LEVEL 1 IMPORTED UNITS

NVQ in Contact Centre Operations (3412)

Level 3 imported unit pack

May 2011 Version 1.0

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

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1 Introduction

This document contains imported units available within the following qualifications:

Title and level	City & Guilds number	Accreditation number
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

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 NVQs 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
K/601/1233	311	Build a customer service knowledge set	3	47	7				✓	
D/601/1553	312	Work with others to improve customer service	3	53	8			✓	✓	
Y/601/1230	313	Organise the delivery of reliable customer service	3	40	6				✓	
D/601/1522	314	Process customer service complaints	3	40	6			✓	✓	
H/601/1568	315	Lead a team to improve customer service	3	47	7				✓	
H/601/1571	316	Gather, analyse and interpret customer feedback	3	67	10				✓	✓
T/601/1574	317	Monitor the quality of customer service transactions	3	47	7				✓	
J/502/4397	318	Bespoke software	3	30	4				✓	
L/600/9586	319	Manage own professional development within an organisation	3	20	4				✓	

UAN	City & Guilds unit	Unit title	Level	GLH	Credit value	L1 Award	L1 Cert	L2 Cert	L3 Dip	L4 Dip
M/600/9600	320	Set objectives and provide support for team members	3	35	5				✓	
M/600/9628	321	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility	3	20	4				✓	
L/600/9636	322	Support team members to identify, develop and implement new ideas	3	20	4				✓	
H/600/9660	323	Develop working relationships with colleagues	3	15	3			✓	✓	
Y/600/9669	324	Plan and allocate and monitor work of a team	3	25	5				✓	
R/600/9685	325	Manage conflict in a team	3	20	3				✓	
Y/600/9686	326	Lead and manage meetings	3	20	4				✓	
D/600/9804	327	Manage customer service in own area of responsibility	3	25	4				✓	
F/502/8612	328	Negotiating, handling objections and closing sales	3	22	4				✓	
A/502/8639	329	Contributing to the development and launch of new products and/or services	3	26	4				✓	✓
T/502/8641	330	Leading a sales or marketing team	3	25	4				✓	

The units follow in City & Guilds unit number order.

Unit 311 Build a customer service knowledge set

Level: 3
Credit value: 7
UAN: K/601/1233

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

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

1. Be able to input details of customer queries and requests and develop responses
2. Be able to use a customer service knowledge base
3. Understand how to build a customer service knowledge set

Guided learning hours
It is recommended that **47** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit A16 of the Customer Service NOS 2010.

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

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

Unit 311 Build a customer service knowledge set

Learning outcomes and assessment criteria

Outcome 1: Be able to input details of customer queries and requests and develop responses

The learner can:

1.1 identify through active listening customer queries and comments for inclusion in the knowledge set

1.2 classify information collected through customer contact for inclusion in the knowledge set

1.3 identify questions frequently asked by customers

1.4 identify the broad customer service messages of their organisation's answers to frequently asked questions

1.5 work with colleagues to develop responses to customer queries and requests

1.6 contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages

1.7 check the effects of possible responses included in the knowledge set with customers

1.8 monitor the customer service knowledge set to identify trends and patterns

Outcome 2: Be able to use a customer service knowledge base

The learner can:

2.1 access information from the customer service knowledge set using specific search criteria

2.2 browse the customer service knowledge set to research a topic of interest or project area

2.3 use the customer service knowledge set to inform the introduction of a new product or service variation

2.4 use the customer service knowledge set to respond to a specific customer request or query

2.5 assist a colleague to locate specific information in the customer service knowledge set

2.6 add to the customer service knowledge set as a result of dealing with a customer request or query

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

The learner can:

3.1 explain the structure and content of their organisation's customer service information set

3.2 describe how to input and update routines for adding to the customer service knowledge set

3.3 identify ways that information in a customer service knowledge set can be classified

3.4 identify questions frequently asked by customers of their organisation

3.5 explain the importance of working with colleagues to develop responses to customer requests and queries

3.6 describe their organisation's key messages in relation to the services or products they are delivering

3.7 identify ways to interpret information in a customer service knowledge set

3.8 describe techniques for assisting a colleague to locate information in a customer service knowledge set

Unit 311 Build a customer service knowledge set

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

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

Unit 312 Work with others to improve customer service

Level: 3
Credit value: 8
UAN: D/601/1553

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

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to improve customer service by working with others
2. Be able to monitor their own performance when improving customer service
3. Be able to monitor team performance when improving customer service
4. Understand how to work with others to improve customer service

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

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit D8 of the Customer Service NOS 2010.

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

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

Unit 312 Work with others to improve customer service

Learning outcomes and assessment criteria

Outcome 1: Be able to improve customer service by working with others

The learner can:

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

Outcome 2: Be able to monitor their own performance when improving customer service

The learner can:

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

Outcome 3: Be able to monitor team performance when improving customer service

The learner can:

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

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

The learner can:

4.1 describe who else is involved either directly or indirectly in the delivery of customer service
4.2 describe the roles and responsibilities of others in their organisation
4.3 describe the roles of others outside their organisation who have an impact on their services or products
4.4 evaluate what the goals or targets of their organisation are in relation to customer service and how these are set
4.5 evaluate how their organisation identifies improvements in customer service

Unit 312 Work with others to improve customer service

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4 Your evidence must include examples of agreeing customer service roles and responsibilities which are:

- a part of your own role
- b part of other people's roles.

5 You must provide evidence that you have worked with two of these groups of people:

- a team members or colleagues
- b suppliers or service partners
- c supervisors, team leaders or managers.

6 Your evidence must show that your work with others involves communication by two of these methods as expected within your job role:

- a face to face
- b in writing
- c by telephone
- d using text messages
- e by e-mail
- f using the internet (including social networking)
- g using an intranet.

Unit 313 Organise the delivery of reliable customer service

Level: 3
Credit value: 6
UAN: Y/601/1230

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

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to plan and organise the delivery of reliable customer service
2. Be able to review and maintain customer service delivery
3. Be able to use recording systems to maintain reliable customer service
4. Understand how to organise the delivery of reliable customer service

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

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit B10 of the Customer Service NOS 2010.

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

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

Unit 313 Organise the delivery of reliable customer service

Learning outcomes and assessment criteria

Outcome 1: Be able to plan and organise the delivery of reliable customer service

The learner can:

1.1 plan, prepare and organise everything they need to deliver services or products to different types of customers

1.2 organise what they do to ensure that they are consistently able to give prompt attention to your customers

1.3 reorganise their work to respond to unexpected additional workloads

Outcome 2: Be able to review and maintain customer service delivery

The learner can:

2.1 maintain service delivery during very busy periods and unusually quiet periods

2.2 maintain service delivery when systems, people or resources have let them down

2.3 consistently meet their customers' expectations

2.4 balance the time they take with their customers with the demands of other customers seeking their attention

2.5 respond appropriately to their customers when customers make comments about the products or services they are offering

2.6 alert others to repeated comments made by their customers

2.7 take action to improve the reliability of their service based on customer comments

2.8 monitor the action they have taken to identify improvements in the service they give to their customers

Outcome 3: Be able to use recording systems to maintain reliable customer service

The learner can:

3.1 record and store customer service information accurately following organisational guidelines

3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format

3.3 quickly locate information that will help solve a customer's query

3.4 supply accurate customer service information to others using the most appropriate method of communication

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

The learner can:

4.1 describe organisational procedures for unexpected situations and their role within them

4.2 describe resource implications in times of staff sickness and holiday periods and their responsibility at these times

4.3 explain the importance of having reliable and fast information for their customers and their organisation

4.4 evaluate the organisational procedures and systems for delivering customer service

4.5 identify useful customer feedback and explain how to decide which feedback should be acted on

4.6 describe how to communicate feedback from customers to others

4.7 evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information

4.8 explain the legal and regulatory requirements regarding the storage of data

Unit 313 Organise the delivery of reliable customer service

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4 You need to include evidence that you have dealt with a variety of customers including:

- a customers who are easy to deal with
- b customers who are difficult to deal with
- c existing customers
- d new customers.

5 Your evidence must show that you have:

- a taken responsibility for your own actions in the delivery of customer service
- b used spontaneous customer feedback to improve customer service
- c used customer feedback that you have requested to improve customer service

6 The system you use for recording data can be manual or electronic.

Unit 314 Process customer service complaints

Level: 3
Credit value: 6
UAN: D/601/1522

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

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to recognise the signs that a query or problem is about to produce a complaint
2. Be able to deal with a complaint effectively
3. Understand how to process customer service complaints

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

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit C7 of the Customer Service NOS 2010.

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

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

Unit 314 Process customer service complaints

Learning outcomes and assessment criteria

Outcome 1: Be able to recognise the signs that a query or problem is about to produce a complaint

The learner can:

1.1 identify signs that a customer is becoming dissatisfied with the customer service of their organisation

1.2 take action to change the situation so that the query or problem does not result in a complaint

1.3 take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made

Outcome 2: Be able to deal with a complaint effectively

The learner can:

2.1 ensure that they have a clear understanding of the nature and details of the complaint

2.2 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint

2.3 identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation

2.4 assess the risks to their organisation of choosing each option

2.5 report the findings of their investigation to their customer and offer their chosen solution

2.6 escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so

2.7 give feedback to other colleagues involved which will help them avoid future complaints

2.8 keep clear records of the way the complaint has been handled to avoid later misunderstandings

Outcome 3: Understand how to process customer service complaints

The learner can:

3.1 explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery

3.2 explain why dealing with complaints is an inevitable part of delivering customer service

3.3 describe organisational procedures for dealing with complaints

3.4 explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation

3.5 explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported

3.6 explain when to escalate a complaint by involving more senior members of the organisation or an independent third party

3.7 explain the cost and regulatory implications of admitting liability for an error made by their organisation

3.8 identify how to spot and interpret signals that their customer may be considering making a complaint

3.9 describe techniques for handling conflict

3.10 explain the importance of dealing with a complaint promptly

3.11 explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint

3.12 explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied

Unit 314 Process customer service complaints

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4 You must provide evidence that you have processed complaints that are seen by your organisation as:
- a justified
- b unjustified.

5 You must provide evidence of processing customer service complaints:
- a during routine delivery of customer service
- b during a busy time in your job
- c during a quiet time in your job
- d when people, systems or resources have let you down.

6 You need to provide evidence that you have dealt with customers who:
- a have different needs and expectations
- b appear angry or confused
- c behave unusually.

7 You must provide evidence that you have processed complaints and taken full account of:
- a organisational procedures
- b sector or industry codes of practice
- c legislation.

Unit 315 Lead a team to improve customer service

Level: 3
Credit value: 7
UAN: H/601/1568

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

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to plan and organise the work of a team
2. Be able to provide support for team members
3. Be able to review performance of team members
4. Understand how to lead a team to improve customer service

Guided learning hours
It is recommended that **47** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit D11 of the Customer Service NOS 2010.

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

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

Unit 315 Lead a team to improve customer service

Learning outcomes and assessment criteria

Outcome 1: Be able to plan and organise the work of a team

The learner can:

1.1 treat team members with respect at all times

1.2 agree with team members their role in delivering effective customer service

1.3 involve team members in planning and organising their customer service work

1.4 allocate work which takes full account of team members' customer service skills and the objectives of the organisation

1.5 motivate team members to work together to raise their customer service performance

Outcome 2: Be able to provide support for team members

The learner can:

2.1 check that team members understand what they have to do to improve their work with customers and why that is important

2.2 check with team members what support they feel they may need throughout this process

2.3 provide team members with support and direction when they need help

2.4 encourage team members to work together to improve customer service

Outcome 3: Be able to review performance of team members

The learner can:

3.1 provide sensitive feedback to team members about their customer service performance

3.2 encourage team members to discuss their customer service performance

3.3 discuss sensitively with team members action they need to take to continue to improve their customer service performance

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

The learner can:

4.1 describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation

4.2 explain how team and individual performance can affect the achievement of organisational objectives

4.3 explain the implications of failure to improve customer service for their team members and their organisation

4.4 describe how to plan work activities

4.5 explain how to present plans to others to gain understanding and commitment

4.6 explain how to facilitate meetings to encourage frank and open discussion

4.7 explain how to involve and motivate staff to encourage teamwork

4.8 describe how to recognise and deal sensitively with issues of underperformance

Unit 315 Lead a team to improve customer service

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4 You must provide evidence you have line management or supervisory responsibility for the team members used in your evidence.

5 You must show that you have taken into account the organisational constraints of:

- a time
- b human resources
- c physical resources
- d financial resources.

6 You must also show that you have taken into account the team or individual constraints of:

- a existing workloads
- b individual capabilities and sensitivities
- c initiatives and objectives currently being undertaken by the organisation
- d influences operating on the team from outside.

7 Your evidence must provide evidence that you have taken time with each team member to:

- a plan and organise their work
- b provide support and guidance
- c give and seek feedback on performance.

8 The feedback you provide to team members may be

- a formal or informal
- b verbal or in writing.

Unit 316 Gather, analyse and interpret customer feedback

Level: 3
Credit value: 10
UAN: H/601/1571

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

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to plan to gather customer feedback
2. Be able to gather customer feedback
3. Be able to analyse and interpret customer feedback
4. Understand how to gather, analyse and interpret customer feedback

Guided learning hours
It is recommended that **67** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit D12 of the Customer Service NOS 2010.

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

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

Unit 316 Gather, analyse and interpret customer feedback

Learning outcomes and assessment criteria

Outcome 1: Be able to plan to gather customer feedback

The learner can:

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

Outcome 2: Be able to gather customer feedback

The learner can:

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

Outcome 3: Be able to analyse and interpret customer feedback

The learner can:

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

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

The learner can:

4.1 explain random sampling techniques and how to evaluate bias in non-random samples

4.2 identify principles of questionnaire design

4.3 identify principles of effective interviewing

4.4 explain how to calculate the cost of a customer survey

4.5 describe techniques for monitoring data collection

4.6 explain how to use appropriate software to record and analyse customer feedback

4.7 describe methods of displaying and presenting data in a way that is easy to understand

4.8 explain statistical techniques for summarising trends and patterns

4.9 describe organisational procedures for recommending changes in the service offer or customer service procedures

4.10 compare the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail

Unit 316 Gather, analyse and interpret customer feedback

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4 Your evidence must show that you have collected feedback from customers:

- a using informal methods such as conversation and observation of customer reactions
- b using two different formal methods such as questionnaire, telephone or interview surveys.

5 Your evidence must include feedback that you have collected:

- a using a method you have devised
- b following established organisational procedures.

6 You must provide evidence that you have displayed the results of your data collection:

- a in tabulated form
- b in graphical or pictorial form.

Unit 317 Monitor the quality of customer service transactions

Level: 3
Credit value: 7
UAN: T/601/1574

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

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to prepare to monitor the quality of customer service transactions
2. Be able to monitor the quality of customer service transactions
3. Be able to give feedback on the quality of customer service transactions
4. Understand how to monitor the quality of customer service transactions

Guided learning hours
It is recommended that **47** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit directly relates to Unit D13 of the Customer Service NOS 2010.

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

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

Unit 317 Monitor the quality of customer service transactions

Learning outcomes and assessment criteria

Outcome 1: Be able to prepare to monitor the quality of customer service transactions

The learner can:

1.1 identify the criteria against which quality of customer service transactions will be monitored

1.2 agree a sampling frame for monitoring customer service transactions

1.3 follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed

1.4 identify ratings and scales against which quality of customer service transactions can be measured

1.5 ensure that they are totally familiar with the customer service procedures for transactions they are monitoring

Outcome 2: Be able to monitor the quality of customer service transactions

The learner can:

2.1 carry out spot checks on or observations of the quality of customer service transactions

2.2 carry out planned and routine checks on or observations of the quality of customer service transactions

2.3 observe or listen to a colleague dealing with a customer service transaction

2.4 record their observations of a colleague's performance against agreed quality criteria

2.5 make judgements about their colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale

2.6 analyse and summarise their observations to identify patterns and trends in their colleague's performance

Outcome 3: Be able to give feedback on the quality of customer service transactions

The learner can:

3.1 engage with their colleague in preparation for giving feedback on the quality of their customer service delivery

3.2 provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well

3.3 give feedback to their colleague regarding features of their customer service delivery that would benefit from development

3.4 propose actions for coaching or training of a colleague in areas that would improve their customer service delivery

3.5 maintain records of customer service quality monitoring and action plans for improvements

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

The learner can:

4.1 review the criteria against which the quality of customer service delivery is judged in the their organisation

4.2 describe ways to construct a representative sample of customer service transactions in order to monitor quality

4.3 explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service

4.4 explain how to define ratings and scales against which customer service transactions can be judged

4.5 explain their organisation's procedures and guidelines for customer service delivery

4.6 describe ways to record details of customer service transactions they have observed in order to provide feedback

4.7 describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery

4.8 explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement

4.9 describe sources of information about coaching and training options to improve customer service delivery

4.10 explain the importance of keeping detailed records of coaching and training relating to customer service delivery

Unit 317 Monitor the quality of customer service transactions

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

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

Unit 318 Bespoke software

Level: 3
Credit value: 4
UAN: J/502/4397

Unit aim
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 range of advanced bespoke software tools and techniques for complex or non-routine information.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to input and combine information using bespoke software
2. Be able to create and modify appropriate structures to organise and retrieve information efficiently
3. Be able to exploit the functions of the software effectively to process and present information

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 3 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 318 Bespoke software

Learning outcomes and assessment criteria

Outcome 1: Be able to input and combine information using bespoke software

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 within the application and across different software applications

Outcome 2: Be able to create and modify appropriate structures to organise and retrieve information efficiently

The learner can:

2.1 evaluate the use of software functions to structure, layout and style information

2.2 create, change and use appropriate structures and/or layouts to organise information efficiently

2.3 manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3: Be able to exploit 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, analyse and format information

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

3.3 identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs

3.4 select and use presentation methods to aid clarity and meaning

Unit 318 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 software

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)
        - shortcuts, customise keys
- File types and software:
    - text (e.g. rtf, doc, PDF)
    - images (e.g. jpeg, tiff, psd)
    - charts and graphs (e.g. xls)
    - sound (e.g. wav, MP3)
- Combining information techniques:
    - insert, size, position, wrap, order, group
    - links and references to external data
    - version control
    - import data, export data

Outcome 2: Be able to create and modify appropriate structures to organise and retrieve information efficiently

The learner should be able to and understand:

- Structures, layouts and conventions:
    - apply and change existing templates, set up templates for common information
    - apply or change existing styles, set up styles for information
- Manage data files:
    - file storage, data import and export, restore lost data
    - identify ineffective backup storage

- 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 exploit 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
- Quality problems with outcomes:
    - will vary according to the content, for example:
        - text (e.g. formatting, structure)
        - images (e.g. size, position, orientation)
        - numbers (e.g. decimal points, accuracy of calculations)
        - sound (e.g. volume, sound clip out of sync)
- 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 319 Manage own professional development within an organisation

Level: 3
Credit value: 4
UAN: L/600/9586

Unit aim
This unit is about managing your professional development in order to achieve your work objectives and your career and personal goals.

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to assess own career goals and personal development
2. Be able to set personal work objectives
3. Be able to produce a personal development plan
4. Be able to implement and monitor own personal development plan

Guided learning hours
It is recommended that **20** 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 Management NOS: M&LA2 Manage your own resources and professional development.

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 319 Manage own professional development within an organisation

Learning outcomes and assessment criteria

Outcome 1: Be able to assess own career goals and personal development

The learner can:

1.1 Identify own career and personal goals

1.2 Assess how own career goals affect work role and professional development

Outcome 2: Be able to set personal work objectives

The learner can:

2.1 Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives

Outcome 3: Be able to produce a personal development plan

The learner can:

3.1 Identify gaps between objectives set, own current knowledge and skills

3.2 Produce a development plan

Outcome 4: Be able to implement and monitor own personal development plan

The learner can:

4.1 Plan activities identified in own development plan

4.2 Explain how to monitor and review own personal development plan

Unit 320 Set objectives and provide support for team members

Level: 3
Credit value: 5
UAN: M/600/9600

Unit aim:
This unit helps learners to set and support individuals and teams to achieve objectives.

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to communicate a team's purpose and objectives to the team members
2. Be able to develop a plan with team members showing how team objectives will be met
3. Be able to support team members identifying opportunities and providing support
4. Be able to monitor and evaluate progress and recognise individual and team achievement

Guided learning hours
It is recommended that **35** 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
MSC B5 Provide leadership for your team

Endorsement of the unit by a sector or other appropriate body
Management Standards Centre

Unit 320 Set objectives and provide support for team members

Learning outcomes and assessment criteria

Outcome 1: Be able to communicate a team's purpose and objectives to the team members

The learner can:

1.1 describe the purpose of a team

1.2 set team objectives with its members which are SMART (specific, measurable, achievable, realistic and time-bound)

1.3 communicate the team's purpose and objectives to its members

Outcome 2: Be able to develop a plan with team members showing how team objectives will be met

The learner can:

2.1 discuss with team members how team objectives will be met

2.2 ensure team members participate in the planning process and think creatively

2.3 develop plans to meet team objectives

2.4 set SMART personal work objectives with team members

Outcome 3: Be able to support team members identifying opportunities and providing support

The learner can:

3.1 identify opportunities and difficulties faced by team members

3.2 discuss identified opportunities and difficulties with team members

3.3 provide advice and support to team members to overcome identified difficulties and challenges

3.4 provide advice and support to team members to make the most of identified opportunities

Outcome 4: Be able to monitor and evaluate progress and recognise individual and team achievement

The learner can:

4.1 monitor and evaluate individual and team activities and progress

4.2 provide recognition when individual and team objectives have been achieved

Unit 321 Manage or support equality of opportunity, diversity and inclusion in own area of responsibility

Level: 3
Credit value: 4
UAN: M/600/96/28

Unit aim
This unit aims to provide the skills and knowledge required to manage or support equality of opportunity, diversity and inclusion within the learners own area of responsibility.

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

1. Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies
2. Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility
3. Be able to monitor equality, diversity and inclusion within own area of responsibility

Guided learning hours
It is recommended that **20** 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 321 Manage or support equality of opportunity, diversity and inclusion in own area of responsibility

Learning outcomes and assessment criteria

Outcome 1: Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies

The learner can:

1.1 Explain how equality of opportunity, diversity and inclusion relate to legal, industry requirements and organisational policies.

1.2 Describe how equality of opportunity, diversity and inclusion are considered in planning in own area of responsibility.

Outcome 2: Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility

The learner can:

2.1 Outline an organisation's equality, diversity and inclusion policy and procedures.

Outcome 3: Be able to monitor equality, diversity and inclusion within own area of responsibility

The learner can:

3.1 Monitor how equality, diversity and inclusion activities in own area of responsibility are in line with own organisation.

Unit 322 Support team members in identifying, developing and implementing new ideas

Level: 3
Credit value: 4
UAN: L/600/9636

Unit aim
This unit aims to provide the skills and knowledge required to support team members in identifying, developing and implementing new ideas

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:
1. Be able to develop team ideas and develop the creativity of team members
2. Be able to assess the viability of team members' ideas.
3. Be able to support team members to implement ideas
4. Be able to implement team ideas

Guided learning hours
It is recommended that **20** 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 322 Support team members in identifying, developing and implementing new ideas

Learning outcomes and assessment criteria

Outcome 1: Be able to develop team ideas and develop the creativity of team members

The learner can:

1.1 Encourage team members to identify ideas.

1.2 Record team members' ideas.

Outcome 2: Be able to assess the viability of team members' ideas.

The learner can:

2.1 Assess with team members the potential benefits and risks associated with an idea, and the resources required.

Outcome 3: Be able to support team members to implement ideas

The learner can:

3.1 Explain how to support team members in submitting formal proposals for approval.

3.2 Explain to team members how to identify and overcome barriers to implementing an idea.

Outcome 4: Be able to implement team ideas

The learner can:

4.1 Monitor the implementation of ideas by own team.

4.2 Communicate the progress of implementation to relevant others own organisation.

Unit 323 Develop working relationships with colleagues

Level: 3
Credit value: 3
UAN: H/600/9660

Unit aim
This unit is about developing working relationships with colleagues

Learning outcomes
There are **five** learning outcomes to this unit. The learner will:
1. Understand the benefits of working with colleagues
2. Be able to establish working relationships with colleagues
3. Be able to act in a professional and respectful manner when working with colleagues
4. Be able to communicate with colleagues
5. Be able to identify potential work

Guided learning hours
It is recommended that **15** 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 323 Develop working relationships with colleagues

Learning outcomes and assessment criteria

Outcome 1: Understand the benefits of working with colleagues

The learner can:

1.1 Describe the benefits of productive working relationships.

Outcome 2: Be able to establish working relationships with colleagues

The learner can:

2.1 Identify colleagues within own and other organisations.

2.2 Agree the roles and responsibilities for colleagues.

Outcome 3: Be able to act in a professional and respectful manner when working with colleagues

The learner can:

3.1 Explain how to display behaviour that shows professionalism.

Outcome 4: Be able to communicate with colleagues

The learner can:

4.1 Identify, information to others clearly and concisely.

4.2 Explain how to receive and clarify own understanding of information.

Outcome 5: Be able to identify potential work

The learner can:

5.1 Identify potential work-related difficulties and conflicts of interest.

5.2 Explain how to resolve identified potential difficulties.

Unit 324 Plan, allocate and monitor work of a team

Level: 3
Credit value: 5
UAN: Y/600/9669

Unit aim:
This unit helps learners to plan and allocate the work for a team, and support, monitor and improve team performance.

Learning outcomes
There are **five** learning outcomes to this unit. The learner will:
1. Be able to plan work for a team
2. Be able to allocate work across a team
3. Be able to manage team members to achieve team objectives
4. Be able to monitor and evaluate the performance of team members
5. Be able to improve the performance of a team

Guided learning hours
It is recommended that **25** 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
MSC D5 Allocate and check work in your team

Endorsement of the unit by a sector or other appropriate body
Management Standards Centre

Unit 324 Plan, allocate and monitor work of a team

Learning outcomes and assessment criteria

Outcome 1: Be able to plan work for a team

The learner can:

1. agree team objectives with own manager
2. develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team

Outcome 2: Be able to allocate work across a team

The learner can:

1. discuss team plans with a team
2. agree work allocation and SMART (specific, measurable, achievable, realistic and time-bound) objectives with team members
3. agree standard of work required by team

Outcome 3: Be able to manage team members to achieve team objectives

The learner can:

3.1 support all team members in order to achieve team objectives

Outcome 4: Be able to monitor and evaluate the performance of team members

The learner can:

1. assess team members' work against agreed standards and objectives
2. identify and monitor conflict within a team
3. identify causes for team members not meeting team objectives

Outcome 5: Be able to improve the performance of a team

The learner can:

1. identify ways of improving team performance
2. provide constructive feedback to team members to improve their performance
3. implement identified ways of improving team performance

Unit 325 Manage conflict in a team

Level: 3
Credit value: 3
UAN: R/600/9685

Unit aim:
This unit will ensure that learners understand how to identify potential and actual conflicts within a team and take action to resolve them.

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

1. Be able to support team members' understanding of their role and position within a team
2. Be able to take measures to minimise conflict within a team
3. Understand how to encourage team members to resolve their own conflict
4. Understand legal and organisational requirements concerning conflict

Guided learning hours
It is recommended that **20** 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
MSC D10 Reduce and manage conflict in your team

Endorsement of the unit by a sector or other appropriate body
Management Standards Centre

Unit 325 Manage conflict in a team

Learning outcomes and assessment criteria

Outcome 1: Be able to support team members' understanding of their role and position within a team

The learner can:

1.1 communicate to team members the standards of work and behaviour expected of them

1.2 explain how team members can work together and support each other

Outcome 2: Be able to take measures to minimise conflict within a team

The learner can:

2.1 identify issues with organisational structures, systems or procedures that are likely to give rise to conflict

2.2 identify potential conflict between team members

2.3 explain action required to avoid potential conflict and agree strategies for conflict resolution

Outcome 3: Understand how to encourage team members to resolve their own conflict

The learner can:

3.1 explain how team members can be encouraged to identify and resolve their own problems and conflicts

3.2 explain how respect can be developed and maintained between team members

Outcome 4: Understand legal and organisational requirements concerning conflict

The learner can:

4.1 explain legal and organisational requirements concerning conflict in own team

4.2 explain how to maintain complete, accurate and confidential records of conflicts and their outcomes

Unit 326 Lead and manage meetings

Level: 3
Credit value: 4
UAN: Y/600/9686

Unit aim
This unit is about leading meetings in order to achieve their objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to prepare to lead a meeting
2. Be able to manage meeting procedures
3. Be able to chair a meeting
4. Be able to undertake post-meeting tasks

Guided learning hours
It is recommended that **20** 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 Management NOS: M&LD11 Lead meetings.

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 326 Lead and manage meetings

Learning outcomes and assessment criteria

Outcome 1: Be able to prepare to lead a meeting

The learner can:

1.1 Perform activities needed to be carried out in preparation for leading a meeting

1.2 Produce documentation in support of activities

Outcome 2: Be able to manage meeting procedures

The learner can:

2.1 Identify any formal procedures that apply in own organisation

Outcome 3: Be able to chair a meeting

The learner can:

3.1 Manage the agenda in co-operation with participants to ensure meeting objectives are met

3.2 Produce minutes of the meeting and allocate action points after discussions

Outcome 4: Be able to undertake post-meeting tasks

The learner can:

4.1 Explain that the minutes of the meeting provide an accurate record of proceedings

4.2 Communicate and follow up meeting outcomes to relevant individuals

4.3 Evaluate whether the meeting's objectives were met and identify potential improvements

Unit 327 Manage customer service in own area of responsibility

Level: 3
Credit value: 4
UAN: D/600/9804

Unit aim
This unit aims to provide the skills and knowledge required to manage customer service in the learners own area of responsibility.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to establish and communicate measurable customer service standards for own area of responsibility
2. Be able to support staff in meeting customer service standards
3. Be able to monitor and evaluate customer service performance

Guided learning hours
It is recommended that **25** 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 327 Manage customer service in own area of responsibility

Learning outcomes and assessment criteria

Outcome 1: Be able to establish and communicate measurable customer service standards for own area of responsibility

The learner can:

1.1 State organisational, legal and regulatory requirements for customer service standards.

1.2 Explain expected standards for customer service performance to employees in own area of responsibility.

1.3 Describe measurement criteria to monitor customer service performance.

Outcome 2: Be able to support staff in meeting customer service standards

The learner can:

2.1 Identify staff and other resources to meet customer service standards.

2.2 Communicate roles and responsibilities to employees and provide support.

2.3 Describe how to resolve customer service queries within own organisation's policy.

Outcome 3: Be able to monitor and evaluate customer service performance

The learner can:

3.1 Monitor customer service performance against established criteria.

3.2 Analyse feedback from staff and customers on the quality of customer service.

3.3 Evaluate customer feedback and identify areas for improvement.

3.4 Recommend changes to customer service processes or standards based on performance evaluation.

Unit 328 Negotiating, handling objections and closing sales

Level: 3
Credit value: 4
UAN: F/502/8612

Unit aim
This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.

Learning outcomes
There are **five** learning outcomes to this unit. The learner will:
1. Understand how to handle objections and negotiate with the customer
2. Be able to prepare for objections and negotiation with the customer
3. Be able to handle objections
4. Be able to negotiate with the customer
5. Be able to close the sale following negotiation

Guided learning hours
It is recommended that **22** 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: SLS76 Handle objections and close sales.

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 328 Negotiating, handling objections and closing sales

Learning outcomes and assessment criteria

Outcome 1: Understand how to handle objections and negotiate with the customer

The learner can:

1.1 Describe the scope of authority and responsibility when dealing with objections
1.2 Identify the resources available to counter the sales objections
1.3 Describe how to plan and prepare for negotiation
1.4 Describe how to use testimonials to progress a sale
1.5 Explain the advantages and disadvantages of different methods of closing a sale
1.6 Explain organisational procedures for documenting the negotiated sale

Outcome 2: Be able to prepare for objections and negotiation with the customer

The learner can:

2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer
2.2 Confirm authorisation to negotiate
2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome

Outcome 3: Be able to handle objections

The learner can:

3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques
3.2 Identify and prioritise customers' concerns
3.3 Provide evidence to the customer of the strengths of the organisation's products or services
3.4 Confirm with the customer that the objection(s) have been overcome
3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals

Outcome 4: Be able to negotiate with the customer

The learner can:

4.1 Carry out negotiations according to negotiation plan
4.2 Promote the benefits of what is being offered to the customer
4.3 Explain to the customer when and why no further adjustment is possible
4.4 Obtain support to progress negotiation that is outside own level of authority

Outcome 5: Be able to close the sale following negotiation

The learner can:

5.1 Apply a trial close in accordance with the negotiation plan

5.2 Respond to any further objections and concerns

5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities

5.4 Summarise agreements made in accordance with organisational procedures and close the sale

Unit 329 Contributing to the development and launch of new products and/or services

Level: 3
Credit value: 4
UAN: A/502/8639

Unit aim
This unit aims to provide the knowledge and skills needed to contribute to the development of new products and/or services.

Learning outcomes
There are **two** learning outcomes to this unit. The learner will:
1. Understand the product development process
2. Be able to contribute to the product and/or service development and launch process

Guided learning hours
It is recommended that **26** 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: SLS 29 Contribute to the development of new products and services.

Support of the unit by a sector or other appropriate body
T 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 329 Contributing to the development and launch of new products and/or services

Learning outcomes and assessment criteria

Outcome 1: Understand the product development process

The learner can:

1.1 Describe the sales forecasting technique used by the organisation

1.2 Explain the market features and trends relating to products or services in the market

1.3 Explain the customer base for the proposed product in terms of their wants and needs

Outcome 2: Be able to contribute to the product and/or service development and launch process

The learner can:

2.1 Consult with colleagues and selected customers about a new product or service strategy

2.2 Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria

2.3 Screen new ideas in accordance with the organisation's guidelines, marketing objectives

2.4 Test the market for the proposed product and/or service in accordance with the development plan

2.5 Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification

2.6 Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan

2.7 Forecast sales to support business case preparation in accordance with the development plan

2.8 Prepare information for customers about the new product and/or service in accordance with the development plan

2.9 Use feedback from stakeholders to refine the new product and/or service

Unit 330 Leading a sales or marketing team

Level: 3
Credit value: 4
UAN: T/502/8641

Unit aim
This unit aims to provide the skills needed to lead a sales or marketing team.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:
1. Be able to set targets for the sales or marketing team
2. Be able to support the motivation of the sales or marketing team
3. Be able to monitor and evaluate the progress of the sales or marketing team

Guided learning hours
It is recommended that **25** 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: SLS41 Lead a sales team.

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 330 Leading a sales or marketing team

Learning outcomes and assessment criteria

Outcome 1: Be able to set targets for the sales or marketing team

The learner can:

1.1 Agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance

1.2 Agree personal objectives for individual members of the sales or marketing team

Outcome 2: Be able to support the motivation of the sales or marketing team

The learner can:

2.1 Provide support to team members toward achieving targets and objectives

2.2 Give recognition to individuals' successes

2.3 Use individual rewards and incentives to maintain morale in a sales or marketing environment

2.4 Encourage team members to put forward ideas

2.5 Assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavors

Outcome 3: Be able to monitor and evaluate the progress of the sales or marketing team

The learner can:

3.1 Monitor activities and progress across the team in accordance with the sales or marketing plan

3.2 Monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan

3.3 Monitor customer interaction with individual team members in accordance with the sales or marketing plan

3.4 Evaluate customer interaction with individual team members against agreed criteria

3.5 Monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities

3.6 Appraise the success of sales or marketing activities against agreed objectives and targets

3.7 Identify areas for improvement in sales or marketing activities

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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