

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

Version 1.2 (October 2017)

Qualification Handbook

Qualification at a glance

Subject area	Customer Service
City & Guilds number	2794
Age group approved	16-19, 19+
Entry requirements	None
Assessment types	Portfolio
Approvals	Fast track approval
Support materials	Smartscreen
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

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

Version and date	Change detail	Section
1.1 Oct 17	Added Mapping document of qualification to standard.	Appendix 1
1.2 Oct 17	Corrected numbering of assessment criteria in unit 205 learning outcome 1	Units

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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?	The qualification covers a range of topics: <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?	Level 2 Diploma for Customer Service Practitioners 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

Level 2 Diploma for Customer Service Practitioners

City & Guilds unit number	Unit title	GLH
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Learners must complete 201-206 and one unit from (207 -213)

Mandatory Units

201	Developing self to achieve targets and goals	30
202	Recognition of regulations and legislation within own organisation	30
203	Principles of Business	27
204	Contribute to a customer focused experience	38
205	Provide customer service	28
206	Manage customer expectations	28

Optional Units

207	Working in a sales environment	25
208	Working in an administrative environment	27
209	Working in a contact centre environment	25
210	Customer service principles	20
211	Working in a retail environment	22
212	Social media in a work environment	30
213	Fundamentals of marketing	26

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

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

2 Centre requirements

Approval

If your Centre is approved to offer the qualification Level 2 Diploma in Customer Service (5530 - 02) then you can apply for the new Level 2 Diploma for Customer Service Practitioners (2794-02) approval using the fast track approval form, available from the City & Guilds website.

Centres should use the fast track form if:

- there have been no changes to the way the qualifications are delivered, and
- they meet all of the approval criteria in the fast track form guidance notes.

Fast track approval is available for 12 months from the launch of the qualification. After 12 months, the Centre will have to go through the standard Qualification Approval Process. The centre is responsible for checking that fast track approval is still current at the time of application.

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the Centre Manual - Supporting Customer Excellence for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications 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 areas 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.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Assessors and internal quality assurers

Centre Assessors and Internal Quality Assurers should hold, or be working towards, the relevant Assessor/Internal Quality Assurer TAQA qualification for their role in delivering, assessing and quality assuring this qualification and meet the relevant experience requirements above.

The primary responsibility of an Assessor is to assess candidate's performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as in depth technical understanding related to the qualifications for which they will be assessing candidates.

Assessors must:

- Hold (or be working towards) an appropriate qualification confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors working towards an appropriate qualification must have their decisions countersigned by a suitably qualified assessor/quality assurer. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards.
- Be occupationally competent or have the necessary and sufficient experience of the role for which they intend to undertake assessments, including the level and scope of individual candidate performance at work or in RWEs: and judgements about the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint their own assessors.

Learner entry requirements

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

Age restrictions

City & Guilds cannot accept any registrations for learners under 16 as these qualifications are not approved for learners under 16.

3 Delivering the qualification

Initial assessment and induction

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

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

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

Support materials

The following resources are available for these qualifications:

Description	How to access
Smartscreen	www.cityandguilds.com

Recording documents

Candidates 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 learners' 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 verifier, 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.

4 Assessment

Summary of assessment methods

Candidates must:

- have a completed portfolio of evidence for each mandatory unit (units 201-206) 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 strategy

Portfolio Evidence

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the competence units.
- These conditions would be those typical of the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

Simulation

- Where simulation is used for units at Level 2 and above, it should be used sparingly and should only form a very small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. RWE must be discussed and agreed with the EQA.

Evidence Requirements

Evidence requirements have been included for each Customer Service unit.

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

Naturalistic observation of workplace activities: Assessors must provide information about the context of the assessment.

Products: Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records.

Expert witness: Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.

Witness testimony: Can provide valuable evidence of candidate competence. In line with established principles, witness testimony must be:

- a clear, authentic statement indicating how the learner carries out their job
- dated, signed and include the job title of the witness.

Candidate reports (feedback): Oral or written reports from the candidate which involve descriptions of activities and processes and some self-assessment, e.g. a work diary.

Reflective accounts: A reflective account is usually a write up of how a candidate has carried out part of their job, recording events that actually happened. Where possible, the account should state why the candidate took the actions they did.

Professional discussion: Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.

Verbal / written questions: Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge. Questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate.

Projects: An extended piece of practical and / or written work involving planning and research, generally presented as a report.

Assignments: May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.

Case studies: An effective case study report should:

- clearly identify the core problem(s)
- analyse the issues underlying the problem
- discuss and justify alternative solutions using theory / experience
- present feasible recommendations
- be presented in an appropriate format

Audio / video recordings: May be used to support observation reports, examination of work products and knowledge questionnaires.

Simulation / role play: A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment'

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit. The most appropriate forms of evidence should be selected for each unit or part of a unit.

Test Specifications

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

Test: 210	Duration: 60 minutes		
Unit	Outcome	Number of questions	%
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

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.

For this qualification, RPL is allowed and is not sector specific.

5 Units

Structure of the units

These units each have the following:

- City & Guilds reference number
- Title
- Level
- Guided learning hours (GLH)
- Learning outcomes, which are comprised of a number of assessment criteria

Centres must deliver the full breadth of the range. Specialist equipment or commodities may not be available to all centres, so centres should ensure that their delivery covers their use. This may be covered by a practical demonstration (e.g. video). For the practical assessments for this qualification, centres should ensure that there are sufficient resources to complete the task but are not required to use all the equipment or commodities in the range.

Unit level:	Level 2
GLH:	30
Unit 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:

- 1 understand own role and responsibilities including targets and goals

Assessment criteria

The learner can:

- 1.1 describe own role and responsibilities
- 1.2 identify agreed targets and goals in own role
- 1.3 explain how own actions impact on others in own organisation
- 1.4 describe how to achieve agreed targets and goals

Range

(AC1.2, **Targets and goals:**

- AC1.4)
- Personal
 - Organisational

Learning outcome

The learner will:

- 2 organise own workload/activity to meet deadlines

Assessment criteria

The learner can:

- 2.1 agree goals and deadlines for completing tasks with an appropriate person
 - 2.2 prioritise and plan the completion of tasks to meet delivery deadlines
 - 2.3 use tools and techniques to monitor progress of tasks
 - 2.4 adjust priorities as required
 - 2.5 meet agreed deadlines
-

Range

(AC2.1) **Appropriate person eg:**

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

(AC2.3) **Tools and techniques eg:**

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

(AC2.4) **Adjust priorities eg:**

- 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:

- 3 obtain and act on personal feedback from others to develop and/or maintain personal service skills and knowledge

Assessment criteria

The learner can:

- 3.1 describe examples of feedback
- 3.2 identify suitable ways of obtaining feedback on own service skills and knowledge.
- 3.3 obtain useful and constructive feedback on own service skills and knowledge.
- 3.4 respond positively to feedback.
- 3.5 use feedback to take responsibility for developing and maintaining own personal customer service skills and knowledge.

Range

(AC3.1, **Feedback eg:**

- AC3.2, • Comments cards
- AC3.3, • Informal communication – phone calls and conversations
- AC3.4, • Feedback /suggestion boxes
- AC3.5) • Thank you letters/cards

(AC3.1, **Formal eg:**

- AC3.2, • Call monitoring/coaching/observation
 - AC3.3, • 1-to-1/appraisals/ Personal Development Review(PDR)
 - AC3.4, • 360° feedback
 - AC3.5) • Surveys/feedback forms
 - Questionnaires
 - Social media
 - Emails
- Mystery shopper
- Follow-up calls

Learning outcome

The learner will:

- 4 prepare a personal development plan to achieve personal goals and development needs

Assessment criteria

The learner can:

- 4.1 identify self-assessment techniques, applying the most appropriate for own role.
- 4.2 identify own strengths and weaknesses in relation to own role.
- 4.3 prepare a personal development plan with an appropriate person.
- 4.4 identify Specific, Measurable, Achievable, Realistic and Time-bound (SMART) objectives.
- 4.5 apply agreed SMART objectives.
- 4.6 review the effectiveness of own personal development plan and update it accordingly.

Range

(AC4.1) **Self-assessment techniques eg:**

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

(AC4.3) **Appropriate person eg:**

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

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 eg 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

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.

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.

Unit 202

Recognition of regulations and legislation within own organisation

Unit level:	Level 2
GLH:	30
Unit 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:

- 1 understand the use of regulations and legislation

Assessment criteria

The learner can:

- 1.1 identify the different regulations and legislation that affect own organisation
- 1.2 explain how relevant regulations and legislation affect own organisation and its customer service provision
- 1.3 identify own responsibility in applying regulations and legislation when delivering customer service

Range

(AC1.1, **Regulations and legislation eg:**

- AC1.2, • Customer charter
- AC1.3) • Service level agreement
- Refund policy
- Financial Services Act
- Consumer Rights Act
- Ethical standards
- Code of practice

(AC1.3) **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:

- 2 understand the Health and Safety at Work Act

Assessment criteria

The learner can:

- 2.1 state the importance of applying the Health and Safety at Work Act within own organisation
 - 2.2 state the responsibilities of employers under the Health and Safety at Work Act
 - 2.3 state the responsibilities of employees under the Health and Safety at Work Act
-

Range

(AC2.1) **Importance for:**

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

Learning outcome

The learner will:

- 3 understand the importance of confidentiality of information.

Assessment criteria

The learner can:

- 3.1 state the importance of keeping information confidential within an organisation
 - 3.2 identify the information which needs to be kept and remain confidential within own organisation
 - 3.3 state own responsibilities for keeping information confidential in own organisation
-

Range

(AC3.1) **Importance for:**

- Self
- Customers
- Organisation

(AC3.2) **Information relating to:**

- Customers (internal and external)
 - Own organisation
-

Learning outcome

The learner will:

- 4 understand what is meant by social and digital media and the guidelines for their use

Assessment criteria

The learner can:

- 4.1 identify examples of digital media platforms
- 4.2 describe the digital media policies that exist in own or other customer service organisations
- 4.3 describe the guidelines in a digital media policy that affect the use of social and digital media in the work environment

Range

(AC4.3) **Guidelines eg:**

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

Learning outcome

The learner will:

- 5 know how to use systems, equipment and/or technology to meet the needs of own customers following organisational requirements

Assessment criteria

The learner can:

- 5.1 identify the different systems, equipment and/or technology own organisation uses to effectively meet customer needs
- 5.2 describe how in own role, systems, equipment and/or technology are used to support customer needs
- 5.3 explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively

Range

(AC5.2) **Customer:**

- Internal
- External

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 level:	Level 2
GLH:	27
Unit 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:

- 1 understand own organisation and industry sectors

Assessment criteria

The learner can:

- 1.1 describe the differences between industry sectors
- 1.2 describe the purpose of own organisation business type and the industry sector it falls in
- 1.3 state the aims of own organisation in relation to its industry sector.

Range

(AC1.1, **Industry sector:**

AC1.2, • Private:

- AC1.3)
- Sole Trader
 - Partnership
 - Public Limited Company
 - Private Limited Company
 - Franchise

• Public:

- Government Departments
- Local Authorities
- Public corporations

• Third Sector:

- Not for profit
- Registered Charities

Learning outcome

The learner will:

- 2 understand own organisation's core values and service culture and how they relate to each other.

Assessment criteria

The learner can:

- 2.1 describe what is meant by core values.
 - 2.2 explain own organisation's core values
 - 2.3 describe what is meant by service culture
 - 2.4 explain own organisation's service culture
 - 2.5 explain how own organisation's core values relate to its service culture.
-

Range

(AC2.2) **Core values eg:**

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

(AC2.4) **Service culture eg:**

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

Learning outcome

The learner will:

- 3 understand the purpose of a 'brand promise'

Assessment criteria

The learner can:

- 3.1 describe what is meant by the term 'brand promise'.
 - 3.2 state own organisation's 'brand promise'
 - 3.3 state what own organisation's brand promise means to self, organisation and customer
 - 3.4 describe why it is important for a customer to be able to identify a 'brand'
 - 3.5 describe what can impact on effectiveness of the brand.
-

Range

(AC3.1) **Brand Promise:**

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

Learning outcome

The learner will:

- 4 understand the purpose of organisational policies and procedures including those that affect own customer service role.

Assessment criteria

The learner can:

- 4.1 describe the purpose of an organisational policy.
- 4.2 list organisational policies and procedures that affect own customer service role.
- 4.3 state the purpose of different organisational policies and how these affect own customer service role.
- 4.4 state what should be included in a complaints process/procedure.

Range

(AC4.2) **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:

- 5 understand types of measurement and evaluation tools available to monitor customer service levels

Assessment criteria

The learner can:

- 5.1 identify the types of measurement and evaluation tools used to monitor customer service level
- 5.2 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 eg 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 eg 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 level:	Level 2
GLH:	38
Unit 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:

- 1 understand the characteristics of organisation's customer base.

Assessment criteria

The learner can:

- 1.1 identify who own customers are
- 1.2 identify own organisation's customers
- 1.3 describe types of customers
- 1.4 explain the difference between internal and external customers in the context of own organisation.
- 1.5 identify own organisation's internal and external customers

Range

(AC1.3) **Types of customers eg:**

- Challenging
- Regular
- Impatient
- Dissatisfied
- Undecided
- Those with
 - Special requirements
 - Language barriers
 - Cultural differences

Learning outcome

The learner will:

- 2 understand how to create a customer focused experience

Assessment criteria

The learner can:

- 2.1 explain what is meant by a customer focused experience
- 2.2 explain how to establish the facts to create a customer focused experience
- 2.3 explain how an understanding of the facts can be used to create a customer focused experience
- 2.4 explain the importance of building customer trust
- 2.5 explain how to start to build trust with own customers

Range

(AC2.4) **Importance of building customer trust to:**

- Self
- Customer
- Organisation

Learning outcome

The learner will:

- 3 treat all customers as individuals

Assessment criteria

The learner can:

- 3.1 treat all customers equally ensuring compliance with legal requirements.
- 3.2 provide a personalised service experience, recognising and responding to individual needs.
- 3.3 apply consistently own organisation's core values and service culture when dealing with customers.

Range

(AC3.1) **Legal requirements:**

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

(AC3.2) **Individual needs eg:**

- special requirements
- language barrier
- cultural differences

(AC3.3) **Core values eg:**

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

(AC3.3) **Service culture:**

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

Learning outcome

The learner will:

- 4 be able to communicate and work with others in the interests of helping customers

Assessment criteria

The learner can:

- 4.1 describe the interpersonal skills required to work effectively as part of a team
- 4.2 demonstrate interpersonal skills while working as part of a team
- 4.3 work and cooperate with others in a positive and productive manner
- 4.4 communicate information in a timely and reliable manner to team members to support them in meeting customer needs
-

Range

(AC4.1) **Interpersonal skills:**

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

(AC4.1, **Team eg:**

- AC4.2, • Appropriate colleagues
- AC4.4) • Manager/Supervisor/team leader
- Project teams
 - Other relevant teams/departments

Learning outcome

The learner will:

- 5 be able to share personal learning and present recommendations to support good practice.

Assessment criteria

The learner can:

- 5.1 identify examples/case studies of good practice in customer service delivery
- 5.2 state methods of sharing good practice with others
- 5.3 share personal learning and information with others to support good customer service practice
- 5.4 present your ideas and recommendations for improvements in customer service to others

Range

(AC5.2, **Others eg:**

- AC5.3, • Appropriate colleagues
- AC5.4) • Manager/Supervisor/team leader
- Project teams
 - Other relevant teams/departments

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.

Outcomes 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 level:	Level 2
GLH:	28
Unit 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:

- 1 understand the product(s) and/or service(s) of own organisation.

Assessment criteria

The learner can:

- 1.1 state own organisation's product(s) and/or service(s).
- 1.2 describe the difference between providing:
 - a. a product
 - b. a service
- 1.3 explain the difference between the features and benefits of the product(s) and/or service(s) provided by own organisation
- 1.4 describe how own knowledge of organisation's product(s) and/or service(s) is updated and maintained

Range

- (AC) **Updated:**
- Internal sources
 - External sources
- (AC) **Maintained eg:**
- Continuous Professional Development (CPD)
 - Record of attendance
 - Certificates
 - Or individual to own organisation

Learning outcome

The learner will:

- 2 demonstrate a professional image, following the organisation's code of conduct and dress code.

Assessment criteria

The learner can:

- 2.1 present organisation's standards of a tidy and professional image.
- 2.2 follow the organisation's code of conduct and dress code.
- 2.3 demonstrate an approachable and welcoming attitude and/or tone, when dealing with customers
 - a. Face to face
 - b. Non face to face
- 2.4 demonstrate a positive attitude with customers when dealing with various situations.
- 2.5 use professional and positive language consistently when dealing with different customer situations.

Range

(AC2.1, **Presentation, attitude and professional image:**

AC2.2, • Personal presentation/dress/uniform

AC2.3, • Presentation of work area

AC2.4, • Tone of voice /language used

AC2.5) • Body language

(AC2.2) **Code of conduct eg:**

• Social standards

• Rules and responsibilities

• Ethical practice

(AC2.4, **Situations eg:**

AC2.5) • Difficult and/or dissatisfied customers

• Customers with special requirements

• System and/or procedural issues

Learning outcome

The learner will:

- 3 be able to follow own organisation's procedures in ensuring good customer service

Assessment criteria

The learner can:

- 3.1 identify policies and procedures relevant to customer service
- 3.2 recognise the importance of good customer service to customers and in turn own organisation
- 3.3 demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers
- 3.4 refer customers to others as required, passing on necessary information
- 3.5 follow up with customers and others as required to ensure conclusion
- 3.6 carry out own organisational procedures when checking customer satisfaction

Range

(AC3.4, **Others eg:**

- AC3.5)
- Other department(s)
 - Colleagues
 - Management
 - Supervisor/Team leader
 - Specialist

(AC3.5) **Conclusion:**

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

Learning outcome

The learner will:

- 4 be able to make initial customer contact while establishing and responding to needs and expectations

Assessment criteria

The learner can:

- 4.1 make initial customer contact and use appropriate communication skills in a professional manner following own organisational procedures
- 4.2 establish customer needs from wants
- 4.3 use appropriate techniques to establish the customer needs and expectations
- 4.4 adapt techniques when confirming own and customers' understanding of needs and expectations
- 4.5 deal with customers confidently, remaining positive and professional when circumstances are challenging
- 4.6 adapt techniques to meet and manage customer needs and expectations in a professional and timely manner
- 4.7 use appropriate techniques to maintain or enhance the customer experience

Range

(AC4.1, **Customers eg:**

- AC4.1, • General
- AC4.1, • Impatient
- AC4.1, • Dissatisfied
- AC4.1, • Undecided
- AC4.1) • Those with
 - Special requirements
 - Language barriers

(AC4.2, **Customers:**

- AC4.3, • Internal
- AC4.4, • External
- AC4.5,
- AC4.6)

(AC4.3, **Techniques:**

- AC4.4, • Attitude
- AC4.6, • Behaviour
- AC4.7, • Tone
- AC) • Body language eg
 - Body movements
 - Facial expressions
 - Hand gestures
 - Posture

Learning outcome

The learner will:

- 5 understand the different needs and priorities of own customers and how to manage expectations.

Assessment criteria

The learner can:

- 5.1 state the purpose of customer service
- 5.2 identify the needs of own customers
- 5.3 identify the priorities of own customers
- 5.4 describe the specific needs of different customers, including those protected under current equality law
- 5.5 state what is meant by customer expectations
- 5.6 explain when and how to adapt own service approach to meet the needs and expectations of customers
- 5.7 state how the standard of customer service offered affects the success of own organisation

Range

(AC5.4) **different customers eg:**

- Challenging
- Regular
- Impatient
- Dissatisfied
- Those with
- Undecided
 - Special requirements
 - Language barriers

(AC5.6) **Adapt:**

- Tone
- Body language
- Attitude

(AC5.7) **Affects the success:**

- Positive
- Negative

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.

Outcomes 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 eg:

- 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 level:	Level 2
GLH:	28
Unit 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:

- 1 be able to use communication and interpersonal skills in working towards meeting customer needs and expectations

Assessment criteria

The learner can:

- 1.1 show willingness and ability to engage in a positive manner using relevant interpersonal skills
- 1.2 take ownership from beginning to end, building and maintaining a relationship/rapport
- 1.3 show ability to work towards meeting needs and expectations
- 1.4 remain positive and professional when customer needs and/or expectations cannot be met
- 1.5 demonstrate ability to recognise when to summarise
- 1.6 use summarising language and/or reinforcement techniques to confirm understanding
- 1.7 use correct, appropriate and clear communication skills that reflect own organisation's brand
- 1.8 display knowledge of own organisational products and/or services
- 1.9 show willingness to work with others and share knowledge, ideas and good practice

Range

(AC1.1) **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

(AC1.6) **Summarising language and/or reinforcement techniques eg:**

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

(AC1.7) **Communication skills eg:**

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

Learning outcome

The learner will:

- 2 demonstrate a confident, patient and calm manner while understanding the customer's point of view

Assessment criteria

The learner can:

- 2.1 maintain calmness, empathy and patience when dealing with challenging situations
 - 2.2 use listening and/or questioning skills to understand the situation from the customer's point of view
 - 2.3 remain sensitive to, and interested in, the customers' concerns
-

Range

(AC2.1) **Challenging situations:** eg:

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

(AC2.2) **Listening skills:**

- active listening

(AC2.2) **Questioning skills (oral and/or written):**

- open
 - closed
 - probing
 - leading
-

Learning outcome

The learner will:

- 3 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:

- 3.1 use questioning and listening skills to identify customer needs
- 3.2 offer product(s) and/or service(s) that meet the identified needs of the customer and own organisation
- 3.3 communicate how the product(s) and/or service(s) offered meet customer needs
- 3.4 handle customer objections in a positive and professional manner ensuring a mutual outcome is agreed

Range

(AC3.1) **Questioning skills (oral and/or written):**

- open
- closed
- probing
- leading

(AC3.1) **Listening skills:**

- Active listening

(AC3.4) **Handle customer objections:**

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

Learning outcome

The learner will:

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

Assessment criteria

The learner can:

- 4.1 explain in a logical manner next steps and/or customer's options
- 4.2 provide sign-posting and/or resolution in line with organisational policies and/or procedures
- 4.3 keep customers informed of progress while resolving issues
- 4.4 maintain accurate records of customer issues and progress to resolution

Range

- (AC4.1) **Next steps and/or customer options:** eg:
- Escalation to a senior member of staff
 - Written complaint
 - Regulators
- (AC4.2) **Organisational policies and/or procedures:** eg:
- Complaints
 - Refund
 - Social and Digital Media
 - Service offer/Service Level Agreement
 - Roles and responsibilities showing limits of authority
- (AC4.3) **Keeping customers informed:** eg:
- Face to face
 - Phone
 - Written and/or digital communication
- (AC4.4) **Records of customer issues:** eg:
- Recording of calls
 - Written and/or digital communication
 - Complaints log

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

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

Simulations should not be used in this unit.

Unit level:	Level 2
GLH:	25
Unit 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:

- 1 understand the sales environment and sales cycle of own organisation.

Assessment criteria

The learner can:

- 1.1 describe own organisation's sales environment
- 1.2 explain own organisation's sales cycle
- 1.3 state the legal and regulatory requirements of own role in relation to sales
- 1.4 state own organisation's procedures for raising legal and/or regulatory concerns

Range

(AC1.1) 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

(AC1.3) 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

Learning outcome

The learner will:

- 2 understand sales techniques, including those of up-selling and cross-selling

Assessment criteria

The learner can:

- 2.1 explain the difference between proactive and reactive selling
 - 2.2 describe how techniques such as cross-selling and up-selling can be applied in sales
 - 2.3 describe the advantages of own organisation's product(s) and/or service(s) against competitors
 - 2.4 describe types of listening and questioning techniques that can be used in sales
 - 2.5 describe how to interpret non-verbal behaviour in sales
 - 2.6 describe how to perform a trial close to establish whether the customer is ready to purchase
-

Range

(AC2.4) **Questioning techniques (oral and/or written):**

- Open
- Closed
- Probing
- Leading

(AC2.4) **Listening skills:**

- Active listening

(AC2.5) **Non-verbal behaviour:**

- Attitude
 - Body language
-

Learning outcome

The learner will:

- 3 understand how to process and follow-up on sales orders within own organisation

Assessment criteria

The learner can:

- 3.1 describe own organisation's processes for ordering product(s) and/or service(s)
 - 3.2 describe the different payment types accepted
 - 3.3 describe the service standards expected for sales order completion
 - 3.4 explain where to go for support with a sales order
 - 3.5 describe procedures for dealing with customers' after sales requirements
-

- 3.6 explain how to balance the after sales requirements of the customer with those of own organisation
- 3.7 explain the limits of own authority and who to refer to if a customer's after sales requirement cannot be resolved
-

Range

(AC3.3) **Service standards:** eg:

- Response time
- Accessibility
- Delivery times

(AC3.5, **After sales requirements:**

AC3.6, • Activities that would normally take place after a sale eg

- AC3.6) -
- Queries
 - Complaints
 - Refunds
-

Learning outcome

The learner will:

- 4 undertake sales activities following own organisation's sales cycle

Assessment criteria

The learner can:

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

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

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.

Simulation should not be used in this unit.

Unit level:	Level 2
GLH:	27
Unit 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:

- 1 input, process and present documents and/or information

Assessment criteria

The learner can:

- 1.1 select, prepare and check information ready for processing
- 1.2 format and edit information
- 1.3 produce documents and/or information in accordance with own organisation's procedure and/or guidelines
- 1.4 check documents and/or information for accuracy making corrections as necessary
- 1.5 select and use appropriate methods to present information
- 1.6 use relevant distribution channels

Range

(AC1.2) **Format:** eg:

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

(AC1.2) **Edit information:** eg:

- select
- insert
- delete
- cut
- copy
- paste
- drag and drop
- find and replace
- labelling

- colour and resolution
- size

(AC1.3) **In accordance with:** eg:

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

(AC1.4) **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

(AC1.5) **Presentation methods:** will vary according to the software and document/information

(AC1.6) **Distribution channels:** eg:

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

Learning outcome

The learner will:

- 2 be able to store and retrieve information

Assessment criteria

The learner can:

- 2.1 describe own organisation's systems and procedures for storing and retrieving information
- 2.2 identify legal and organisational requirements for information security and retention
- 2.3 create filing systems to facilitate information identification for storage and/or retrieval
- 2.4 store and/or retrieve the required information within the agreed timescale
- 2.5 describe what to do when issues arise when storing and/or retrieving information
- 2.6 follow organisational and/or legal guidelines and conventions for the storage and/or retrieval of data

Range

(AC2.1) **Systems:** eg:

- paper-based
- electronic

(AC2.1) **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

(AC2.2, **Legal:**

- AC2.6)
 - Freedom of Information Act
 - Data Protection Act

(AC2.3) **Filing systems:** eg:

- manual
- electronic

(AC2.5) **Issues:** eg:

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

Learning outcome

The learner will:

- 3 understand the organisation and administration of meetings

Assessment criteria

The learner can:

- 3.1 describe different types of meetings
 - 3.2 describe different ways of providing administrative support for meetings
 - 3.3 explain the steps involved in organising meetings
-

Range

(AC3.1) Types of meetings:

Formal

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

Informal

- Departmental
- Team
- Briefings
- Progress

(AC3.2) Administrative support:

Documentation required:

- Notice
- Agenda
- notes/minutes
- attendance register

Facilities

- Room booking
- Equipment
- Refreshment
- Stationery

(AC3.3) 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:

- 4 understand the use of mail services in a business context

Assessment criteria

The learner can:

- 4.1 describe the different types and purposes of mail services used by organisations
- 4.2 explain the factors to be considered when selecting mail services
- 4.3 explain the factors to be taken into account when choosing postage methods
- 4.4 state how efficient distribution of mail benefits the business
- 4.5 state why inaccuracies or delays can have a negative impact on the business

Range

(AC4.1) **Mail services:**

- post office
- couriers
- international distributors
- internal circulation

(AC4.3) **Postage methods:**

- First/second class
- special deliveries
- parcel post

Supporting Information***Evidence requirements***

Evidence requirements for outcome 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

Unit guidance

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 outcome 3 and 4:

We expect that the evidence will be provided through a professional discussion.

Simulation should not be used in this unit.

Unit level:	Level 2
GLH:	25
Unit 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:

- 1 understand how to deal with telephone calls

Assessment criteria

The learner can:

- 1.1 describe the importance of having customer service aims, objectives and service offers in a contact centre
- 1.2 describe how to use the technology and software in own role
- 1.3 describe procedures for opening, closing and recording customer contact in own organisation
- 1.4 describe the need for an authentication/validation process
- 1.5 explain the importance of informing customers on what is happening and the reasons for any constraints or limitations
- 1.6 explain the importance of clear communication with the customer to ensure understanding of expectations and agreements
- 1.7 describe the techniques for establishing a rapport with customers
- 1.8 describe how to handle abusive calls following own organisational procedures

Range

(AC1.5, **Types of customers:** eg:

- AC1.7)
- Day to day
 - Challenging
 - Impatient
 - Dissatisfied
 - Undecided
 - Language barriers
 - Special requirements

(AC1.5) **Reasons for any constraints or limitations:** eg:

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

(AC1.7) **Techniques:**

- Attitude
 - Behaviour
 - Tone
 - Empathy
 - Patience
-

Learning outcome

The learner will:

- 2 understand the legal, regulatory and ethical requirements relevant to the contact centre environment

Assessment criteria

The learner can:

- 2.1 explain the legal, regulatory and ethical requirements relevant to own role
 - 2.2 describe internal and external sources of information on legal, regulatory and ethical requirements
 - 2.3 explain the importance of working within the limits of own role
 - 2.4 explain the potential consequences of non-compliance with legal, regulatory or ethical requirements
-

Range

(AC2.1, **Legal requirements:** eg

- AC2.2,
 - Data Protection Act
- AC2.4)
 - Communications Act
 - Consumer Credit Act
 - Freedom of Information Act

(AC2.1, **Regulatory requirements:** eg

- AC2.2,
 - Telephone Preference Service
- AC2.4)
 - Ofcom regulations
 - Direct Marketing Association (DMA) Code of Practice
 - Financial Conduct Authority (FCA)
 - Information Commissioners Office (ICO)

(AC2.1, **Ethical requirements:** eg

- AC2.2,
 - Values
- AC2.4)
 - Social
 - Moral
 - Respect
 - Tolerance
-

- Code of conduct
- (AC2.2) **Internal sources of information:** eg
- Intranet
 - Shared drives
 - Human Resources department
 - Management/Team leader
 - Company handbook
 - Training manuals/ knowledge centre
- (AC2.2) **External sources of information:** eg
- Internet
 - Agencies
 - Library
- (AC2.3) **Limits of own role:**
- Responsibilities
 - Authority
-

Learning outcome

The learner will:

- 3 be able to handle calls with customers following own organisational, regulatory and legislative requirements

Assessment criteria

The learner can:

- 3.1 prepare self and organise the information and data required to handle the call(s) considering customers' possible responses
 - 3.2 use telecommunications equipment
 - 3.3 introduce self and acknowledge the customer
 - 3.4 authenticate identity of the customer, handling any discrepancies
 - 3.5 ensure self and customer understand the purpose of the call
 - 3.6 take ownership by building and maintaining a rapport with the customer
 - 3.7 remain positive and professional when circumstances are challenging
 - 3.8 give clear and concise information confirming understanding of customers' needs
 - 3.9 manage the length of the conversation
 - 3.10 record information on the conversation including the outcome and any agreed follow-up actions
-

Range

- (AC3.1. **Types of customers:** eg:
- AC3.3- 3.6, AC3.8)
- Day to day
 - Challenging
 - Impatient
 - Dissatisfied
 - Undecided
-

- Language barriers
- Special requirements

(AC3.6) **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

(AC3.10) **Follow-up actions:** For example:

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

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

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.

Simulation should not be used in this unit.

Unit level:	Level 2
GLH:	20
Unit 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:

- 1 understand the impact of external factors to the organisation

Assessment criteria

The learner can:

- 1.1 state what is meant by a PESTLE analysis
- 1.2 describe the advantages of a PESTLE analysis
- 1.3 explain the importance of keeping up to date with competitors' activities
- 1.4 describe why organisational change is important
- 1.5 describe how organisational change should be introduced

Range

(AC1.4) **Importance of organisational change to:**

- own organisation
- staff
- customer(s)

(AC1.5) **How organisational change should be introduced to:**

- own organisation
- staff
- customer(s)

Learning outcome

The learner will:

- 2 understand the service offer and the customer service supply chain

Assessment criteria

The learner can:

- 2.1 describe what is meant by a service offer
- 2.2 state the value of a 'service offer'
- 2.3 describe legislation, organisational policies and/or procedures that can limit or vary the service offer
- 2.4 describe what is meant by the customer service supply chain
- 2.5 explain the importance of the customer service supply chain

Range

(AC2.1, **Service offer:**

AC2.2,

- Service level agreement

AC2.3)

- Customer charter

(AC2.2) **Value of a service offer to:**

- Own organisation
- Staff
- Customer(s)

(AC2.5) **Importance of the customer service supply chain to:**

- Own organisation
- Staff
- Customer(s)

Learning outcome

The learner will:

- 3 understand customer loyalty

Assessment criteria

The learner can:

- 3.1 state how the achievement of the customer service offer can encourage customer loyalty
- 3.2 describe methods of attracting and retaining customers
- 3.3 describe the advantages of rewarding loyalty
- 3.4 describe the disadvantages of rewarding loyalty
- 3.5 describe methods of rewarding loyalty
- 3.6 describe the types of actions that customers are likely to perceive as adding value
- 3.7 explain why added value must be beneficial to both the customer and the organisation

Range

(AC3.3) **Advantages for:**

- Customer(s)
- Own organisation
- Staff

(AC3.4) **Disadvantages for:**

- Customer(s)
 - Own organisation
 - Staff
-

Learning outcome

The learner will:

- 4 understand methods of product(s) and/or service(s) promotion

Assessment criteria

The learner can:

- 4.1 describe what is meant by a Unique Selling Point (USP)
 - 4.2 describe what is meant by a Unique Service Offer (USO)
 - 4.3 describe ways of promoting a product(s) and/or service(s) to increase customer awareness
 - 4.4 state the strengths and weaknesses of promotional methods
 - 4.5 state the importance of 'first impressions'
 - 4.6 explain ways in which an organisation might improve its reputation
-

Range

(AC4.5) **Importance of first impressions on:**

- Customer
- Organisation
- Staff
- Reputation/Brand

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 competitors' 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, eg 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 eg 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 eg 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, eg 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 level:	Level 2
GLH:	22
Unit 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:

- 1 process payments for purchases

Assessment criteria

The learner can:

- 1.1 advise customers the correct amount to pay, taking into account any special offers or discounts that apply
- 1.2 resolve pricing problems
- 1.3 process payments in line with own organisation's procedures
- 1.4 explain how to tell customers tactfully when payment cannot be approved
- 1.5 treat customers politely throughout the payment process
- 1.6 acknowledge other customers who are waiting

Range

(AC1.1) **Special offers or discounts:** eg:

- BOGOF
- Price matching
- Staff discount
- Loyalty discount

(AC1.2) **Pricing problems:** eg:

- Unknown price
- Incorrect pricing
- Discounts
- Customer misunderstanding

(AC1.2) **Resolving pricing problems:**

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

(AC1.3) **Payments:** For example:

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

(AC1.4) **Payment cannot be approved:**

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

Learning outcome

The learner will:

- 2 accurately process returned goods

Assessment criteria

The learner can:

- 2.1 describe reasons customers might have for returning goods
 - 2.2 describe customers' legal rights to replacements and refunds
 - 2.3 describe own organisation's policy concerning replacements and refunds
 - 2.4 ask customers politely what goods they wish to return and the reason why
 - 2.5 check type, quantity and condition of returned goods
 - 2.6 offer customers replacements and refunds in accordance with legal and organisational requirements (where relevant)
 - 2.7 describe politely to customers any action that will be taken concerning the returned goods
 - 2.8 label clearly any goods that are to be returned to the supplier or manufacturer
 - 2.9 place returned goods safely to the correct location or position
-

Range

(AC2.1) **Reason for return:** For example:

- faulty/damaged
- unwanted
- exchanges

(AC2.2, **Legal rights:** For example:

- AC2.6) • Consumer Rights Act
• Consumer Credit Act

(AC2.5) **Condition of returned goods:**

- Acceptable
- Unacceptable

(AC2.6) **Organisational requirements:** For example:

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

(AC2.7) **Action:**

- Accepted
 - Not Accepted
-

- Refer to Others
-

Learning outcome

The learner will:

- 3 display stock to promote sales

Assessment criteria

The learner can:

- 3.1 explain how sales can be promoted
 - 3.2 describe the importance of correctly labelling products
 - 3.3 establish the availability of space and other resources needed
 - 3.4 identify the person(s) who can provide advice and/or assistance if any problems arise
 - 3.5 perform checks on the space available and prepare area
 - 3.6 set up a display
 - 3.7 check the finished display
 - 3.8 clear the area of any equipment/materials
-

Range

- (AC3.1) **How sales can be promoted:**
- The effective use of space in a display
 - The positioning of products within a display
- (AC3.2) **Importance of correctly labelling products:**
- Legal requirements
 - Consequences of not meeting legal requirements
- (AC3.4) **Person(s) who can provide advice and/or assistance:** For example:
- Manager
 - Supervisor
 - Colleague
- (AC3.5) **Perform checks on the space available:**
- Enough space for the display
 - the display will not cause an obstruction
- (AC3.5) **Prepare a display area:**
- Remove any items not required
 - ensure the area is safe and clean
- (AC3.6) **Set up a display:**
- using safe working practices
 - following plan
 - within the time allowed
 - minimising the inconvenience caused to others
- (AC3.7) **Check the finished display:**
- has the levels of stock needed
 - is clean and tidy
 - is safe for use
-

Learning outcome

The learner will:

- 4 check stock levels and replenish stock

Assessment criteria

The learner can:

- 4.1 describe own organisation's stock control system
- 4.2 describe the procedures for informing colleagues of stock needs
- 4.3 check stock needed to maintain required levels
- 4.4 arrange for stock to be moved to the sales floor as needed
- 4.5 rotate stock in accordance with own organisational procedures
- 4.6 dispose of packaging waste

Range

(AC4.1) **Stock control system:**

- Manual
- electronic

(AC4.6) **Disposal:**

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

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 level:	Level 2
GLH:	30
Unit 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:

- 1 understand the use of social media in a working environment

Assessment criteria

The learner can:

- 1.1 describe what is meant by social media in business
- 1.2 explain the main advantages and disadvantages of social media
- 1.3 describe the use of social media to promote products and/or services
- 1.4 identify the risks of using social media
- 1.5 describe tools used to monitor customer social media engagement

Range

(AC1.4) **Risks:** For example:

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

(AC1.5) **Tools:** For example:

- Analytics
- Likes
- Hits
- Views

Learning outcome

The learner will:

- 2 understand the safe use of social media

Assessment criteria

The learner can:

- 2.1 describe appropriate precautions that can be taken to ensure safety and privacy
- 2.2 explain why organisations, including own, have social media/networking policies
- 2.3 identify legal constraints on the uploading and downloading of digital content

Range

(AC2.3) **Digital content:**

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

Learning outcome

The learner will:

- 3 understand the need for safety and security practices

Assessment criteria

The learner can:

- 3.1 describe the danger of computer viruses and how to minimise risks
- 3.2 describe how to minimise security threats
- 3.3 describe where to access help and information when using social media

Range

(AC3.2) **Security threats:** For example:

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

Learning outcome

The learner will:

- 4 be able to demonstrate the use of social media in own organisation

Assessment criteria

The learner can:

- 4.1 identify the social media in use by own organisation
- 4.2 identify opportunities to post or publish approved material
- 4.3 post or publish approved material
- 4.4 use tools to monitor customer engagement

Range

(AC4.2, **Approved by:** For example:

- AC4.3)
- manager /owner
 - supervisor
 - marketing staff

(AC4.4) **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 level:	Level 2
GLH:	26
Unit 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:

- 1 understand how to segment the market

Assessment criteria

The learner can:

- 1.1 describe the difference between market segments and customer classifications
- 1.2 explain how to cluster customers with similar characteristics
- 1.3 describe how a range of products may appeal to different market segments
- 1.4 describe the importance of valid and reliable marketing data
- 1.5 describe different marketing data collection methods
- 1.6 describe the use of Customer Relationship Management (CRM) activities and systems

Range

(AC1.1, **Market segments:** For example:

- AC1.3)
- Age
 - Gender
 - Religion
 - Culture
 - Income
 - Lifestyle

(AC1.1) **Customer classification:**

- Business
- Non-business

(AC1.5) **Data collection methods:** Strengths and weaknesses of:

- Primary
- Secondary

Learning outcome

The learner will:

- 2 understand the value of marketing

Assessment criteria

The learner can:

- 2.1 describe the role of marketing in enhancing the sale of products and/or services
- 2.2 describe the factors to be taken into account when assessing the cost and value of marketing activities
- 2.3 explain the scope and purpose of socially responsible marketing
- 2.4 explain the importance of involving stakeholders in socially responsible marketing activities

Range

(AC2.2) **Factors:**

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

(AC2.3, **Socially responsible marketing:**

- AC2.4) • Ethical eg health, education, environmental
- Corporate social responsibility eg diversity, community responsibility

(AC2.4) **Stakeholders:** For example:

- Internal and external customers
- Investors
- Clients
- Shareholders

Learning outcome

The learner will:

- 3 be able to develop a marketing plan

Assessment criteria

The learner can:

- 3.1 conduct a SWOT analysis of a chosen product or service
 - 3.2 develop a marketing strategy agreeing with appropriate person(s)
 - 3.3 develop a marketing plan on chosen product or service
-

Range

(AC3.1) **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)

(AC3.2) **Marketing strategy:**

- Intended objective
- Intended implementation method eg Ansoff, Porter

(AC3.3) **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 eg 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 eg 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

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning Outcome and Assessment criteria
Knowledge	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: <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. 	Unit 202: 5.1-5.3 Unit 203: 5.1-5.2
	Your role and responsibility: <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
	Customer experience: <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
	Product and service knowledge: Understand the products or services that are available from your organisation and keep up-to-date.	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	<p>Interpersonal skills:</p> <p>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.</p>	<p>Unit 204: 4.2, 5.1-5.2 Unit 205: 4.3, 4.7 Unit 206: 1.1</p>
	<p>Communication:</p> <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. 	<p>Unit 205: 4.1, 4.4, 4.6-4.7 Unit 206: 1.5-1.7</p>
	<p>Influencing skills:</p> <p>Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation</p>	<p>Unit 206: 3.1-3.4, 4.1</p>
	<p>Personal organisation:</p> <p>Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines.</p>	<p>Unit 201: 2.1-2.5</p>

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 <ul style="list-style-type: none"> • 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

Knowledge/Skills/ Behaviour/Attitude	Standard Module	City & Guilds Level 2 Diploma for Customer Service Practitioners – Learning Outcome and Assessment criteria
	<p>Presentation – dress code, professional language: Demonstrate personal pride in the job through appropriate dress and positive and confident language.</p>	<p>Unit 205: 2.1-2.5</p>
	<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 **Centres and Training Providers homepage** on www.cityandguilds.com.

City & Guilds Centre Manual

This document provides guidance for organisations wishing to become City & Guilds approved centres, as well as information for approved centres delivering City & Guilds qualifications. It covers the centre and qualification approval process as well as providing guidance on delivery, assessment and quality assurance for approved centres.

It also details the City & Guilds requirements for ongoing centre and qualification approval, and provides examples of best practice for centres. Specifically, the document includes sections on:

- the centre and qualification approval process
- assessment, internal quality assurance and examination roles at the centre
- registration and certification of candidates
- non-compliance and malpractice
- complaints and appeals
- equal opportunities
- data protection
- management systems
- maintaining records
- internal quality assurance
- external quality assurance.

Our Quality Assurance Requirements

This document explains the requirements for the delivery, assessment and awarding of our qualifications. All centres working with City & Guilds must adopt and implement these requirements across all of their qualification provision. Specifically, this document:

- specifies the quality assurance and control requirements that apply to all centres
- sets out the basis for securing high standards, for all our qualifications and/or assessments
- details the impact on centres of non-compliance

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

Walled Garden: how to register and certificate candidates on line

Events: dates and information on the latest Centre events

Online assessment: how to register for e-assessments.

Appendix 3 Useful contacts



UK learners General qualification information	E: learnersupport@cityandguilds.com
International learners General qualification information	E: intcg@cityandguilds.com
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	E: centresupport@cityandguilds.com
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	E: singlesubjects@cityandguilds.com
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	E: intops@cityandguilds.com
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	E: walledgarden@cityandguilds.com
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	E: business@cityandguilds.com

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As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group is a leader in global skills development. Our purpose is to help people and organisations to develop their skills for personal and economic growth. Made up of City & Guilds, City & Guilds Kineo, The Oxford Group and ILM, we work with education providers, businesses and governments in over 100 countries.

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