LEVEL 2 IMPORTED UNITS

NVQ in Contact Centre Operations (3412)

Level 2 imported unit pack

April 2013 Version 2.0

City & Guilds

Qualification at a glance

Subject area	Contact Centre Operations
City & Guilds number	3412
Age group approved	Level 1 Award – All Level 1 Certificate – All Level 2 Certificate – All Level 3 Diploma – 16+ Level 4 Diploma – 18+
Assessment	Portfolio of evidence for each unit
Automatic Approval	Automatic approval available from 2703
Registration and certification	See Walled Garden/online catalogue for last dates

Title and level	City & Guilds number	Accreditation number
Level 1 Award in Contact Centre Operations	3412-01	600/1244/4
Level 1 Certificate in Contact Centre Operations	3412-02	600/1286/9
Level 2 Certificate in Contact Centre Operations	3412-03	600/1135/X
Level 3 Diploma in Contact Centre Operations	3412-04	600/1136/1
Level 4 Diploma in Contact Centre Operations	3412-05	600/1288/2

Version and date	Change detail	Section
2.0 Apr 2013	Correct credit value – Unit 229	**Introduction / Units**

Contents

1	**Introduction**	**4**
	List of imported units	4
Unit 208	**Give customers a positive impression of yourself and your organisation**	**6**
Unit 209	**Promote additional services or products to customers**	**9**
Unit 210	**Process information about customers**	**13**
Unit 211	**Deal with incoming telephone calls from customers**	**16**
Unit 212	**Deal with customers using bespoke software**	**20**
Unit 213	**Maintain customer service through effective handover**	**23**
Unit 214	**Resolve customer service problems**	**26**
Unit 215	**Deliver customer service to difficult customers**	**29**
Unit 216	**Support customers using on-line customer services**	**33**
Unit 217	**Buddy a colleague to develop their customer service skills**	**36**
Unit 218	**Develop your own customer service skills through self-study**	**40**
Unit 219	**Follow the rules to deliver customer service**	**43**
Unit 220	**Bespoke software**	**46**
Unit 221	**Using email**	**50**
Unit 222	**Using the Internet**	**54**
Unit 223	**Using collaborative technologies**	**60**
Unit 224	**IT communication fundamentals**	**66**
Unit 225	**Time planning in sales**	**68**
Unit 226	**Selling by telephone (inbound)**	**70**
Unit 227	**Selling by telephone (outbound)**	**73**
Unit 228	**Inputting and accessing sales or marketing data in information systems**	**76**
Unit 229	**Handling objections and closing sales**	**78**
Appendix 1	**Sources of general information**	**80**

1 Introduction

This document contains imported units available within the following qualifications:

Title and level	City & Guilds number	Accreditation number
Level 1 Award in Contact Centre Operations	3412-01	600/1244/4
Level 1 Certificate in Contact Centre Operations	3412-02	600/1286/9
Level 2 Certificate in Contact Centre Operations	3412-03	600/1135/X
Level 3 Diploma in Contact Centre Operations	3412-04	600/1136/1

For full information on the 3412 qualification and for the qualification handbook containing the contact centre specific units see **www.cityandguilds.com**

List of imported units

The following table shows a full list of the imported units for all five Contact Centre NVQ's and indicates in which qualification each exists.

For full structures and rules of combination for each of the qualifications please see the qualification handbook which can be found on the City & Guilds website **www.cityandguilds.com**

UAN	City & Guilds unit	Unit title	Level	GLH	Credit value	L1 Award	L1 Cert	L2 Cert	L3 Dip	L4 Dip
L/601/0933	208	Give customers a positive impression of yourself and your organisation	2	33	5			✓		
D/601/0936	209	Promote additional services or products to customers	2	40	6			✓		
H/601/1215	210	Process information about customers	2	33	5			✓		
F/601/1223	211	Deal with incoming telephone calls from customers	2	33	5			✓		
L/601/1225	212	Deal with customers using bespoke software	2	33	5			✓	✓	
Y/601/1227	213	Maintain customer service through effective hand over	2	27	4			✓	✓	
M/601/1511	214	Resolve customer service problems	2	40	6			✓		

UAN	City & Guilds unit	Unit title	Level	GLH	Credit value	L1 Award	L1 Cert	L2 Cert	L3 Dip	L4 Dip
T/601/1512	215	Deliver customer service to difficult customers	2	40	6			✓		
H/601/1540	216	Support customers using on-line customer services	2	33	5			✓	✓	
M/601/1542	217	Buddy a colleague to develop their customer service skills	2	33	5			✓	✓	
R/601/1548	218	Develop your own customer service skills through self-study	2	40	6	✓	✓	✓	✓	
L/601/1614	219	Follow the rules to deliver customer service	2	30	4			✓		
F/502/4396	220	Bespoke software	2	20	3			✓		
M/502/4300	221	Using Email	2	20	3			✓	✓	
A/502/4297	222	Using the Internet	2	30	4			✓	✓	
F/502/4379	223	Using Collaborative Technologies	2	30	4			✓	✓	
D/502/4292	224	IT Communication Fundamentals	2	15	2			✓	✓	
F/502/8559	225	Time planning in sales	2	13	2			✓		
J/502/8577	226	Selling by telephone (in-bound)	2	27	4	✓	✓	✓		
J/502/8580	227	Selling by telephone (out-bound)	2	27	4	✓	✓	✓		
D/502/8584	228	Inputting and accessing sales or marketing data in information systems	2	15	2			✓		
M/502/8606	229	Handling objections and closing sales	2	22	3			✓	✓	

The units follow in City & Guilds unit number order.

Unit 208 Give customers a positive impression of yourself and your organisation

Level: 2
Credit value: 5
UAN: L/601/0933

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to establish rapport with customers
2. Be able to respond appropriately to customers
3. Be able to communicate information to customers
4. Understand how to give customers a positive impression of themselves and the organisation

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 208 Give customers a positive impression of yourself and your organisation

Learning outcomes and assessment criteria

Outcome 1: Be able to establish rapport with customers

The learner can:

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

Outcome 2: Be able to respond appropriately to customers

The learner can:

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

Outcome 3: Be able to communicate information to customers

The learner can:

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

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

The learner can:

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

Unit 208 Give customers a positive impression of yourself and your organisation

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your communication with customers may be face to face, in writing, by telephone, text message, Email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

5 You must provide evidence of creating a positive impression with customers:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

6 You must provide evidence that you communicate with customers effectively by:

- a using appropriate spoken or written language
- b applying the conventions and rules appropriate to the method of communication you have chosen.

Unit 209 Promote additional services or products to customers

Level: 2
Credit value: 6
UAN: D/601/0936

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to identify additional services or products that are available
2. Be able to inform customers about additional services or products
3. Be able to gain customer commitment to using additional services or products
4. Understand how to promote additional services or products to customers

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 209 Promote additional services or products to customers

Learning outcomes and assessment criteria

Outcome 1: Be able to identify additional services or products that are available

The learner can:

1.1 update and develop their knowledge of their organisation's services or products

1.2 check with others when they are unsure about new service or product details

1.3 identify appropriate services or products that may interest their customer

1.4 spot opportunities for offering their customer additional services or products that will improve the customer experience

Outcome 2: Be able to inform customers about additional services or products

The learner can:

2.1 choose the best time to inform their customer about additional services or products

2.2 choose the best method of communication to introduce their customer to additional services or products

2.3 give their customer accurate and sufficient information to enable them to make a decision about the additional services or products

2.4 give their customer time to ask questions about the additional services or products

Outcome 3: Be able to gain customer commitment to using additional services or products

The learner can:

3.1 close the conversation if the customer shows no interest

3.2 give information to move the situation forward when their customer shows interest

3.3 secure customer agreement and check customer understanding of the delivery of the service or product

3.4 take action to ensure prompt delivery of the additional services or products to their customer

3.5 refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility

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

The learner can:

4.1 describe the organisation's procedures and systems for encouraging the use of additional services or products

4.2 explain how additional services or products will benefit their customers

4.3 explain how their customer's use of additional services or products will benefit their organisation

4.4 identify the main factors that influence customers to use their services or products

4.5 explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products

4.6 state how to give appropriate, balanced information to customers about services or products

Unit 209 Promote additional services or products to customers

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your communication with customers may be face to face, in writing, by telephone, text message, Email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

5 You must provide evidence that the additional services or products offered include:

- a use of services or products that are new to your customer
- b additional use of services or products that your customer has used before.

6 Your evidence must show that you:

- a identify what your customer wants by seeking information directly
- b identify what your customer wants from spontaneous customer comments.

Unit 210 Process information about customers

Level: 2
Credit value: 5
UAN: H/601/1215

Unit aim

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

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

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

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to collect information about customers
2. Be able to select and retrieve information about customers
3. Be able to supply information about customers
4. Understand how to process customer service information

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 210 Process information about customers

Learning outcomes and assessment criteria

Outcome 1: Be able to collect information about customers

The learner can:

1.1 collect and record new information about customers following the organisation's guidelines

1.2 update existing information about customers

1.3 record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

Outcome 2: Be able to select and retrieve information about customers

The learner can:

2.1 respond promptly to authorised requests for information about customers

2.2 select and retrieve relevant information for customers or colleagues following the organisation's guidelines

Outcome 3: Be able to supply information about customers

The learner can:

3.1 supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations

3.2 choose the most appropriate way to supply information to their customers or colleagues

3.3 confirm that their customers or colleagues have received and understood the customer information

Outcome 4: Understand how to process customer service information

The learner can:

4.1 describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers

4.2 identify types of personal information about customers that should and should not be kept on record

4.3 explain how to collect information about customers efficiently and effectively

4.4 explain how to operate the customer information storage system

4.5 explain why processing information about customers correctly makes an important contribution to effective customer service

4.6 explain the importance of attention to detail when processing information about customers

4.7 describe legal and regulatory restrictions on the storage and use of customer data

Unit 210 Process information about customers

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your communication with customers may be face to face, in writing, by telephone, text message, Email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

5 You must provide evidence that you have processed information relating to:

- a new customers
- b existing customers.

6 Your evidence must show that you have:

- a checked whether the information you are collecting and retrieving is accurate and up-to-date
- b selected information that is directly relevant to each of your customers.

Unit 211 Deal with incoming telephone calls from customers

Level: 2
Credit value: 5
UAN: F/601/1223

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to use communication systems effectively
2. Be able to establish rapport with customers who are calling
3. Be able to deal effectively with customer questions and requests
4. Know how to deal with incoming telephone calls from customers

Guided learning hours

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

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

This unit directly relates to Unit A11of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 211 Deal with incoming telephone calls from customers

Learning outcomes and assessment criteria

Outcome 1: Be able to use communication systems effectively

The learner can:

1.1 operate telecommunication equipment efficiently and effectively

1.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer

1.3 listen carefully when collecting information from their customer

1.4 select the information they need to record and store following their organisation's guidelines

1.5 update their customer records during or after the call to reflect the key points of the conversation

Outcome 2: Be able to establish rapport with customers who are calling

The learner can:

2.1 greet their customer following their organisation's guidelines

2.2 listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call

2.3 confirm the identity of their customer following organisational guidelines

2.4 use effective and assertive questions to clarify their customer's requests

Outcome 3: Be able to deal effectively with customer questions and requests

The learner can:

3.1 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each

3.2 choose the option that is most likely to lead to customer satisfaction within the service offer

3.3 give clear and concise information to customers in response to questions or requests

3.4 use questions and answers to control the length of the conversation

3.5 keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time

3.6 put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague

3.7 summarise the outcome of the call and any actions that they or their customer will take as a result

3.8 check before the call is finished that their customer is content that all their questions or requests have been dealt with

3.9 complete any follow up actions agreed during the call

3.10 take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests

3.11 ensure that promises to call back are kept

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

The learner can:

4.1 describe their organisation's guidelines and procedures for the use of telecommunication equipment

4.2 explain how to operate the organisation's telecommunication equipment

4.3 explain the importance of speaking clearly and slowly when dealing with customers by telephone

4.4 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone

4.5 explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand

4.6 identify what information is important to note during or after telephone conversations with customers

4.7 describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers

4.8 explain the importance of keeping their customer informed if they are on hold during a call

4.9 explain the importance of not talking across an open line

4.10 list details that should be included if taking a message for a colleague

4.11 describe their organisation's guidelines and procedures for taking action to follow up calls made to customers

4.12 describe their organisation's guidelines for handling abusive calls

Unit 211 Deal with incoming telephone calls from customers

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

5 Your evidence must include examples of dealing with customers who:
- a have standard expectations of your organisation's customer service
- b have experienced difficulties when dealing with your organisation
- c have made a specific request for information
- d need to be informed of circumstances of which they are unaware.

6 Your evidence must include examples of dealings with customers that are:
- a planned
- b unplanned.

7 You must provide evidence of dealing with customers by telephone:
- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

8 You must provide evidence that you have taken messages that are passed on to colleagues:
- a verbally
- b in a form that maintains a permanent record.

Unit 212 Deal with customers using bespoke software

Level: 2
Credit value: 5
UAN: L/601/1225

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to prepare to deliver customer service using bespoke software
2. Be able to deliver customer service using bespoke software
3. Understand how to deal with customers using bespoke software

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 212 Deal with customers using bespoke software

Learning outcomes and assessment criteria

Outcome 1: Be able to prepare to deliver customer service using bespoke software

The learner can:

1.1 sign on and open access to appropriate functions in the IT system

1.2 navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas

1.3 explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver

1.4 ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed

1.5 prepare their work area to deliver customer service using bespoke software

Outcome 2: Be able to deliver customer service using bespoke software

The learner can:

2.1 identify their customer or the services or products they wish to access

2.2 follow organisational procedures to step through the system in a way that responds to their customer's needs

2.3 use search or other specialist functions within the software to respond to customer requests

2.4 enter new records using the bespoke software system

2.5 amend customer service records in the bespoke software system

2.6 communicate with their customers in terms they can understand relating to the software system

2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software

2.8 interpret error messages and act on them to support their customer service

2.9 refer their customer to a colleague following organisational procedures if they are unable to complete the transaction

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

The learner can:

3.1 describe access and sign-on routines for the bespoke software system

3.2 describe the architecture and geography of the bespoke software system

3.3 identify different screen or menu routes that can be followed to meet customer requirements

3.4 identify sources of support and help for the bespoke software including manuals, help screens and help lines

3.5 explain the importance of preparing a work area before delivering customer service

3.6 explain search or other enquiry facilities within the bespoke software system

3.7 state the importance of avoiding jargon and system terminology when communicating with customers

3.8 describe ways to respond to error messages when using a bespoke software system

3.9 identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system

Unit 212 Deal with customers using bespoke software

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your communication with customers may be face to face, in writing, by telephone, text message, Email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

5 You must provide evidence of dealing with customers using bespoke software:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

Unit 213 Maintain customer service through effective handover

Level: 2
Credit value: 4
UAN: Y/601/1227

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to agree joint responsibilities in a customer service team
2. Be able to check that customer service actions are seen through by working together with colleagues
3. Understand how to maintain customer service through effective handover

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 213 Maintain customer service through effective handover

Learning outcomes and assessment criteria

Outcome 1: Be able to agree joint responsibilities in a customer service team

The learner can:

1.1 identify services or products they are involved in delivering that rely on effective teamwork

1.2 identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues

1.3 agree with colleagues when it is right to pass responsibility for completing a customer service action to another

1.4 agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action

1.5 identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action

Outcome 2: Be able to check that customer service actions are seen through by working together with colleagues

The learner can:

2.1 access reminders to identify when to check that a customer service action has been completed

2.2 ensure that they are aware of all details of customer service actions their colleague was due to complete

2.3 ask their colleague about the outcome of them completing the customer service action as agreed

2.4 identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed

2.5 work with colleagues to review the way in which customer service actions are shared

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

The learner can:

3.1 explain their organisation's customer service procedures for the services or products they are involved in delivering

3.2 identify the appropriate colleagues to pass responsibility to for completing particular customer service actions

3.3 describe ways of ensuring that information is passed between them and their colleagues effectively

3.4 identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague

3.5 explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting

3.6 identify opportunities for contributing to review the way customer service actions are shared in customer service processes

Unit 213 Maintain customer service through effective handover

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 You must provide evidence of maintaining customer service through effective hand over:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

5 You do not need to be more senior than your colleague or be their supervisor to pass on responsibility to them for customer service actions or check completion.

Unit 214 Resolve customer service problems

Level: 2
Credit value: 6
UAN: M/601/1511

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to spot customer service problems
2. Be able to pick the best solution to resolve customer service problems
3. Be able to take action to resolve customer service problems
4. Know how to resolve customer service problems

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 214 Resolve customer service problems

Learning outcomes and assessment criteria

Outcome 1: Be able to spot customer service problems

The learner can:

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

Outcome 2: Be able to pick the best solution to resolve customer service problems

The learner can:

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

Outcome 3: Be able to take action to resolve customer service problems

The learner can:

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

Outcome 4: Know how to resolve customer service problems

The learner can:

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

Unit 214 Resolve customer service problems

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your evidence must include examples of resolving problems involving each of the following:

- a a problem first identified by customers
- b a problem identified within the organisation before it has affected your customer
- c a problem caused by differences between your customer's expectations and what your organisation can offer
- d a problem caused by a system or procedure failure
- e a problem caused by a lack of resources or human error.

5 You must provide evidence that you:

- a supplied relevant information when customers have requested it
- b supplied relevant information when customers have not requested it
- c have used agreed organisational procedures when solving problems
- d have made exceptions to usual practice with the agreement of others.

Unit 215 Deliver customer service to difficult customers

Level: 2
Credit value: 6
UAN: T/601/1512

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to recognise when customers may be difficult to deal with
2. Be able to deal with difficult customers
3. Understand how to deliver customer service to difficult customers

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 215 Deliver customer service to difficult customers

Learning outcomes and assessment criteria

Outcome 1: Be able to recognise when customers may be difficult to deal with

The learner can:

1.1 recognise types of customer behaviour that are difficult to deal with

1.2 identify aspects of their organisation's services or products that make it difficult to deal with customers

1.3 identify the signs and signals that indicate a customer may be difficult to deal with

1.4 put themself in their customer's position and see the situation from the customer's point of view

1.5 identify reasons why their customers may be behaving in a way that is difficult to deal with

1.6 recognise the limits of difficult customer behaviour that their organisation will tolerate

1.7 identify things that they may do or say that will provoke difficult responses from their customer

Outcome 2: Be able to deal with difficult customers

The learner can:

2.1 listen patiently to what their customer wants to tell them

2.2 use direct and factual questions about their customer's feelings and what has happened to identify what might satisfy the customer

2.3 check their understanding of their customer's concerns by describing their view of the situation and options that might be available

2.4 express empathy with their customer without necessarily admitting fault on the part of their organisation

2.5 give clear statements or explanations of their organisation's position

2.6 agree a way forward that balances customer satisfaction with the needs of their organisation

2.7 enlist help from colleagues if options for action are outside of their authority

2.8 summarise clearly actions to be taken and reasons for those actions to complete the customer transaction

2.9 advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them

2.10 take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer

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

The learner can:

3.1 describe the types of customer behaviour that they personally find difficult to deal with

3.2 identify reasons why some aspect of their organisation's services or products may provoke difficult behaviour from customers

3.3 identify reasons why their customer's own actions may cause them to behave in a way that is difficult to deal with

3.4 explain the meaning of having empathy for a customer's feelings

3.5 identify who can be asked for help when dealing with a difficult customer

3.6 explain the difference between assertive, aggressive and passive behaviour

3.7 describe the importance of not simply quoting their organisation's rules and procedures to counter their customer's difficult behaviour

3.8 state their organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed

3.9 explain the importance of giving their manager or the appropriate colleagues notice of any further approaches from a difficult customer

3.10 identify when it might be necessary to take action to protect their own safety or that of other customers or colleagues from a difficult customer

Unit 215 Deliver customer service to difficult customers

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 You must provide evidence of delivering customer service to difficult customers:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

Unit 216 Support customers using on-line customer services

Level: 2
Credit value: 5
UAN: H/601/1540

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

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

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 216 Support customers using on-line customer services

Learning outcomes and assessment criteria

Outcome 1: Be able to establish the type and level of support their customer needs to achieve on-line customer service

The learner can:

1.1 ensure that they are up-to-date and with the on-line services that their customers use

1.2 identify what the customer is trying to achieve and what they are having difficulties with

1.3 question their customer to discover the customer's degree of familiarity with the system

1.4 offer their customer the option of trying the on-line approach once more

1.5 agree with their customer the exact nature of the problem and steps that may be taken to overcome it

Outcome 2: Be able to support on-line customer service in conversation with their customer

The learner can:

2.1 explore the on-line customer system in order to develop their own knowledge and skills in its use

2.2 step through the screen sequence with their customer whilst allowing them to operate the system for themselves

2.3 address their customer in an understanding and supportive manner

2.4 explain to their customer why certain steps are required in the process

2.5 offer the options to their customer of stepping them through the process or completing the transaction themselves

2.6 promote access to additional services or products when supporting customers on-line

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

The learner can:

3.1 explain how their organisation's system for on-line service delivery works

3.2 describe the importance of close active listening to discover what their customer is trying to achieve

3.3 identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system

3.4 explain why it is generally preferable for their customer to complete a transaction for themselves

3.5 explain the importance of building customer confidence in using the on-line system by supporting and encouraging

3.6 compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves

3.7 identify additional services or products that may be promoted to on-line customers

Unit 216 Support customers using on-line customer services

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 You must provide evidence of supporting customers who are:

- a new to the use of on-line services for this particular purpose
- b familiar with the use of on-line services for this particular purpose

5 Your evidence must include examples of helping customers with difficulties caused by:

- a the customer's use of the on-line services
- b a system or equipment failure.

Unit 217 Buddy a colleague to develop their customer service skills

Level: 2
Credit value: 5
UAN: M/601/1542

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

1. Be able to plan and prepare to buddy a colleague
2. Be able to support their buddy colleague on the job
3. Be able to provide buddy support off the job
4. Know how to buddy a colleague to develop their customer service skills

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 217 Buddy a colleague to develop their customer service skills

Learning outcomes and assessment criteria

Outcome 1: Be able to plan and prepare to buddy a colleague

The learner can:

1.1 agree with their colleague aspects of the colleague's work which may benefit most from their buddying support

1.2 confirm their understanding of their colleague's job tasks and responsibilities using reliable sources

1.3 clarify the customer service image and impression their colleague should present in their job

1.4 arrange times when it will be most helpful to work alongside their colleague

1.5 plan details of a buddy session to support their colleague on the job

Outcome 2: Be able to support their buddy colleague on the job

The learner can:

2.1 agree with their colleague where they will be placed near them when buddying them on the job

2.2 ensure their presence when their buddy is dealing with customers does not detract from effective customer service

2.3 carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow

2.4 observe their colleague closely to identify what they do well and areas in which they could improve

2.5 discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement

2.6 praise their colleague on aspects of work which they have carried out well

2.7 explain to their colleague ways in which they can improve their customer service performance

2.8 make notes on their colleague's strengths and areas for development that they can discuss with their colleague

Outcome 3: Be able to provide buddy support off the job

The learner can:

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

3.2 identify areas of general interest that help to establish rapport with their buddy colleague

3.3 use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance

3.4 agree actions their buddy colleague can take to improve their customer service performance

3.5 offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience

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

The learner can:

4.1 identify the tasks in their buddy colleague's job

4.2 identify areas of the job that benefit most from buddying support

4.3 describe the customer service image and impression that should be presented in their buddy colleague's job

4.4 identify the best times at which to work alongside their buddy colleague

4.5 identify ways to work alongside their buddy colleague without intruding on the customer relationship.

4.6 describe techniques for giving positive feedback and constructive criticism to their buddy colleague

4.7 explain the importance of establishing an effective rapport with their buddy colleague

4.8 review options for actions their buddy colleague can take to improve their customer service performance

Unit 217 Buddy a colleague to develop their customer service skills

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 You must provide evidence of buddying a colleague to develop their customer service skills:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

Unit 218 Develop your own customer service skills through self-study

Level: 2
Credit value: 6
UAN: R/601/1548

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to find ways to learn more about customer service and their job
2. Be able to use sources of self-development to extend their customer service skills and knowledge
3. Know how to develop their own customer service skills through self-study

Guided learning hours

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

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

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

Support of the unit by a sector or other appropriate body

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

Assessment

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

Unit 218 Develop your own customer service skills through self-study

Learning outcomes and assessment criteria

Outcome 1: Be able to find ways to learn more about customer service and their job

The learner can:

1.1 identify different sources of information and support that will help them to develop their customer service knowledge and skills

1.2 agree with their line manager, their mentor or others doing a similar job the best sources to use for self-development of their customer service knowledge and skills

1.3 take action to remind themselves to check on sources of information and support

1.4 search for additional sources of information to support their customer service learning

1.5 store materials that support self-study for future use

1.6 plan time to study the self-study materials they have collected

Outcome 2: Be able to use sources of self-development to extend their customer service skills and knowledge

The learner can:

2.1 access organisational update information to extend their knowledge of products and services

2.2 access organisational information to learn more about the way their role contributes to customer service

2.3 monitor publications to identify ideas and new developments in customer service which they could apply in their work

2.4 study collected information to develop their own customer service knowledge and skills

2.5 take action resulting from their learning to change the way they deal with customers

2.6 share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for further options

2.7 record actions they take to learn more about customer service and identify those which have the most positive effects

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

The learner can:

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

3.2 identify sources of information about customer service knowledge and skills that will help them to develop

3.3 list ways to store information that they use to develop their customer service skills

3.4 describe the importance of focus when self-studying to improve their customer service knowledge and skills

3.5 identify ways to convert information or ideas they have found through self-study into practical customer service actions

3.6 identify the value of discussing their learning with their line manager, their mentor or others doing a similar job

3.7 evaluate methods of recording actions to improve their customer service skills which have had positive effects

Unit 218 Develop your own customer service skills through self-study

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 Your evidence must show that you have taken personal responsibility for identifying, locating and using learning materials with only limited guidance and support from your line manager, mentor or colleagues.

5 The information sources and learning materials referred to in your evidence may be any or all of the following:

- a paper based
- b on-line or other electronic media
- c structured discussions.

Unit 219 Follow the rules to deliver customer service

Level: 2
Credit value: 4
UAN: L/601/1614

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

Learning outcomes
There are **two** learning outcomes to this unit. The learner will:
1. Be able to follow their organisation's customer service practices and procedures
2. Know how to follow the rules to deliver customer service

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

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit F2 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body
This unit has been developed by the Institute of Customer Service.

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

Unit 219 Follow the rules to deliver customer service

Learning outcomes and assessment criteria

Outcome 1: Be able to follow their organisation's customer service practices and procedures

The learner can:

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

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

The learner can:

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

Unit 219 Follow the rules to deliver customer service

Evidence requirements

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

2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4 The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

5 You must provide evidence of following the rules to deliver customer service:

- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down

Unit 220 Bespoke software

Level: 2
Credit value: 3
UAN: F/502/4396

Unit aims
This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

On completion of this unit a candidate should be able to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Bespoke software tools and techniques will be defined as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step; and
- the user will take some responsibility for inputting, manipulating and outputting the information.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1. Be able to input and combine information using bespoke applications
2. Be able to use appropriate structures to organise and retrieve information efficiently
3. Be able to use the functions of the software effectively to process and present information

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 2 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.

Assessment
This unit will be assessed by:

- an assignment
- portfolio of evidence – classroom or work based
- professional discussion
- expert witness
- scenario

Unit 220 Bespoke software

Learning outcomes and assessment criteria

Outcome 1 Be able to input and combine information using bespoke applications

The learner can:

1.1 input relevant information accurately so that it is ready for processing

1.2 select and use appropriate techniques to link and combine information of different forms or from different sources within the software

1.3 respond appropriately to data entry error messages

Outcome 2 Be able to use appropriate structures to organise and retrieve information efficiently

The learner can:

2.1 describe what functions to apply to structure and layout information effectively

2.2 select and use appropriate structures and/or layouts to organise information

2.3 apply local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3 Be able to use the functions of the software effectively to process and present information

The learner can:

3.1 select and use appropriate tools and techniques to edit, process and format information

3.2 check information meets needs, using IT tools and making corrections as necessary

3.3 select and use appropriate methods to present information

Unit 220 Bespoke software

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Be able to input and combine information using bespoke applications

The learner should be able to and understand:

- Types of bespoke information:
    - information will vary according to the software for example:
        - text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables
- Inputting information:
    - inputting tools and techniques will vary according to the technology being used for example:
        - interface devices (e.g. keyboard, mouse, stylus, touch screen)
        - microphone (e.g. headset, built-in)
        - camera (e.g. web cam, video camera, mobile phone camera)
- Combining information techniques:
    - insert, size, position, wrap, order, group, import data, links and references to external data

Outcome 2 Be able to use appropriate structures to organise and retrieve information efficiently

The learner should be able to and understand:

- Structures and layouts:
    - apply and change existing templates, set up templates for inputting or retrieving information, apply or change existing styles
- Guidelines for the storage and use of data:
    - set by employer or organisation or centre
    - policies relating to security, backup and data protection
    - guidelines for data format
    - compliance, audit and reporting requirements
    - file management will vary according to the application

Outcome 3 Be able to use the functions of the software effectively to process and present information

The learner should be able to and understand:

- Editing, analysis and formatting techniques:
    - techniques will vary according to the software and task, for example:
        - **editing:** select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
        - **analysis:** design queries, mathematical, logical or statistical functions
        - **formatting:** characters, lines, paragraphs, pages, file type
- Check information:
    - checks will vary according to the type of information and software, but could include:
        - spell check, grammar check
        - accuracy of figures
        - labelling and size of images
        - volume of sound
        - quality of images and sound
        - line, paragraph and page breaks fall appropriately
        - formatting is consistent
        - the use of headings and subheadings aid clarity
        - the placing of images or sound clips
- Presentation methods:
    - methods will vary according to the software and task, for example:
        - on screen display, publishing on a web site, hard copy print out, digital file, organisational house style, branding

Unit 221 Using email

Level: 2
Credit value: 3
UAN: M/502/4300

Unit aims
This is the ability to make the best use of email software to safely and securely send, receive and store messages.

On completion of this unit a candidate should be able to understand and make effective use of a range of intermediate email software tools to send, receive and store messages for at times non-routine or unfamiliar activities.

Email tools and techniques will be defined as 'intermediate' because:

- the techniques required will involve a number of steps and at times be non-routine or unfamiliar.
- the software tools and functions will be at times non-routine or unfamiliar; and

Examples of context: Adding a signature to emails; changing settings to deal with junk mail effectively

Learning outcomes
There are **two** learning outcomes to this unit. The learner will:

1. Be able to use email software tools and techniques to compose and send messages
2. Be able to manage incoming email effectively

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 2 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.

Assessment
This unit will be assessed by:

- an assignment
- portfolio of evidence – classroom or work based
- professional discussion
- expert witness
- scenario

Unit 221 Using email

Learning outcomes and assessment criteria

Outcome 1 Be able to use email software tools and techniques to compose and send messages

The learner can:

1.1 select and use software tools to compose and format email messages, including attachments

1.2 determine the message size and how it can be reduced

1.3 send email messages to individuals and groups

1.4 describe how to stay safe and respect others when using email

1.5 use an address book to organise contact information

Outcome 2 Be able to manage incoming email effectively

The learner can:

2.1 follow guidelines and procedures for using email

2.2 read and respond to email messages appropriately

2.3 use email software tools and techniques to automate responses

2.4 describe how to archive email messages, including attachments

2.5 organise, store and archive email messages effectively

2.6 respond appropriately to email problems

Unit 221 Using email

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Be able to use email software tools and techniques to compose and send messages

The learner should be able to and understand:

- Compose and format Email:
    - format text (font, size, colour)
    - format paragraphs (alignment, bullets, numbered list), spell check, priority
    - format (rtf, plain text, html), draft, signature, page set up, backgrounds, sound, movie, hyperlink, work on- and offline
- Message size:
    - managing attachments
    - mailbox restrictions
    - methods to reduce size
- Send Email:
    - to, from, cc, bcc, subject
    - reply, reply all, forward, distribution list, reply with history
    - options, set message flags for priority, confidentiality, response request, vote
- Staying safe:
    - avoid inappropriate disclosure of personal information
    - avoid misuse of images
    - use appropriate language, respect confidentiality
    - use copy lists with discrimination
- Address book:
    - add, edit, delete contact entries
    - contacts list, distribution list, sort, display selected fields

Outcome 2 Be able to manage incoming email effectively

The learner should be able to and understand:

- Guidelines and procedures:
    - set by employer or organisation, security, copyright
    - netiquette
    - password protection
- Email responses:
    - decide on priorities, gather information needed to respond, decide when and who to copy in, what to do about attachments
- Automate responses:
    - rules, automatic replies, changing settings to deal with junk mail, out of office

- Organise and store Email:
    - folders, subfolders, delete unwanted messages, backup, address lists, move after sending, rules, archive folders; attachments, file compression
- Email problems:
    - due to message size or number of attachments, messages from unknown users (SPAM, junk, chain-mails, 'phishing'), viruses, messages intended to cause problems, mailbox full

Unit 222 Using the Internet

Level: 2
Credit value: 4
UAN: A/502/4297

Unit aims
This is the ability to set up and use appropriate connection methods to access the Internet; make the best use of browser software tools and techniques to search for, retrieve and exchange information using a browser or public search engine, and work safely and securely online.

On completion of this unit a candidate should be able to understand and make effective use of a connection method and intermediate Internet software tools and techniques to search for and exchange information for at times non-routine or unfamiliar activities.

Internet tools and techniques will be defined as 'intermediate' because:

- the software tools and functions will be at times non-routine or unfamiliar; and
- the range of techniques used for searching and exchanging information will involve a number of steps and at times be non-routine or unfamiliar.

Examples of context: customising a browser to alter the homepage and display data feeds from selected news sites

Learning outcomes
There are **five** learning outcomes to this unit. The learner will:

1. Be able to connect to the internet
2. Be able to use browser software to navigate web pages
3. Be able to use browser tools to search for information from the internet
4. Be able to use browser software to communicate information online
5. Understand the need for safety and security practices when working online

Guided learning hours
It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 2 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.

Assessment

This unit will be assessed by:

- an assignment
- portfolio of evidence – classroom or work based
- professional discussion
- expert witness
- scenario

Unit 222 Using the Internet

Learning outcomes and assessment criteria

Outcome 1 Be able to connect to the internet

The learner can:

1.1 identify different types of connection methods that can be used to access the Internet
1.2 identify the benefits and drawbacks of the connection method used
1.3 get online with an Internet connection
1.4 use help facilities to solve Internet connection problems

Outcome 2 Be able to use browser software to navigate web pages

The learner can:

2.1 select and use browser tools to navigate webpages
2.2 identify when to change browser settings to aid navigation
2.3 adjust browser settings to optimise performance and meet needs
2.4 identify ways to improve the performance of a browser

Outcome 3 Be able to use browser tools to search for information from the internet

The learner can:

3.1 select and use appropriate search techniques to locate information efficiently
3.2 describe how well information meets requirements
3.3 manage and use references to make it easier to find information another time
3.4 download, organise and store different types of information from the Internet

Outcome 4 Be able to use browser software to communicate information online

The learner can:

4.1 identify opportunities to create, post or publish material to websites
4.2 select and use appropriate tools and techniques to communicate information online
4.3 use browser tools to share information sources with others
4.4 submit information online

Outcome 5 Understand the need for safety and security practices when working online

The learner can:

5.1 describe the threats to system performance when working online
5.2 work responsibly and take appropriate safety and security precautions when working online
5.3 describe the threats to information security when working online
5.4 manage personal access to online sources securely
5.5 describe the threats to user safety when working online
5.6 describe how to minimise internet security risks
5.7 apply laws, guidelines and procedures for safe and secure Internet use
5.8 explain the importance of the relevant laws affecting Internet users

Unit 222 Using the Internet

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Be able to connect to the internet

The learner should be able to and understand:

- Connection methods:
    - LAN, VPN, modem, router, wireless, dial-up, broadband
    - cable, DSL; mobile phone with wireless application protocol (WAP) or 3rd generation (3G) technology
    - intranet server (e.g. via parallel, serial or USB connections)
- Benefits and drawbacks of connection methods:
    - speed, stability, services offered by ISP, accessibility

Outcome 2 Be able to use browser software to navigate web pages

The learner should be able to and understand:

- Browser tools:
    - enter, back, forward, refresh, stop, history, bookmark, new tab
    - toolbar, search bar, address bar
    - home, go to, follow link, URL, save web address
- Browser settings:
    - homepage, autofill, cookies, security, pop-ups, appearance, privacy, search engine, zoom, personalisation, accessibility
    - software updates, temporary file storage
- Browser performance:
    - delete cache, delete temporary files, work offline, save websites

Outcome 3 Be able to use browser tools to search for information from the internet

The learner should be able to and understand:

- Search techniques:
    - search key words, quotation marks, search within results, relational operators, 'find' or search tool, turn questions into key words for an online query
    - choice of search engine, multiple search criteria, logical operators, wild cards
- Information requirements:
    - recognise intention and authority of provider, currency of the information, relevance, accuracy, bias, level of detail, sufficiency, synthesise information from a variety of sources

- References:
    - history, favourites, bookmarks
    - links, log useful sites, RSS, data feeds, saved search results;
- Download information:
    - webpage, website
    - images, text, numbers, sound, games, video, TV, music

Outcome 4 Be able to use browser software to communicate information online

The learner should be able to and understand:

- Communicate information:
    - saved information (pod-casts, text, images), real time information (blogs, instant messaging), file transfer protocol [FTP], hypertext transmission protocol [http]
    - VOIP
- Share information sources:
    - send link, send webpage, reference lists
- Submit information:
    - fill-in and submit web forms; ratings, reviews, recommendations
    - wikis, discussion forums; interactive sites
    - netiquette

Outcome 5 Understand the need for safety and security practices when working online

The learner should be able to and understand:

- Threats to system performance:
    - unwanted Email (often referred to as “spam”), malicious programs (including viruses, worms, Trojans, spyware, adware and rogue diallers) and hackers
    - hoaxes
- Safety precautions:
    - firewall settings, Internet security settings
    - report inappropriate behaviour
    - report security threats or breaches
    - netiquette, content filtering, avoid inappropriate disclosure of information, carry out security checks, proxy servers
- Threats to information security:
    - malicious programs (including viruses, worms, Trojans, spyware, adware and rogue diallers), hackers, phishing and identity theft
- Information security:
    - username and password/PIN selection and management, password strength, online identity/profile
    - real name, pseudonym, avatar
    - what personal information to include, who can see the information, withhold personal information

- Threats to user safety:
    - abusive behaviour (“cyber bullying”), inappropriate behaviour and grooming
    - abuse of young people
    - false identities
    - financial deception, identity theft
- Minimise risk:
    - virus-checking software, anti-spam software, firewall
    - treat messages, files, software and attachments from unknown sources with caution, internet settings, block sites, parental controls
- Laws, guidelines and procedures:
    - set by employer or organisation or centre relating to Health and safety, security; equal opportunities, disability
- Laws: relating to copyright, software download and licensing, digital rights

Unit 223 Using collaborative technologies

Level: 2
Credit value: 4
UAN: F/502/4379

Unit aim
This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

On completion of this unit a candidate should be able to facilitate the use of appropriate combinations of IT tool and devices for groups to work collaboratively by:

- planning and selecting the IT tools and devices to be used for work purposes and tasks;
- preparing and setting up access to collaborative technologies;
- presenting information and facilitating others contributions; and
- moderating the use of collaborative technologies.

Any aspect that is unfamiliar may require support and advice from others.

Examples of context: Typical collaborative activities may include – setting up a group on a social networking site for a work team; inviting people to join an online conference

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:

1. Be able to stay safe and secure when working with collaborative technology
2. Be able to plan and set up IT tools and devices for collaborative working
3. Be able to prepare collaborative technologies for use
4. Be able to contribute to tasks using collaborative technologies

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

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body
This unit was developed by e-Skills UK.

Assessment
This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 223 Using collaborative technologies

Learning outcomes and assessment criteria

Outcome 1 Be able to stay safe and secure when working with collaborative technology

The learner can:

1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines

1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum

1.3 Use appropriate methods to promote trust when working collaboratively

1.4 Carry out appropriate checks on others' online identities and different types of information

1.5 Identify and respond to inappropriate content and behaviour

Outcome 2 Be able to plan and set up IT tools and devices for collaborative working

The learner can:

2.1 Describe the purposes for using collaborative technologies

2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required

2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media

2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices

2.5 Describe the compatibility issues in different combinations of collaborative tools and devices

2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks

2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task

Outcome 3 Be able to prepare collaborative technologies for use

The learner can:

3.1 Describe what access rights and issues others may have in using collaborative technologies

3.2 Assess what permissions are needed for different users and content

3.3 Set up and use access rights to enable others to access information

3.4 Set up and use permissions to filter information

3.5 Adjust settings so that others can access IT tools and devices for collaborative working

3.6 Select and use different elements to control environments for collaborative technologies

3.7 Select and join networks and data feeds to manage data to suit collaborative tasks

Outcome 4 Be able to contribute to tasks using collaborative technologies

The learner can:

4.1 Describe rules of engagement for using collaborative technologies
4.2 Enable others to contribute responsibly to collaborative tasks
4.3 Present relevant and valuable information
4.4 Moderate the use of collaborative technologies
4.5 Archive the outcome of collaborative working
4.6 Assess when there is a problem with collaborative technologies and when to get expert help
4.7 Respond to problems with collaborative technologies

Unit 223 Using collaborative technologies

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Be able to stay safe and secure when working with collaborative technology

The learner should be able to and understand:

- Guidelines for using collaborative technology:
    - Guidelines set by your organisation or community of interest
    - About uses, security, safety, copyright, plagiarism, libel, confidentiality and data protection
- Risks when working with collaborative technologies:
    - Inappropriate disclosure of personal information
    - Misuse of images, appropriate language, respect confidentiality, copy lists
    - What to do in a power cut, about data loss
    - From unwanted or inappropriate content or access, back-ups, data exporting
- Methods to promote trust:
    - Contact information, membership of professional bodies, recommendations, links, policies, standards
- Checks on others' online identities:
    - Compare sources, cross references

Outcome 2 Be able to plan and set up IT tools and devices for collaborative working

The learner should be able to and understand:

- Purposes for collaborative working:
    - Will vary according to the task, but may include:
        - sharing, displaying and recording information
        - discussing and reflecting, establishing identity, joining interest groups
        - developing ideas, contributing to research, carrying out research
        - exporting information to other formats
        - establishing communities of interest
        - managing identities, managing data
- Outcomes of collaborative working:
    - Measurable (eg document, minutes, notes, project plan, transcript)
    - Ephemeral (eg conversation, agreement)
    - Whether an audit trail is needed
- Collaborative technology tools and devices:
    - Hardware: mobile, laptop, desktop, peripherals (eg headset, handset, microphone, camera, 3G modem)
    - Software: products, services, sites

- Communication media:
    - Text, audio/spoken, still/video/animated images
- Connect and configure collaborative technologies:
    - Connect to another site, check whether both sites are connected
    - Connect to multiple sites, check when multiple sites are connected
    - Adjust clarity
- Compatibility issues:
    - Between browser software, operating systems, plug-ins

Outcome 3 Be able to prepare collaborative technologies for use

The learner should be able to and understand:

- Access to collaborative technologies:
    - Download software, agree terms and conditions, register or set up an ID
    - Accessibility issues, adjusting access settings
- Adjust settings:
    - Hardware: colour, type size, window size, volume
    - Browser: cookies, pop-ups
    - Security settings: firewall
- Environments for collaborative technologies:
    - User interface: choose skins, templates, widgets, wizards, cut and paste from other sources
    - Work environment: lighting, position of devices
- Managing data for collaborative working:
    - Sources, subscription details, terms and conditions
    - Aims of data management
    - Benefits, features and limitations of networks and feeds
- Permissions:
    - Web address, phone number, user name and password, set up user names and access codes

Outcome 4 Be able to contribute to tasks using collaborative technologies

The learner should be able to and understand:

- Contributing responsibly:
    - Follow the rules of 'netiquette', respect others contributions, avoid dominating and not responding
    - Legal and cultural issues
- Moderating collaborative working:
    - Reporting inappropriate content
    - Checking posts
    - Archiving outcomes:
    - Cut, paste, save; record, transcribe
- Problems with collaborative technologies:
    - Routine (eg settings, software not responding, hardware connections)
    - Non-routine (eg access, transmission speed, bandwidth)

- Respond to problems:
    - Follow on screen help, know who to ask for expert help
    - Use diagnostic wizards, check bandwidth

Unit 224 IT communication fundamentals

Level: 2
Credit value: 2
UAN: D/502/4292

Unit aim
This unit aims to develop knowledge, understanding and skills in IT communication fundamentals.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to select and use a variety of sources of information to meet needs
2. Be able to access, search for, select and use Internet-based information and evaluate its fitness for purpose
3. Be able to select and use IT to communicate and exchange information safely, responsibly and effectively

Guided learning hours
It is recommended that **15** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Assessment
See IT User Assessment Strategy available from **www.e-skills.com**

Unit 224 IT communication fundamentals

Learning outcomes and assessment criteria

Outcome 1 Be able to select and use a variety of sources of information to meet needs

The learner can:

1.1 Select and use appropriate sources of IT-based and other forms of information which match requirements

1.2 Describe different features of information

1.3 Recognise copyright and other constraints on the use of information

Outcome 2 Be able to access, search for, select and use Internet-based information and evaluate its fitness for purpose

The learner can:

2.1 Access, navigate and search Internet sources of information purposefully and effectively

2.2 Use appropriate search techniques to locate relevant information

2.3 Use discrimination to select information that matches requirements and is fit for purpose

2.4 Evaluate information to make sure it matches requirements and is fit for purpose

Outcome 3 Be able to select and use IT to communicate and exchange information safely, responsibly and effectively

The learner can:

3.1 Create, access, read and respond appropriately to Email and other IT-based communication, including attachments, and adapt style to suit audience

3.2 Use IT tools to manage an address book and schedule activities

3.3 Manage storage of IT-based communications

3.4 Describe how to respond to common IT-based communication problems

3.5 Respond appropriately to common IT-based communication problems

Unit 225 Time planning in sales

Level: 2
Credit value: 2
UAN: F/502/8559

Unit aim
This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Understand how to manage and prioritise time in a sales role
2. Be able to plan own time in a sales role
3. Be able to evaluate time planning in a sales role

Guided learning hours
It is recommended that **13** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to Council for Administration Sales NOS: SLS54 Manage and prioritise time for sales activities.

Support of the unit by a sector or other appropriate body
This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.

Assessment
For those assessment criteria which are performance related the most likely form of evidence is assessor observation.

Unit 225 Time planning in sales

Learning outcomes and assessment criteria

Outcome 1 Understand how to manage and prioritise time in a sales role

The learner can:

1.1 Explain the importance of time management and its impact on sales objectives
1.2 Describe how a sales team member uses and measures the use of time
1.3 Describe best practice time management techniques
1.4 Explain how to review the use of time spent on sales activities

Outcome 2 Be able to plan own time in a sales role

The learner can:

2.1 Identify own long-term sales commitments and immediate goals
2.2 Identify work-related priorities
2.3 Identify the differences between tasks that are urgent and tasks that are important
2.4 Consolidate tasks to reduce workload and time wastage
2.5 Identify opportunities to gain support from others to complete work
2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency

Outcome 3 Be able to evaluate time planning in a sales role

The learner can:

3.1 Identify unnecessary tasks that are not directly related to own objectives
3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time
3.3 Identify productive periods of time
3.4 Identify the opportunities for improving the use of time

Unit 226 Selling by telephone (inbound)

Level: 2
Credit value: 4
UAN: J/502/8577

Unit aim
This unit aims to provide the skills necessary for responding to inbound sales calls.

Learning outcomes
There are **seven** learning outcomes to this unit. The learner will:
1. Understand how to sell by telephone (inbound)
2. Understand how to close the sale during inbound telephone sales calls
3. Be able to prepare for the inbound telephone sales call
4. Be able to identify customer needs during inbound telephone sales calls
5. Be able to present products and/or services to the customer during inbound telephone sales calls
6. Be able to deal with sales objections during inbound telephone sales calls
7. Be able to close the sale during inbound telephone sales calls

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

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to Council for Administration Sales NOS: SLS73 Sell products or services over the telephone.

Support of the unit by a sector or other appropriate body
This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.

Assessment
For those assessment criteria which are performance related the most likely form of evidence is assessor observation.

Unit 226 Selling by telephone (inbound)

Learning outcomes and assessment criteria

Outcome 1 Understand how to sell by telephone (inbound)

The learner can:

1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls

1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons

1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls

1.4 Describe the different methods used to sell benefits during inbound telephone sales calls

Outcome 2 Understand how to close the sale during inbound telephone sales calls

The learner can:

2.1 Explain how to manage customer behaviour during inbound telephone sales calls

2.2 Describe methods for closing sales during inbound telephone sales calls

2.3 Explain how to evaluate and measure the success of inbound telephone sales calls

2.4 Describe interactive ICT options available to support telephone sales activities

Outcome 3 Be able to prepare for the inbound telephone sales call

The learner can:

3.1 Identify objectives for selling products and/or services by inbound telephone sales calls

3.2 Organise materials for a call in accordance with the sales call plan

Outcome 4 Be able to identify customer needs during inbound telephone sales calls

The learner can:

4.1 Greet and respond to callers in accordance with organisational procedures

4.2 Obtain information from customers about their needs

4.3 Assess the potential value of calls and customers

4.4 Identify products and/or services with features and functions that customers need or want

4.5 Identify opportunities for further sales and/or sales of other products and/or services

Outcome 5 Be able to present products and/or services to the customer during inbound telephone sales calls

The learner can:

5.1 Explain the benefits and features of products and/or services offered

5.2 Interpret the customer's reaction and decide how to progress the sale

Outcome 6 Be able to deal with sales objections during inbound telephone sales calls

The learner can:

6.1 Identify sales objections prior to dealing with the customer

6.2 Clarify objections and identify potential sales opportunities from them

6.3 Deal with customer queries and objections with clear and accurate responses

6.4 Resolve customer queries about the product and/or service

6.5 Reassure the customer to confirm their objections have been overcome

6.6 Develop a positive relationship with the customer and identify and pursue further customer contact

Outcome 7 Be able to close the sale during inbound telephone sales calls

The learner can:

7.1 Perform a trial close to establish whether or not further objections exist

7.2 Gain commitment from the customer to close the sale

7.3 Complete the formalities of the sale following organisational procedures

7.4 Provide customer feedback and reaction to products and/or services to appropriate people in own organisation

Unit 227 Selling by telephone (outbound)

Level: 2
Credit value: 4
UAN: J/502/8580

Unit aim
This unit aims to provide the skills necessary for conducting outbound sales calls.

Learning outcomes
There are **seven** learning outcomes to this unit. The learner will:
1. Understand how to sell by telephone (outbound)
2. Understand how to close the sale during outbound telephone sales calls
3. Be able to prepare for the inbound telephone sales call
4. Be able to identify customer needs during outbound telephone sales calls
5. Be able to present products and/or services to the customer during outbound telephone sales calls
6. Be able to deal with sales objections during outbound telephone sales calls
7. Be able to close the sale during outbound telephone sales calls

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

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to Council for Administration Sales NOS: SLS73 Sell products or services over the telephone.

Support of the unit by a sector or other appropriate body
This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.

Assessment
For those assessment criteria which are performance related the most likely form of evidence is assessor observation.

Unit 227 Selling by telephone (outbound)

Learning outcomes and assessment criteria

Outcome 1 Understand how to sell by telephone (outbound)

The learner can:

1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls

1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons

1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls

1.4 Describe the different methods used to sell benefits during outbound telephone sales calls

Outcome 2 Understand how to close the sale during outbound telephone sales calls

The learner can:

2.1 Explain how to manage customer behaviour during outbound telephone sales calls

2.2 Describe methods for closing sales during outbound telephone sales calls

2.3 Explain how to evaluate and measure the success of outbound telephone sales calls

2.4 Describe interactive ICT options available to support telephone sales activities

Outcome 3 Be able to prepare for the inbound telephone sales call

The learner can:

3.1. Identify objectives for selling products and/or services by outbound telephone sales calls

3.2. Use agreed call lists or leads to plan sales calls

3.3. Organise materials for the call in accordance with the sales call plan

Outcome 4 Be able to identify customer needs during outbound telephone sales calls

The learner can:

4.1 Assess the potential value of calls and customers

4.2 Prioritise calls according to likely customer value and probability of closure

4.3 Obtain information from customers about their needs

4.4 Identify products and/or services with features and functions that customers need or want

4.5 Identify opportunities for further sales and/or sales of other products and/or services

Outcome 5 Be able to present products and/or services to the customer during outbound telephone sales calls

The learner can:

5.1 Explain the benefits and features of products and or services offered

5.2 Interpret the customer's preferred solution and decide how to progress the sale

Outcome 6 Be able to deal with sales objections during outbound telephone sales calls

The learner can:

6.1 Identify likely sales objections prior to dealing with the customer

6.2 Clarify objections and identify potential sales opportunities from them

6.3 Deal with customer queries and objections with clear and accurate responses

6.4 Resolve customer queries about the product and/or service

6.5 Reassure the customer to confirm their objections have been overcome

6.6 Develop a positive relationship with customers and identify and pursue further customer contact

Outcome 7 Be able to close the sale during outbound telephone sales calls

The learner can:

7.1 Perform a trial close to establish whether or not further objections exist

7.2 Gain a commitment from the customer

7.3 Complete the formalities of the sale following organisational procedures

7.4 Provide customer feedback and reaction to products or services to appropriate people in own organization

Unit 228 Inputting and accessing sales or marketing data in information systems

Level: 2
Credit value: 2
UAN: D/502/8584

Unit aim
This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Understand how to input and access sales or marketing data in information systems
2. Understand the use of sales or marketing information sources and systems
3. Be able to input and use databases to support sales or marketing activities

Guided learning hours
It is recommended that **15** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to Council for Administration Sales NOS: SLS81 Input and access data in your organisation's information systems.

Support of the unit by a sector or other appropriate body
This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.

Assessment
For those assessment criteria which are performance related the most likely form of evidence is assessor observation.

Unit 228 Inputting and accessing sales or marketing data in information systems

Learning outcomes and assessment criteria

Outcome 1 Understand how to input and access sales or marketing data in information systems

The learner can:

1.1 Explain the uses of IT in the sales or marketing function

1.2 Identify why information is needed for sales or marketing activities

1.3 Describe how sufficient, valid and reliable sources of sales or marketing information can be gathered

1.4 Explain the reasons for using an established data storage system

1.5 Describe the role, advantages and disadvantages of manual and computerised systems

1.6 Explain ways of classifying sales or marketing information and the protocol for data storage

Outcome 2 Understand the use of sales or marketing information sources and systems

The learner can:

2.1 Explain methods of presenting sales or marketing information

2.2 Describe the features of software and hardware used to manage sales or marketing information

2.3 Describe how to plan and organise searches for sales or marketing information

2.4 Explain the implications of entering incorrect sales or marketing data

2.5 Explain why certain types of sales or marketing information are confidential

2.6 Explain the scope of own authority and responsibility when using sales or marketing information and databases

2.7 Explain the actions to be taken in the case of a breach of confidentiality

Outcome 3 Be able to input and use databases to support sales or marketing activities

The learner can:

3.1 Gather sales or marketing information

3.2 Identify potential information sources that are likely to support planned sales or marketing activities

3.3 Follow organisational procedures to report concerns about security/confidentiality

3.4 Use sales information gathered to support specified sales or marketing activities

3.5 Input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future

Unit 229 Handling objections and closing sales

Level: 2
Credit value: 3
UAN: M/502/8606

Unit aim
This unit aims to provide the skills and knowledge required to handle objections and close sales.

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Understand how to handle sales objections
2. Understand how to close the sale
3. Be able to handle objections
4. Be able to close the sale

Guided learning hours
It is recommended that **22** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body
This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.

Assessment
For those assessment criteria which are performance related the most likely form of evidence is assessor observation.

Unit 229 Handling objections and closing sales

Learning outcomes and assessment criteria

Outcome 1 Understand how to handle sales objections

The learner can:

1.1 Explain the difference between standard and non-standard sales objections
1.2 Explain how to clarify objections and identify potential sales opportunities from them
1.3 Describe how to use questioning techniques to explore and resolve customer issues
1.4 Explain how to empathise with and reassure the customer
1.5 Explain the difference between hypothetical and real objections
1.6 Explain how knowledge of products and services can be used to answer objections
1.7 Explain how competitor activity may affect the potential sale
1.8 Describe how industry/sector pricing structures may have an impact on sales objections
1.9 Explain the scope of authority and responsibility when dealing with objections
1.10 State who to go to when in need of support to overcome objections

Outcome 2 Understand how to close the sale

The learner can:

2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale
2.2 Explain how to perform a trial close
2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
2.4 Explain potential barriers to closing the sale
2.5 Explain a range of ways to close the sale

Outcome 3 Be able to handle objections

The learner can:

3.1 Clarify the nature and extent of objections
3.2 Explain to the customer the concessions available within the scope of authority
3.3 Follow organisational procedures for dealing with objections
3.4 Promote the benefits of products and/or services to overcome objections
3.5 Use testimonials to overcome objections
3.6 Refer to those in authority when dealing with objections outside the scope of own authority

Outcome 4 Be able to close the sale

The learner can:

4.1 Perform a trial close and ask for the order when objections have been met
4.2 Make use of add-on, up-selling or cross-selling opportunities
4.3 Follow organisational procedures for accepting confirmation of an order

Appendix 1 Sources of general information

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

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. 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
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

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

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

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

Useful contacts

UK learners **General qualification information**	**T: +44 (0)844 543 0033** **E: learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, GOLA/e-volve, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

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