of conduct

- demonstrate personal pride in the job through appropriate dress and positive and confident language.
- a consistent positive attitude and welcoming approach when dealing with customers
- maintaining a consistent professional and positive language during customer interactions
- recognising and responding to individual needs to provide a personalised customer service experience
- behaving in a way that upholds the core values and service culture of own organisation ensuring all customers are treated equally.

The observations can be carried out for example by:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Outcomes 3 and 4: We expect that the evidence will be a documented observation which will indicate the learner can make initial customer contact, establishing and responding to needs and expectations while following own organisation's procedures in ensuring good customer service.

The observation can also supported by any of the following:

- Recorded discussion with relevant member(s) of staff of organisation
- Presentations
- Witness statements (from customers and/or appropriate colleagues)
- Written and/or digital communication
- Coaching/ observation evidence
- Mystery shopper report
- Own organisation's policies and procedures
- Service level agreement (or similar)
- Organisational customer service policy
- Products and/or training manuals

Or a combination of the above

The observations can be carried out by e.g.:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Outcome 5: It is expected that the evidence for this outcome includes personal research into the purpose of customer service showing how the standard of customer service offered affects the success of own organisation. The learner will also require to provide evidence of research into the needs, priorities and expectations of own customers considering also the specific needs of different customers, including those protected under current equality law. They will also require to provide evidence of understanding when and how to adapt own service approach to meet the needs and expectations of customers

Unit 206

Manage customer expectations

Level:	2
GLH:	28
Aim:	This unit aims to develop the learner's knowledge and understanding of the needs, wants, priorities and expectations of own customers and how they manage them. They will also be able to demonstrate the ability to make initial customer contact and handle customers positively and professionally through to conclusion, offering options which are mutually beneficial to the customer and organisation. This unit also aims to develop knowledge, understanding and skills when dealing with customer conflict and challenges. Upon completion of this unit the learner will have developed an understanding of different types of conflicts and of challenging customers and will be able to deal with them appropriately. They will have an understanding of the use of sign-posting or resolution to meet customer's needs and manage their expectations, including maintaining accurate records of customer issues and progress to resolution.

Learning outcome

The learner will:

- LO1 Be able to use communication and interpersonal skills in working towards meeting customer needs and expectations

Assessment criteria

The learner can:

- AC1.1 show willingness and ability to engage in a positive manner using relevant **interpersonal skills**
- AC1.2 take ownership from beginning to end, building and maintaining a relationship/rapport
- AC1.3 show ability to work towards meeting needs and expectations
- AC1.4 remain positive and professional when customer needs and/or expectations cannot be met
- AC1.5 demonstrate ability to recognise when to summarise
- AC1.6 use **summarising language and/or reinforcement techniques** to confirm understanding
- AC1.7 use correct, appropriate and clear **communication skills** that reflect own organisation's brand
- AC1.8 display knowledge of own organisational products and/or services

Range

Interpersonal skills:

- Open and closed questioning relevant to the situation
- Active listening when communicating
- Body language when interacting with customers eg body movements, facial expressions, hand gestures and posture

Summarising language and/or reinforcement techniques eg:

- Paraphrasing
- Reordering main ideas
- Condensing of ideas in logical sequence
- Confirming understanding

Communication skills eg:

- Written
 - Verbal
 - Non-verbal (eg body language/sign language)
-

Learning outcome

The learner will:

LO2 Demonstrate a confident, patient and calm manner while understanding the customer's point of view

Assessment criteria

The learner can:

AC2.1 maintain calmness, empathy and patience when dealing with **challenging situations**

AC2.2 use **listening and/or questioning skills** to understand the situation from the customer's point of view

AC2.3 remain sensitive to, and interested in, the customers' concerns

Range

Challenging situations: eg

- difficult and/or dissatisfied customers
- customers with special requirements
- system and/or procedural issues
- operational issues

Listening skills:

- active listening

Questioning skills (oral and/or written):

- open
 - closed
 - probing
 - leading
-

Learning outcome

The learner will:

- LO3 Use influencing skills to identify customer needs and offer options which are mutually beneficial to the customer and own organisation

Assessment criteria

The learner can:

AC3.1 use **questioning and listening skills** to identify customer needs

AC3.2 offer product(s) and/or service(s) that meet the identified needs of the customer and own organisation

AC3.3 communicate how the product(s) and/or service(s) offered meet customer needs

AC3.4 **handle customer objections** in a positive and professional manner ensuring a mutual outcome is agreed

Range

Questioning skills (oral and/or written):

- open
- closed
- probing
- leading

Listening skills:

- Active listening

Handle customer objections:

- Remain calm, professional and in control
 - Adapt communication to suit customer
 - Ask for assistance if required
-

Learning outcome

The learner will:

- LO4 Follow own organisation's policies and/or procedures to meet customer's needs and manage expectations

Assessment criteria

The learner can:

AC4.1 explain in a logical manner **next steps and/or customer's options**

AC4.2 provide sign-posting and/or resolution in line with **organisational policies and/or procedures**

AC4.3 **keep customers informed** of progress while resolving issues

AC4.4 maintain accurate **records of customer issues** and progress to resolution

Range

Next steps and/or customer options: eg

- Escalation to a senior member of staff
- Written complaint
- Regulators

Organisational policies and/or procedures: eg

- Complaints
- Refund
- Social and Digital Media
- Service offer/Service Level Agreement
- Roles and responsibilities showing limits of authority

Keeping customers informed: eg:

- Face to face
- Phone
- Written and/or digital communication

Records of customer issues: eg

- Recording of calls
- Written and/or digital communication
- Complaints log

Unit 206

Manage customer expectations

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which includes signposting to some or all of the following:

- Witness statements
- Written and/or digital communication
- Coaching/ observation
- Mystery shopper report
- Recorded discussion with relevant member(s) of staff of organisation
- Call recording
- Customer records
- Customer feedback, survey, retention records
- Referral/ handover documentation
- Case summaries
- Complaints log

Or a combination of the above

This can also be covered in a presentation.

Unit guidance

Simulations should not be used in this unit.

Outcome 1: The learner will require to present evidence of having been observed demonstrating the following:

- willingness and ability to engage in a positive manner using relevant interpersonal skills, taking ownership from beginning to end, building and maintaining a relationship/rapport
- ability to work towards meeting needs and expectations
- remaining positive and professional when customer needs and/or expectations cannot be met
- ability to recognise when to summarise, using summarising language and/or reinforcement techniques to confirm understanding
- use of correct, appropriate and clear communication skills that reflect own organisation's brand, while displaying a knowledge of own organisational products and/or services
- willingness to work with others and share knowledge, ideas and good practice

The observations can be carried out for example by:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Outcome 2: It is expected that there will be evidence of handling a variety of challenging customer situations where active listening skills, effective questioning skills are demonstrated appropriately. The learner will provide evidence that in such situations patience, calmness and empathy are maintained, whilst meeting customers' needs and expectations. Interest in and sensitivity to the customers' concerns should also be evidenced. We expect to see evidence from learners that customers have clearly understood the options available and /or the onward progress of their query

Outcome 3: It is expected that there will be evidence of a practical demonstration of effective techniques to identify customer needs. This will enable the offer of appropriate products and/or services to the benefit of both the customer and organisation. It is also expected to see practical demonstration of clear communication of the offer of products and/or service options, including clear explanations of how agreed outcomes were achieved.

There must be evidence of overcoming customer objections in a positive and professional manner showing recognition of the customer point of view. Positive and professional behaviour is expected to be seen, including the use of appropriate language (oral and/or written) while taking ownership of handling objections within own limit of authority. It is also expected that clear understanding of organisational policies and/or procedures is demonstrated throughout.

Outcome 4: It is expected that there will be evidence that customers have clearly understood the options available and /or the onward progress of their query. We expect to see evidence across a variety of customer conflicts and/or challenges that resolution or onward referral for resolution is managed in line with organisational policies and procedures.

The presented evidence should also show ownership of the situation and of keeping customers informed as promised in line with organisational guidelines, even if no further update is available. We also expect to also see evidence of accurate records of customers' issues and progress. Records can be formal or informal according to the organization but may be confidential so witness testimony will be accepted in such situation

Unit 207

Working in a sales environment

Level:	2
GLH:	25
Aim:	This unit aims to develop the learners underpinning knowledge and understanding of sales processes in order to effectively carry out the role of selling to customers. Upon completion of this unit, learners will not only have the background knowledge and some of the psychology of selling they will also be able to apply the fundamentals to their own organisation's selling cycle. The learner will have gained knowledge of techniques to overcome customer objections and be able to effectively close a sale.

Learning outcome

The learner will:

LO1 Understand the sales environment and sales cycle of own organisation

Assessment criteria

The learner can:

AC1.1 describe own organisation's **sales environment**

AC1.2 explain own organisation's sales cycle

AC1.3 state the **legal and regulatory requirements** of own role in relation to sales

AC1.4 state own organisation's procedures for raising legal and/or regulatory concerns

Range

Sales environment:

- The sales culture of own organisation, shared beliefs
- Rules eg
 - commission, on target earning
- Behaviours eg
 - verbal and non-verbal language, dress code
- Policies and procedures eg
 - refund policy, service level agreement, complaints

Legal and regulatory requirements:

- The Equality Act
- The Data Protection Act

- Health & Safety at Work Act
 - Other legal and regulatory requirements relevant to own organisation eg
 - Consumer Rights Act
 - Financial Services Act
-

Learning outcome

The learner will:

LO2 Understand sales techniques, including those of up-selling and cross-selling

Assessment criteria

The learner can:

AC2.1 explain the difference between proactive and reactive selling

AC2.2 describe how techniques such as cross-selling and up-selling can be applied in sales

AC2.3 describe the advantages of own organisation's product(s) and/or service(s) against competitors

AC2.4 describe types of **listening** and **questioning techniques** that can be used in sales

AC2.5 describe how to interpret **non-verbal behaviour** in sales

AC2.6 describe how to perform a trial close to establish whether the customer is ready to purchase

Range

Questioning techniques (oral and/or written):

- Open
- Closed
- Probing
- Leading

Listening skills:

- Active listening

Non-verbal behaviour:

- Attitude
 - Body language
-

Learning outcome

The learner will:

LO3 Understand how to process and follow-up on sales orders within own organisation

Assessment criteria

The learner can:

- AC3.1 describe own organisation's processes for ordering product(s) and/or service(s)
- AC3.2 describe the different payment types accepted
- AC3.3 describe the **service standards** expected for sales order completion
- AC3.4 explain where to go for support with a sales order
- AC3.5 describe procedures for dealing with customers' **after sales requirements**
- AC3.6 explain how to balance the **after sales requirements** of the customer with those of own organisation
- AC3.7 explain the limits of own authority and who to refer to if a customer's **after sales requirement** cannot be resolved
-

Range

Service standards: eg

- Response time
- Accessibility
- Delivery times

After sales requirements:

- Activities that would normally take place after a sale eg
 - Queries
 - Complaints
 - Refunds
-

Learning outcome

The learner will:

LO4 Undertake sales activities following own organisation's sales cycle

Assessment criteria

The learner can:

- AC4.1 work to a sales plan identifying potential customers
- AC4.2 identify customer requirements through the use of listening and questioning skills
- AC4.3 confirm customer requirements by summarising buying needs and interests identifying product(s) and/or service(s) which match their needs
- AC4.4 communicate unique selling points to the customer identifying any cross-selling and/or up-selling opportunities
- AC4.5 interpret buying signals and act on them to progress the sale
- AC4.6 clarify objections and reassure the customer, confirming objections have been overcome
- AC4.7 perform a trial close to establish whether or not further objections exist
- AC4.8 gain a commitment to close the sale and complete formalities following own organisation's procedures
-

Unit 207 Working in a sales environment

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence will include personal research resulting in a reflective statement which will be supported by any of the following:

- Examples of features and benefits of products and/or services of own organisation
- Recorded discussion with relevant member(s) of staff of organisation
- Example of organisation's sales cycle
- Witness statements
- Written and/or digital communication
- In-house workbooks
- Coaching/ observation evidence
- Mystery shop report
- Service level agreement (or similar)
- Sales targets and outcomes/achievements
- Organisational customer service policy
- Or a combination of the above

This can also be covered in a presentation

Unit guidance

Simulation should not be used in this unit.

Outcome 1: It is expected a description of own organisation's sales environment and sales process is included, as well as legal and regulatory requirements of own sales role.

The learner is also expected to reflect on, and show, a clear understanding of own organisation's procedures on whom within the organisation they would raise regulatory and/or legal concerns.

Outcome 2: It is expected the learner will provide evidence of understanding, and of having used effective questioning techniques with own customers. This will have enabled the learner to offer appropriate product(s) and/or service(s) to the benefit of both the customer and own organisation. The learner will also have carried out research on the product(s) and/or service(s) of the competition and compare them to those of own organisation.

There must be evidence of how the learner would perform a "Trail Close" to establish if their customer is ready to purchase from them. Evidence of positive and professional behaviour is expected to be produced, including a reflection on what may or may not be said to a customer following own organisation's guidelines. They will have also covered in their reflective account proactive and reactive selling, cross-selling and up-selling.

Outcome 3: It is expected the learner will reflect on own organisation's ordering and payment processes. There will be evidence of own organisation's service standards. The learner should

also be able to identify limits of authority and where support can be obtained. They will also, show a full understanding of the sales process and be able to explain the after sales process giving examples.

Outcome 4: The learner will be required to present evidence of having been observed demonstrating the following:

- Overcoming customer objections
- Performing a trial close
- Identifying cross-selling and up-selling opportunities
- Closing the sale
- Completing formalities

The observations can be carried out by for example:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Level:	2
GLH:	27
Aim:	This unit aims to develop knowledge and understanding of skills required in an administrative environment. The learner will be able to input, process and present documents and/or information following organisational guidelines. They will also be able to store and retrieve information taking into account legal guidelines and conventions. The learner will also understand the organisation and administration of different types of meetings and the use of mail services in a business context.

Learning outcome

The learner will:

LO1 Input, process and present documents and/or information

Assessment criteria

The learner can:

AC1.1 select, prepare and check information ready for processing

AC1.2 **format** and **edit information**

AC1.3 produce documents and/or information **in accordance with** own organisation's procedure and/or guidelines

AC1.4 check documents and/or information for **accuracy** making corrections as necessary

AC1.5 select and use appropriate **methods to present** information

AC1.6 use relevant **distribution channels**

Range

Format: eg

- structure (eg lines, paragraphs, pages, page breaks)
- layout (eg alignment, margins, headers and footers, page numbers, orientation)
- business conventions/ house styles

Edit information: eg

- select
- insert
- delete

- cut
- copy
- paste
- drag and drop
- find and replace
- labelling
- colour and resolution
- size

In accordance with: eg

- quality standards
- deadlines /timelines
- data protection
- copyright
- intellectual property
- version control
- confidentiality
- legal and ethical requirements

Accuracy: eg

- spell check, grammar check, punctuation
- language, tone
- accuracy of figures
- labelling and size of images
- quality and placing of images
- line, paragraph and page breaks fall appropriately
- formatting is consistent
- use of headings and subheadings aid clarity

Presentation methods: will vary according to the software and document/information

Distribution channels: eg:

- email
- social media
- intranet
- website
- shared drives
- hyperlink
- internal/ external
- postal
- courier
- by hand

Learning outcome

The learner will:

LO2 Be able to store and retrieve information

Assessment criteria

The learner can:

AC2.1 describe own organisation's **systems** and **procedures** for storing and retrieving information

AC2.2 identify **legal** and organisational requirements for information security and retention

AC2.3 create **filing systems** to facilitate information identification for storage and/or retrieval

AC2.4 store and/or retrieve the required information within the agreed timescale

AC2.5 describe what to do when **issues** arise when storing and/or retrieving information

AC2.6 follow organisational and/or **legal** guidelines and conventions for the storage and/or retrieval of data

Range

Systems: eg

- paper-based
- electronic

Procedures: eg:

Electronic:

- title or subject
- category or reference number
- dated
- author
- storage end date

Paper-based:

- alphabetical
- numerical
- chronological
- geographical
- by subject or category

Legal:

- Freedom of Information Act
- Data Protection Act

Filing systems: eg

- manual
- electronic

Issues: eg

- misfiling
- out of date filing
- hardware
- software
- taking into account own level of authority

Learning outcome

The learner will:

LO3 Understand the organisation and administration of meetings

Assessment criteria

The learner can:

AC3.1 describe different **types of meetings**

AC3.2 describe different ways of providing **administrative support** for meetings

AC3.3 explain the **steps** involved in organising meetings

Range

Types of meetings:

Formal

- Annual General Meeting
- Extraordinary General Meeting
- Committees
- Board meetings

Informal

- Departmental
- Team
- Briefings
- Progress

Administrative support:

Documentation required:

- Notice
- Agenda
- notes/minutes
- attendance register

Facilities

- Room booking
- Equipment
- Refreshment
- Stationery

Steps:

Understanding of the following:

- frequency, period of notice
- personnel involved, eg Chair, treasurer, secretary, minutes taker, attendees
- timescales
- distribution of documentation

- follow-up requirements
-

Learning outcome

The learner will:

LO4 Understand the use of mail services in a business context

Assessment criteria

The learner can:

AC4.1 describe the different types and purposes of **mail services** used by organisations

AC4.2 explain the factors to be considered when selecting mail services

AC4.3 explain the factors to be taken into account when choosing **postage methods**

AC4.4 state how efficient distribution of mail benefits the business

AC4.5 state why inaccuracies or delays can have a negative impact on the business

Range

Mail services:

- post office
- couriers
- international distributors
- internal circulation

Postage methods:

- First/second class
- special deliveries
- parcel post

Unit 208

Working in an administrative environment

Supporting information

Evidence requirements

Evidence requirements for outcomes 1 and 2: We expect that the evidence will be a documented observation which can be supported by any of the following:

- product evidence (note: data protection and confidentiality must be considered when presenting any product evidence)
- reflective account
- questioning
- recorded discussion with relevant member(s) of staff of organisation
- presentation(s)
- witness statements (from customers and/or appropriate colleagues)
- written and/or digital communication
- coaching/ observation evidence
- own organisation's policies and procedures

or a combination of the above

The observations can be carried out for example by:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Evidence requirements for outcomes 3 and 4: We expect that the evidence will be provided through a professional discussion.

Unit guidance

Simulation should not be used in this unit.

Unit 209

Working in a contact centre environment

Level:	2
GLH:	25
Aim:	This unit aims to develop the learner's knowledge, understanding and skills of dealing with telephone calls in a contact centre environment. Learners will also explore the legal, regulatory and ethical requirements including their impact on own role.

Learning outcome

The learner will:

LO1 Understand how to deal with telephone calls

Assessment criteria

The learner can:

AC1.1 describe the importance of having customer service aims, objectives and service offers in a contact centre

AC1.2 describe how to use the technology and software in own role

AC1.3 describe procedures for opening, closing and recording customer contact in own organisation

AC1.4 describe the need for an authentication/validation process

AC1.5 explain the importance of informing **customers** on what is happening and the **reasons for any constraints or limitations**

AC1.6 explain the importance of clear communication with the customer to ensure understanding of expectations and agreements

AC1.7 describe the **techniques** for establishing a rapport with **customers**

AC1.8 describe how to handle abusive calls following own organisational procedures

Range

Types of customers: eg

- Day to day
- Challenging
- Impatient
- Dissatisfied
- Undecided
- Language barriers
- Special requirements

Reasons for any constraints or limitations: eg

- Call recording
- Legislative/regulatory
- Limit of own authority
- Service offer

Techniques:

- Attitude
 - Behaviour
 - Tone
 - Empathy
 - Patience
-

Learning outcome

The learner will:

- LO2 Understand the legal, regulatory and ethical requirements relevant to the contact centre environment

Assessment criteria

The learner can:

- AC2.1 explain the **legal, regulatory and ethical requirements** relevant to own role
AC2.2 describe **internal and external sources of information** on **legal, regulatory and ethical requirements**
AC2.3 explain the importance of working within the **limits of own role**
AC2.4 explain the potential consequences of non-compliance with **legal, regulatory or ethical requirements**
-

Range**Legal requirements: eg**

- Data Protection Act
- Communications Act
- Consumer Credit Act
- Freedom of Information Act

Regulatory requirements: eg

- Telephone Preference Service
- Ofcom regulations
- Direct Marketing Association (DMA) Code of Practice
- Financial Conduct Authority (FCA)
- Information Commissioners Office (ICO)

Ethical requirements: eg

- Values
-

- Social
- Moral
- Respect
- Tolerance
- Code of conduct

Internal sources of information: eg

- Intranet
- Shared drives
- Human Resources department
- Management/Team leader
- Company handbook
- Training manuals/knowledge centre

External sources of information: eg

- Internet
- Agencies
- Library

Limits of own role:

- Responsibilities
- Authority

Learning outcome

The learner will:

LO3 Be able to handle calls with customers following own organisational, regulatory and legislative requirements

Assessment criteria

The learner can:

- AC3.1 prepare self and organise the information and data required to handle the call(s) considering **customers'** possible responses
- AC3.2 use telecommunications equipment
- AC3.3 introduce self and acknowledge the **customer**
- AC3.4 authenticate identity of the **customer**, handling any discrepancies
- AC3.5 ensure self and **customer** understand the purpose of the call
- AC3.6 take ownership by building and maintaining a **rapport** with the **customer**
- AC3.7 remain positive and professional when circumstances are challenging
- AC3.8 give clear and concise information confirming understanding of customers' needs
- AC3.9 manage the length of the conversation
- AC3.10 record information on the conversation including the outcome and any agreed **follow-up actions**

Range

Types of customers: eg

- Day to day
- Challenging
- Impatient
- Dissatisfied
- Undecided
- Language barriers
- Special requirements

Rapport: Make effective use of

- questioning skills relevant to the situation
 - Open
 - Closed
 - Probing
- active listening skills when communicating to collect as much information as possible
 - Use of encouraging phrases
 - Not interrupting
 - Questioning and paraphrasing
 - Summarising
- adapting own communication style to meet customers' needs

Follow-up actions: For example:

- Complete administration eg
 - Place order
 - Send letter
- Pass on information to others
- Refer to others
- Update customer records

Unit 209

Working in a contact centre environment

Supporting information

Evidence requirements

Evidence requirements for outcome 1 and 2: We expect that the evidence will be provided through a professional discussion which can be supported by any of the following:

- Organisational procedures for opening, closing and recording customer contact
- Authentication/validation process
- Organisational procedure for handling abusive calls
- Organisational customer service aims, objectives and service offers
- Policies and procedures relating to legal, regulatory and ethical requirements relevant to own role
- Examples of 'ethical approach'
- Call records
- Call lists/customer data
- Examples of personal and organisational targets
- Recorded discussion with relevant member(s) of staff of organisation

Evidence requirements for outcome 3: We expect that the evidence will be provided through practical observation(s) which can be supported by any of the following:

- Reviews/call monitoring
- Organisational procedures for opening, closing and recording customer contact
- Authentication/validation process
- Organisational procedure for handling abusive calls
- Organisational customer service aims, objectives and service offers
- Policies and procedures relating to legal, regulatory and ethical requirements relevant to own role
- Examples of 'ethical approach'
- Call records
- Call lists/customer data
- Examples of personal and organisational targets
- Recorded discussion with relevant member(s) of staff of organisation
- Witness statements
- On-programme workbooks
- Or a combination of the above

Unit guidance

Simulation should not be used in this unit.

The observations can be carried out for example by:

- manager
- supervisor
- expert witness
- coach/mentor
- training provider

However, these observations will require to be assessed by a qualified assessor.

Unit 210

Customer service principles

Level:	2
GLH:	20
Aim:	This unit aims to develop the knowledge and understanding required by a learner on the external factors that influence organisations. Upon completion of this unit, learners will also understand what is meant by the service offer and the supply chain. They will also understand the importance of the link between customer loyalty and organisational reputation. They will also develop an understanding of different promotional methods.

Learning outcome

The learner will:

LO1 Understand the impact of external factors to the organisation

Assessment criteria

The learner can:

AC1.1 state what is meant by a PESTLE analysis

AC1.2 describe the advantages of a PESTLE analysis

AC1.3 explain the importance of keeping up to date with competitors' activities

AC1.4 describe why **organisational change** is important

AC1.5 describe how **organisational change** should be introduced

Range

Importance of organisational change to:

- own organisation
- staff
- customer(s)

How organisational change should be introduced to:

- own organisation
- staff
- customer(s)

Learning outcome

The learner will:

LO2 Understand the service offer and the customer service supply chain

Assessment criteria

The learner can:

AC2.1 describe what is meant by a **service offer**

AC2.2 state the **value of a 'service offer'**

AC2.3 describe legislation, organisational policies and/or procedures that can limit or vary the service offer

AC2.4 describe what is meant by the customer service supply chain

AC2.5 explain the **importance of the customer service supply chain**

Range

Service offer:

- Service level agreement
- Customer charter

Value of a service offer to:

- Own organisation
- Staff
- Customer(s)

Importance of the customer service supply chain to:

- Own organisation
 - Staff
 - Customer(s)
-

Learning outcome

The learner will:

LO3 Understand customer loyalty

Assessment criteria

The learner can:

AC3.1 state how the achievement of the customer service offer can encourage customer loyalty

AC3.2 describe methods of attracting and retaining customers

AC3.3 describe the **advantages** of rewarding loyalty

AC3.4 describe the **disadvantages** of rewarding loyalty

AC3.5 describe methods of rewarding loyalty

AC3.6 describe the types of actions that customers are likely to perceive as adding value

AC3.7 explain why added value must be beneficial to both the customer and the organisation

Range

Advantages for:

- Customer(s)
- Own organisation
- Staff

Disadvantages for:

- Customer(s)
 - Own organisation
 - Staff
-

Learning outcome

The learner will:

LO4 Understand methods of product(s) and/or service(s) promotion

Assessment criteria

The learner can:

AC4.1 describe what is meant by a Unique Selling Point (USP)

AC4.2 describe what is meant by a Unique Service Offer (USO)

AC4.3 describe ways of promoting a product(s) and/or service(s) to increase customer awareness

AC4.4 state the strengths and weaknesses of promotional methods

AC4.5 state the **importance of 'first impressions'**

AC4.6 explain ways in which an organisation might improve its reputation

Range

Importance of first impressions on:

- Customer
 - Organisation
 - Staff
 - Reputation/Brand
-

Unit 210

Customer service principles

Supporting information

Unit guidance

1.1 PESTLE is:

P for Political

E for Economic

S for Social

T for Technological

L for Legal

E for Environmental

A PESTLE Analysis (sometimes referred to as PEST Analysis) is used as a tool by organisations to track the environment they operate in. It can also be used as a tool when organisations are planning to introduce a new service, product or project. It allows the organisation to look at what influences the way it operates and what the effects are of these influences. Some people will say that E stands for Ethics.

1.2: A PESTLE Analysis encourages an organisation to look at the external factors that will have a possible negative or positive effect on it. It can be helpful in the development of a business plan or strategy.

1.3: Keeping up to date with competitors' activities is vital as it allows organisations to assess what business opportunities there could be. It allows organisations to ensure they know what the competition is doing and that they are not losing to them in any way. It is also important that organisations check on the competitions' pricing and deals being offered.

1.4: Organisations need to change to keep their competitive edge and to ensure they are meeting the ever-changing needs of their customers. There is also a need for continuous improvement in organisations with a need to explore ideas for delivery in new and innovative ways.

1.5: Organisations need to identify the change needed and then ensure the introduction of the change is supported. Organisations need to ensure:

- staff product and service knowledge is updated
- the involvement of front line staff and supporting staff in continuous improvement
- a positive impression is given to customers about changes made by the organisation
- there is effective communication to avoid customers feeling threatened by changes.

An organisation needs to analyse the impact of any change through customer feedback obtained from different sources, e.g. observation, questionnaires, reduction in complaints etc and any change introduced needs to be monitored and reviewed. Any monitoring or review must consider the impact the change has had on customers, employees, the organisation and further improvements may be needed before a change can be deemed successful.

2.1 The service offer – also known as a customer charter – is an organisation's statement about the level of service they will offer eg some customer service offers will set out how the organisation will compensate a customer when customer service has not been delivered in

line with the service offer; or it will clearly state the timescales for responses. The service offer sets the basis on which the organisation will provide a service to its customers.

A service offer is often called a service level agreement or customer charter.

- Service Level Agreement (SLA) is a contract that exists between customers and their service provider, or between service providers. It records the common understanding about services, priorities, responsibilities, guarantee, and states the level of service to be delivered.
- Customer charter – is the organisation's statement about the level of service it will offer and like the service offer customer charters will eg set out how they will compensate a customer when customer service has not been delivered in line with the charter; or it will clearly state the timescales for responses.

2.2 The value of a service offer means customers will know this is what they can expect while organisations and staff know what they must deliver.

2.3 The key legislation relating to consumer law is:

- Consumer Rights Act
- Consumer Protection from Unfair Trading Regulations
- Consumer Protection Act
- Consumer Credit Act
- Data Protection Act

Organisational policies and procedures that affect the service offer will vary according to the organisation and the services and/or products it offers.

2.4 The customer service supply chain dictates who the people are in the organisation that contribute to the delivery of customer service and this, in a larger organisation may be like a family tree showing people and departments or different parts of the business that have connections to one another. In a smaller organisation one person may have to take on many of the roles that are looked after by specialist departments in larger organisations.

2.5 It is important to understand the roles of the people involved in the supply chain and who to contact in different situations. Internally understanding who's who in the supply chain means staff know who to contact for advice and support, not just to ensure the work flows efficiently but that customers can be dealt with quickly and professionally.

3.1 Good customer service is:

- ensuring customer needs are met
- forming a relationship with customers
- ensuring customers leave happy and return
- ensuring customers pass on positive feedback to others.

If the service customers receive is consistently good, loyalty will be built. If there is a good background of achieving customer satisfaction, customer loyalty may exist but even when things go wrong, organisations can recover from a negative situation with an individual customer by working towards a solution. Repeat business is influenced by a customer's on-going perception of the service they receive. A customer's loyalty and long-term relationship rely on being comfortable with the service that they receive.

3.2 To attract customers organisations need to:

- know the market and potential customers
- be seen either in person, online or through social media
- be competitive

- promote the USP/USO if applicable

To retain customers organisations need to:

- listen to the customers
- establish and meet needs
- keep up to date with advances in products and services offered
- remain competitive
- observe competitor activity
- form a relationship with the customers
- use social media.

3.3 It is beneficial for an organisation to have loyal customers as it tends to be cheaper and easier to retain business with an existing satisfied customer than it is to find a new customer. It can differentiate the organisation from the competitor and also make the customer feel appreciated. It can also allow the organisation to obtain information on its customers and their purchasing habits. For staff, it can be a way of motivating customers to make a purchase.

3.4 The disadvantages of rewarding loyalty are that there are now so many loyalty programmes that customers can feel overwhelmed by the number of programmes and so not feel attracted by them. They may not be sustainable in their initial form and require changing as time goes on resulting in reductions in the rewards offered. Staff may have to carry out additional, time consuming activities to record the purchase to allow the reward.

3.5 Customer loyalty can be rewarded by making special customer service arrangements and offers for repeat customers e.g. points programme, loyalty scheme and special offers.

3.6 Customers may perceive the following as offering added value depending on circumstances:

- expert advice from helpful and knowledgeable staff
- a professional, consistent service
- a service offer which is maintained and applied
- swift service and delivery
- willingness to assist when problems arise

3.7 Offering added value to customers can be advantageous but automatically offering added value to win or retain a customer is not possible as any added value offered must be cost effective to the organisation.

4.1 A Unique Selling Point/Proposition (USP) makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines. A USP defines an organisation's competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing, influencing the customer's choice of product(s) and/or service(s).

A USP defines an organisation's competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing, influencing the customer's choice of product(s) and/or service(s).

4.2 A Unique Service Offer (USO) makes a service different or better from its competitor(s) eg 24-hour availability. A USO is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers conduct business with organisations and use their product(s) and/or service(s). Customers buy benefits and solutions and the candidate should be familiar with the technique of selling features and benefits and

should know how these compare with those of competitors. USPs and USOs are used to differentiate what one organisation provides by way of product(s) and/or service(s) from another.

A USO is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers choose to conduct business with organisations.

4.3 Promotional methods can be websites, social media, networking/discussion sites, emails, leaflets, telephone calling, demonstrations, mailshots, promotional videos, newspaper (national and local) advertisements, television advertisements, local/national radio advertisements. There may be others not noted here.

4.4 It is important to compare the factors that influence organisations to select a range of promotional methods by identifying their strengths and weaknesses in relation to e.g. cost, market penetration, method of communication.

4.5 The customer service deliverer's own personal presentation, approach and attitude will influence the customer's initial perception of the service delivered. If the customer expects to see staff in uniform who have a friendly approach and a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears to not care. A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you do not get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances, e.g. being under pressure through lack of time or during busy periods. Being aggressive for example may cause an otherwise calm person to mirror that behaviour and become aggressive too.

An organisation's digital media presence also influences the first impression so ensuring negative comments are immediately addressed is important and any website should look professional, be user friendly and be up to date.

4.6 To improve its reputation an organisation has to

- listen to its customers and meet their needs and expectations
- do what it says it will do
- go out of its way to help the customer
- be consistent
- act with integrity
- have an active social media presence
- be aware of what its brand means to the customers.

Unit 211

Working in a retail environment

Level:	2
GLH:	22
Aim:	The aim of this unit is to develop the knowledge and understanding of a learner working in a retail environment. Learners will be able to process payments and deal with the return of goods. This unit also will confirm the learner's ability to display stock to promote sales and to check and replenish stock levels.

Learning outcome

The learner will:

LO1 process payments for purchases

Assessment criteria

The learner can:

AC1.1 advise customers the correct amount to pay, taking into account any **special offers or discounts** that apply

AC1.2 **resolve pricing problems**

AC1.3 process **payments** in line with own organisation's procedures

AC1.4 explain how to tell customers tactfully when **payment cannot be approved**

AC1.5 treat customers politely throughout the payment process

AC1.6 acknowledge other customers who are waiting

Range

Special offers or discounts: eg

- BOGOF
- Price matching
- Staff discount
- Loyalty discount

Pricing problems: eg

- Unknown price
- Incorrect pricing
- Discounts
- Customer misunderstanding

Resolving pricing problems:

- Referring to reliable pricing information
- Seeking advice from the person who can provide clarification when pricing information is unclear or unavailable

Payments: For example

- Cash
- Credit/debit card (PIN or contactless)
- Loyalty card

Payment cannot be approved:

- Card type not accepted by organisation
- Declined
- Card limit
- Floor limit

Learning outcome

The learner will:

LO2 Accurately process returned goods

Assessment criteria

The learner can:

AC2.1 describe **reasons** customers might have for returning goods

AC2.2 describe customers' **legal rights** to replacements and refunds

AC2.3 describe own organisation's policy concerning replacements and refunds

AC2.4 ask customers politely what goods they wish to return and the reason why

AC2.5 check type, quantity and **condition of returned goods**

AC2.6 offer customers replacements and refunds in accordance with legal and **organisational requirements** (where relevant)

AC2.7 describe politely to customers any **action** that will be taken concerning the returned goods

AC2.8 label clearly any goods that are to be returned to the supplier or manufacturer

AC2.9 place returned goods safely to the correct location or position

Range

Reason for return: For example

- faulty/damaged
- unwanted
- exchanges

Legal rights: For example

- Consumer Rights Act
- Consumer Credit Act

Condition of returned goods:

- Acceptable
- Unacceptable

Organisational requirements: For example:

- Limits of own authority
- Consumer charter/SLA (Service Level Agreement)

Action:

- Accepted
- Not Accepted
- Refer to Others

Learning outcome

The learner will:

LO3 Display stock to promote sales

Assessment criteria

The learner can:

AC3.1 explain how **sales can be promoted**

AC3.2 describe the **importance of correctly labelling products**

AC3.3 establish the availability of space and other resources needed

AC3.4 identify the **person(s) who can provide advice and/or assistance** if any problems arise

AC3.5 **perform checks on the space available** and **prepare area**

AC3.6 **set up a display**

AC3.7 **check the finished display**

AC3.8 clear the area of any equipment/materials

Range

How sales can be promoted:

- The effective use of space in a display
- The positioning of products within a display

Importance of correctly labelling products:

- Legal requirements
- Consequences of not meeting legal requirements

Person(s) who can provide advice and/or assistance: For example

- Manager
- Supervisor
- Colleague

Perform checks on the space available:

- Enough space for the display
- the display will not cause an obstruction

Prepare a display area:

- Remove any items not required
- ensure the area is safe and clean

Set up a display:

- using safe working practices
- following plan
- within the time allowed
- minimising the inconvenience caused to others

Check the finished display:

- has the levels of stock needed
- is clean and tidy
- is safe for use

Learning outcome

The learner will:

LO4 check stock levels and replenish stock

Assessment criteria

The learner can:

AC4.1 describe own organisation's **stock control system**

AC4.2 describe the procedures for informing colleagues of stock needs

AC4.3 check stock needed to maintain required levels

AC4.4 arrange for stock to be moved to the sales floor as needed

AC4.5 rotate stock in accordance with own organisational procedures

AC4.6 **dispose** of packaging waste

Range**Stock control system:**

- Manual
- electronic

Disposal:

- Recycling
- Non-recyclable
- In accordance with legislative requirements
- In accordance with own organisational procedures

Unit 211

Working in a retail environment

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence could include personal research resulting in:

- Reflective accounts
- Observation
- Product evidence
- Witness testimony
- Recorded video/discussion

Or a combination of the above

Unit guidance

Outcome 1: It is expected that the evidence for this outcome would include observation of the learner processing customer payment(s) using company procedures. Witness testimony and a reflective statement could also be used together with product evidence eg till records, pricing problems, refund records and oral/written questions.

Outcome 2: It is expected that the evidence for this would include observation of the learner carrying out refunds using company procedures. Witness testimony and a reflective statement could also be used together with product evidence eg till records, refund records, stock records, supplier return records and oral/written questions.

Outcome 3: It is expected that the evidence for this outcome would include observation of the learner displaying stock following company guidelines and procedures. Witness testimony and a reflective statement could also be used together with eg video evidence, relevant product evidence and oral/written questions.

Outcome 4: It is expected that the evidence for this outcome would include observation of the learner checking stock levels and replenishing stock following company guidelines and procedures. Witness testimony and a reflective statement could also be used together with eg video evidence, relevant product evidence and oral/written questions.

Unit 212

Social media in a work environment

Level:	2
GLH:	30
Aim:	This unit aims to develop the knowledge and skills required to use social media in a work environment. Upon completion of this unit, learners will be able to identify relevant social media and understand how and why they are used as a tool within business. They will have identified and developed an understanding of safety and security procedures within social media. They will be able to post and publish relevant approved material and demonstrate an ability to monitor customer engagement.

Learning outcome

The learner will:

LO1 Understand the use of social media in a working environment

Assessment criteria

The learner can:

AC1.1 describe what is meant by social media in business

AC1.2 explain the main advantages and disadvantages of social media

AC1.3 describe the use of social media to promote products and/or services

AC1.4 identify the **risks** of using social media

AC1.5 describe **tools** used to monitor customer social media engagement

Range

Risks: For example:

- Personal/Professional
- Organisational
- Customers
- Brand /Reputation
- Non-compliance with legislation

Tools: For example:

- Analytics
- Likes
- Hits
- Views

Learning outcome

The learner will:

LO2 Understand the safe use of social media

Assessment criteria

The learner can:

AC2.1 describe appropriate precautions that can be taken to ensure safety and privacy

AC2.2 explain why organisations, including own, have social media/networking policies

AC2.3 identify legal constraints on the uploading and downloading of **digital content**

Range

Digital content:

- Photographs
 - Images
 - Music
 - Films/videos
 - Comments
-

Learning outcome

The learner will:

LO3 Understand the need for safety and security practices

Assessment criteria

The learner can:

AC3.1 describe the danger of computer viruses and how to minimise risks

AC3.2 describe how to minimise **security threats**

AC3.3 describe where to access help and information when using social media

Range

Security threats: For example

- personal
 - to own organisation
 - hacking
 - cyber attacks
 - phishing
-

Learning outcome

The learner will:

LO4 Be able to demonstrate the use of social media in own organisation

Assessment criteria

The learner can:

AC4.1 identify the social media in use by own organisation

AC4.2 identify opportunities to post or publish **approved** material

AC4.3 post or publish **approved** material

AC4.4 use **tools** to monitor customer engagement

Range

Approved by: For example

- manager /owner
- supervisor
- marketing staff

Tools: For example

- analytics
- likes
- hits
- views

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence could include personal research resulting in:

- Reflective statements
- Witness statements
- Work products eg examples of using social media within own organisation, own organisation's policies and procedures
- Presentation
- Recorded discussions
- Or a combination of the above

Outcome 1: It is expected that the evidence for this outcome will include personal research of social media in current use. This will include evidence of understanding of advantages, disadvantages and risks. Learners should provide evidence that they can describe tools used to monitor customer social media engagement.

Outcome 2: It is expected that the evidence for this outcome will include personal research into the safe use of social media including privacy and compliance with legislation and organisational guidelines

Outcome 3: It is expected that the evidence for this outcome will include research into the need for safety and security practices online including threats to security and viruses, as well as research on how to access online help when required.

Outcome 4: It is expected that the evidence for this outcome would include observation of the learner demonstrating the use of social media within own organisation. This will include identifying opportunities to post or publish information and monitor customer engagement. Witness testimony and a reflective statement could also be used together with eg electronic evidence, relevant product evidence and oral/written questions.

Unit 213

Fundamentals of marketing

Level:	2
GLH:	26
Aim:	This unit aims to develop knowledge and understanding of marketing principles including how to segment the market, the value of marketing and the principles of socially responsible marketing. Learners will be required to develop a marketing plan which should be realistic with the potential to be applied. However, the learner is not required to implement the marketing plan.

Learning outcome

The learner will:

LO1 Understand how to segment the market

Assessment criteria

The learner can:

AC1.1 describe the difference between **market segments** and **customer classifications**

AC1.2 explain how to cluster customers with similar characteristics

AC1.3 describe how a range of products may appeal to different **market segments**

AC1.4 describe the importance of valid and reliable marketing data

AC1.5 describe different marketing **data collection methods**

AC1.6 describe the use of Customer Relationship Management (CRM) activities and systems

Range

Market segments: For example

- Age
- Gender
- Religion
- Culture
- Income
- Lifestyle

Customer classification:

- Business
- Non-business

Data collection methods: Strengths and weaknesses of

- Primary
 - Secondary
-

Learning outcome

The learner will:

LO2 Understand the value of marketing

Assessment criteria

The learner can:

AC2.1 describe the role of marketing in enhancing the sale of products and/or services

AC2.2 describe the **factors** to be taken into account when assessing the cost and value of marketing activities

AC2.3 explain the scope and purpose of **socially responsible marketing**

AC2.4 explain the importance of involving **stakeholders** in socially responsible marketing activities

Range

Factors:

- Own organisation's mission statement
- Target audience
- Marketing mediums
- Timeframes
- Budget

Socially responsible marketing:

- Ethical eg health, education, environmental
- Corporate social responsibility eg diversity, community responsibility

Stakeholders: For example

- Internal and external customers
 - Investors
 - Clients
 - Shareholders
-

Learning outcome

The learner will:

LO3 Be able to develop a marketing plan

Assessment criteria

The learner can:

AC3.1 conduct a **SWOT analysis** of a chosen product or service

AC3.2 develop a **marketing strategy** agreeing with appropriate person(s)

AC3.3 develop a **marketing plan** on chosen product or service

Range

SWOT Analysis of:

- Mission statement
- Company objectives
- Internal and external factors
- Markets both current and targeting
- Market share
- Competition
- Resources
- Distribution methods
- Use of primary and secondary data (qualitative and quantitative)

Marketing strategy:

- Intended objective
- Intended implementation method eg Ansoff, Porter

Marketing Plan:

- Details of chosen product or service
- Objectives
- Activities to be undertaken
- Budget
- Timescales
- Involvement of stakeholders

Supporting information

Evidence requirements

Evidence for this unit will differ across different sizes of organisations. We expect that the evidence could include personal research resulting in:

- reflective statement
- presentation
- work products e.g. mission statement, organisational objectives, SWOT analysis, marketing strategy and marketing plan
- recorded discussion with for example senior members of organisation or owner
- or a combination of the above

Outcome 1: The evidence for this outcome could include personal research into own organisation's products and services and an understanding of market segmentation and customer classifications. It is expected the evidence will include detail of relevant marketing data and the methods of data collection.

Outcome 2: The evidence for this outcome will include personal research into the role of marketing and the factors to be taken into account when assessing the cost and value of marketing activities. It is expected there will be evidence of an understanding of socially responsible marketing.

Outcome 3: It is likely for large organisations there will be written and visible mission statement and objectives, while for medium to small organisations the mission statement and objectives may be less visible and projected by a senior member of the organisation e.g. director, chief executive, owner. We expect examples of own organisation's mission statement and objectives to be evidenced confirming own understanding and ability to use them in the creation of the plan. There will be evidence of stages in the creation of the marketing plan from analysis, strategy and budgeting. Marketing plans should be realistic with the potential to be applied however, the learner is not required to implement the marketing plan.

Appendix 1. Mapping of qualification content to Level 2 Customer Service Practitioner Standard

Evaluation of standard against Level 2 Diploma for Customer Service Practitioners (2794-02)

The following tables are the results of a mapping exercise of the knowledge, skills and behaviours/attitude from the Level 2 Customer Service Practitioner Standard against the learning outcomes of the Level 2 Diploma for Customer Service Practitioners qualification.

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning outcome and Assessment criteria
Knowledge	Knowing your customers: <ul style="list-style-type: none"> • Understand who customers are. • Understand the difference between internal and external customers. • Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective. 	Unit 204: 1.1-1.5 Unit 205: 5.1-5.7
	Understanding the organisation: <ul style="list-style-type: none"> • Know the purpose of the business and what 'brand promise' means. • Know your organisation's core values and how they link to the service culture. • Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation. 	Unit 202: 4.1-4.3 Unit 203: 1.1-1.3; 2.1-2.5; 3.1-3.5; 4.1-4.4 Unit 205: 3.1
	Meeting regulations and legislation: <ul style="list-style-type: none"> • Know the appropriate legislation and regulatory requirements that affect your business. • Know your responsibility in relation to this and how to apply it when delivering service. 	Unit 202: 1.1-1.3, 2.1-2.3, 3.1-3.3
	Systems and resources:	Unit 202: 5.1-5.3 Unit 203: 5.1-5.2

	<ul style="list-style-type: none"> • Know how to use systems, equipment and technology to meet the needs of your customers. • Understand types of measurement and evaluation tools available to monitor customer service levels. 	
	<p>Your role and responsibility:</p> <ul style="list-style-type: none"> • Understand your role and responsibility within your organisation and the impact of your actions on others. • Know the targets and goals you need to deliver against. 	Unit 201: 1.1-1.4; 4.4-4.5
	<p>Customer experience:</p> <ul style="list-style-type: none"> • Understand how establishing the facts enable you to create a customer focused experience and appropriate response. • Understand how to build trust with a customer and why this is important. 	Unit 203: 2.1-2.5
	<p>Product and service knowledge: Understand the products or services that are available from your organisation and keep up-to-date.</p>	Unit 205: 1.1-1.4

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning outcome and Assessment criteria
Skills	Interpersonal skills: Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery.	Unit 204: 4.2, 5.1-5.2 Unit 205: 4.3, 4.7 Unit 206: 1.1
	Communication: <ul style="list-style-type: none"> • Depending on your job role and work environment: <ul style="list-style-type: none"> ○ Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or <ul style="list-style-type: none"> ○ Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. ○ Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand. 	Unit 205: 4.1, 4.4, 4.6-4.7 Unit 206: 1.5-1.7
	Influencing skills: Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	Unit 206: 3.1-3.4, 4.1
	Personal organisation: Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.	Unit 201: 2.1-2.5

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning outcome and Assessment criteria
	<p>Dealing with customer conflict and challenge:</p> <ul style="list-style-type: none"> • Demonstrate patience and calmness. • Show you understand the customer’s point of view. • Use appropriate sign-posting or resolution to meet your customers needs and manage expectations. • Maintain informative communication during service recovery. 	<p>Unit 206: 2.1 -2.3, 4.1-4.4</p>

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning outcome and Assessment criteria
Behaviours/Attitude	Developing self: <ul style="list-style-type: none"> • Take ownership for keeping your service knowledge and skills up-to-date. • Consider personal goals and propose development that would help achieve them. 	Unit 201: 4.1-4.3, 4.6
	Being open to feedback: Act on and seek feedback from others to develop or maintain personal service skills and knowledge.	Unit 201: 3.1-3.5
	Team working: <ul style="list-style-type: none"> • Frequently and consistently communicate and work with others in the interest of helping customers efficiently. • Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice 	Unit 204: 4.1-4.4, 5.3-5.4 Unit 206: 1.9
	Equality – treating all customers as individuals: <ul style="list-style-type: none"> • Treat customers as individuals to provide a personalised customer service experience. • Uphold the organisations core values and service culture through your actions. 	Unit 204: 3.1-3.3
	Presentation – dress code, professional language: Demonstrate personal pride in the job through appropriate dress and positive and confident language.	Unit 205: 2.1-2.5

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning outcome and Assessment criteria
	<p>‘Right first time‘:</p> <ul style="list-style-type: none"> • Use communication behaviours that establish clearly what each customer requires and manage their expectations. • Take ownership from the first contact and then take responsibility for fulfilling your promise. 	<p>Unit 205: 3.2-3.6, 4.1-4.5 Unit 206: 1.2-1.4, 1.8</p>

Appendix 2 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 [Centre document library](#) on www.cityandguilds.com or click on the links below:

Centre Handbook: Quality Assurance Standards

This document is for all approved centres and provides guidance to support their delivery of our qualifications. It includes information on:

- centre quality assurance criteria and monitoring activities
- administration and assessment systems
- centre-facing support teams at City & Guilds/ILM
- centre quality assurance roles and responsibilities.

The Centre Handbook should be used to ensure compliance with the terms and conditions of the centre contract.

Centre Assessment: Quality Assurance Standards

This document sets out the minimum common quality assurance requirements for our regulated and non-regulated qualifications that feature centre-assessed components. Specific guidance will also be included in relevant qualification handbooks and/or assessment documentation.

It incorporates our expectations for centre internal quality assurance and the external quality assurance methods we use to ensure that assessment standards are met and upheld. It also details the range of sanctions that may be put in place when centres do not comply with our requirements or actions that will be taken to align centre marking/assessment to required standards. Additionally, it provides detailed guidance on the secure and valid administration of centre assessments.

Access arrangements: When and how applications need to be made to City & Guilds

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 document library](#) also contains useful information on such things as:

- conducting examinations
- registering learners
- appeals and malpractice.

Useful contacts

Please visit the [Contact us](#) section of the City & Guilds website.

City & Guilds

For almost 150 years, we have worked with people, organisations and economies to help them identify and develop the skills they need to thrive. We understand the life-changing link between skills development, social mobility, prosperity and success. Everything we do is focused on developing and delivering high-quality training, qualifications, assessments and credentials that lead to jobs and meet the changing needs of industry.

We partner with our customers to deliver work-based learning programmes that build competency to support better prospects for people, organisations and wider society. We create flexible learning pathways that support lifelong employability because we believe that people deserve the opportunity to (re)train and (re)learn again and again – gaining new skills at every stage of life, regardless of where they start.

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