SVQ in Customer Service at SCQF Level 5 (4427-20)

Qualification handbook for centres

City& Guilds

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Contents

1   Introduction

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

Qualification title and level	**SVQ in Customer Service at SCQF Level 5**
City & Guilds qualification number	4427-20
Qualification accreditation number	GL7R 45
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The SVQ in Customer Service at SCQF Level 5 qualification aims to build on or recognise good practice in customer service in any industry or to support their technical expertise in any job role, acknowledging the importance of effective communication and service delivery. Anyone dealing with internal or external customers will benefit from gaining knowledge, understanding and experience of dealing with routine and more difficult customers, confident in their use of language and of the processes designed to make their role effective. Candidates will have the opportunity to improve their own skills and to support others within their team or organisation in the development of excellent customer service.

Contacting Skills CFA
Tel: 020 7091 9620
Website: **www.skillscfa.org**

The Institute of Customer Service (ICS)
Tel: 020 7260 2620
Website: **www.instituteofcustomerservice.com**

Version and date	Change detail	Section
1.1 Oct 2016	Updated credit values Unit 561 and 710	**Unit**

1.1   Qualification structure

To achieve the **SVQ in Customer Service at SCQF Level 5**, learners must achieve:

Minimum of 7 units of which:
Two units must be completed from **Group A: Mandatory Core Units**
One unit must be selected from **Group B: Optional Units**
One unit must be selected from **Group C: Optional Unit**
One unit must be selected from **Group D: Optional Units**
One unit must be selected from **Group E: Optional Units**
One further unit can be selected from any of **Groups B**, **C**, **D** and **E**

The table below illustrates the unit titles and the credit value of each unit the qualification will be awarded to candidates successfully completing the required combination of units.

City & Guilds unit number	Group A Mandatory Units – Customer Service Foundations	SCQF Level	SCQF Credit
4427-450	Communicate in a customer service environment (F1)	4	4
4427-551	Deliver customer service within the rules (F2)	5	4

City & Guilds unit number	Group B Optional Units – Impression and Image	SCQF Level	SCQF Credit
4427-552	Communicate effectively with customers (A3)	5	5
4427-203	Give customers a positive impression of yourself and your organisation (A4)	5	5
4427-553	Promote additional services or products to customers (A5)	5	6
4427-554	Process information about customers (A6)	5	5
4427-555	Live up to the brand promise when delivering customer service (A7)	5	6
4427-556	Make customer service personal (A8)	5	6
4427-557	Go the extra mile in customer service (A9)	5	6
4427-209	Deal with customers face to face (A10)	5	5
4427-210	Deal with incoming telephone calls from customers (A11)	5	5
4427-558	Make telephone calls to customers (A12)	5	6
4427-559	Deal with customers using a social media platform (A19)	5	3

City & Guilds unit number	Group C Optional Units – Delivery	SCQF Level	SCQF Credit
4427-212	Deliver reliable customer service (B2)	5	5
4427-213	Deliver customer service on your customer's premises (B3)	5	5
4427-214	Recognise diversity when delivering customer service (B4)	5	5
4427-215	Deal with customers across a language divide (B5)	5	8
4427-560	Use questioning techniques when delivering customer service (B6)	5	4
4427-561	Deal with customers using bespoke software (B7)	5	5
4427-562	Maintain customer service through effective handover (B8)	5	4
4427-563	Deliver customer service in an environmentally friendly and sustainable way (B17)	5	3

City & Guilds unit number	Group D Optional Units – Handling Problems	SCQF Level	SCQF Credit
4427-564	Resolve customer service problems (C3)	5	6
4427-565	Deliver customer service to challenging customers (C4)	5	6
4427-610	Monitor and solve customer service problems (C5)	6	6
4427-311	Apply risk assessment to customer service (C6)	7	10
4427-710	Process customer service complaints (C7)	7	6

City & Guilds unit number	Group E Optional Units – Development and Improvement	SCQF Level	SCQF Credit
4427-566	Develop customer relationships (D1)	5	6
4427-222	Support customer service improvements (D2)	5	5
4427-223	Develop personal performance through delivering customer service (D3)	5	6
4427-224	Support customers using on-line customer services (D4)	5	5
4427-225	Buddy a colleague to develop their customer service skills (D5)	5	5
4427-567	Develop your own customer service skills through individual learning (D6)	5	6
4427-227	Support customers using self service technology (D7)	5	5

1.2   Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- SVQ in Customer Service at SCQF level 6
- Customer Service Apprenticeship
- SVQs in other work-related areas (for example Administration and other technical sectors)

1.3   Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Generic candidate recording forms	**www.cityandguilds.com**
Centre guide	**www.cityandguilds.com**
Promotional materials	**www.cityandguilds.com**
SmartScreen	**www.smartscreen.co.uk**

2   Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area
Centres approved to offer the qualification SVQ 2 in Customer Service at SCQF Level 5 (4427-02) will be given automatic approval for the new SVQ in Customer Service at SCQF Level 5 (4427-20). Existing sanctions will apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area
To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds
To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1   Resource requirements

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

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

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

To be able to assess candidates, Assessors **must**:

- be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period; AND have a full and

current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

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

Internal quality assurer (IQA)

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs. IQAs **must:**

- be 'occupationally competent'. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA4 and should be supported by a qualified IQA throughout their training period; AND demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process;

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

External quality assurer (EQA)

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying. EQAs **must:**

- be 'occupationally competent'. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA2 and should be supported by a qualified EQA throughout their training period; AND demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices

of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs

The Assessor, IQA and EQA working at SCQF Level 5 must have:	This can be evidenced by:	A	IQA	EQA
A thorough understanding of the National Occupational Standards in Customer Service at SCQF Level 5 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the CFA		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the CFA Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	joining the CFA	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for SVQ in Customer Service at SCQF Level 5	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service SVQ	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and SVQs at SCQF Level 5	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓

The Assessor, IQA and EQA working at SCQF Level 5 must have:	This can be evidenced by:	A	IQA	EQA
Appropriate Assessor and Verifier qualifications according to their role – within 18 months of working with the Standards for Assessors and IQAs and within 12 months for EQAs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the Assessor and/or Verifier qualification standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Employer Direct Model
The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their Awarding Organisation may choose between:

- achieving the appropriate regulatory body approved unit qualifications for assessment;

OR

- demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by the Awarding Organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

In order to use the employer direct model:
An organisation **must:**

- have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

- seek guidance and approval from an awarding organisation to demonstrate that they have:
- appropriate processes in place to facilitate assessment, moderation or verification functions
- carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

An Awarding Organisation **must**:
- offer this model to employers only
- supply information on the requirements for internal and external moderation/verification activities to assessment centres.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2   Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Realistic Working Environment (RWE)

This SVQ should be assessed using genuine workplace evidence. In exceptional circumstances, simulation may be used for **small parts** of the units at any level, and undertaken in a Realistic Working Environment (RWE).

Any RWE should be agreed in advance with the Awarding Organisation.

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) even for the small parts that may be agreed with the Awarding Organisation. operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.
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To undertake the assessment in a RWE the following guidelines must be met:

a   assessments must be carried out under realistic business pressures, using real customers and within a defined service offer

b   all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations

c   candidates must be expected to achieve a volume of work comparable to normal business practices

d   the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards

e   account must be taken of any legislation or regulations in relation to the type of work that is being carried out

f   candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at the relevant level

g   candidates must show that their productivity reflects those found in the work situation being represented

h   customer perceptions of the RWE is similar to that found in the work situation being represented

i   the RWE is managed as a real work situation.

All units must be achieved in a **real working situation (either paid or voluntary)**

Age restrictions

There are no age limits attached to candidates undertaking the qualification unless this is a legal requirement of the process or the environment.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:
- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

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

Centres may design course programmes of study in any way which:
- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:
- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:
- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen **www.smartscreen.co.uk**
- Useful material is available from **www.cfa.uk.com**

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

4.2 Evidence requirements

- Evidence requirements are included as part of the unit content in this document.

4.3 Recording forms

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

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

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the CFA April 2015 and can be located on their website **www.cfa.uk.com**

5 National Occupational Standards (NOS)

Availability of units

The Customer Service units for this qualification follow.

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- unit aim

Unit 203   Give customers a positive impression of yourself and your organisation (A4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your 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 your behaviour counts when dealing with a customer.

Unit 203   Give customers a positive impression of yourself and your organisation (A4)

Outcomes of effective performance

When you give customers a positive impression of yourself and your organisation you must consistently:

1   Meet your organisation's standards of appearance and behaviour
1a.   greet your customer respectfully and in a friendly manner
1b.   communicate with your customer in a way that makes them feel valued and respected
1c.   identify and confirm your customer's **expectations**
1d.   treat your customer courteously and helpfully at all times
1e.   keep your customer informed and reassured
1f.   adapt your behaviour to respond to different customer behaviour.

2   Respond appropriately to customers
2a.   respond promptly to a customer seeking help
2b.   choose the most appropriate way to communicate with your customer
2c.   check with your customer that you have fully understood their expectations
2d.   respond promptly and positively to your customer's questions and comments
2e.   allow your customer time to consider your response and give further explanation when appropriate.

3   Communicate information to customers
3a.   quickly find information that will help your customer
3b.   give your customer information they need about the services or products offered by your organisation
3c.   recognise information that your customer might find complicated and check whether they fully understand
3d.   explain clearly to your customers any reasons why their expectations cannot be met.

Unit 203 Give customers a positive impression of yourself and your organisation (A4)

Knowledge and understanding

To be competent at giving customers a positive impression of yourself and your organisation you must know and understand:

a. your organisation's standards for appearance and behaviour

b. your organisation's guidelines for how to recognise what your customer wants and respond appropriately

c. your organisation's rules and procedures regarding the methods of communication you use when dealing with customers

d. how to recognise when a customer is angry or confused

e. your organisation's standards for timeliness in responding to customer questions and requests for information.

Assessment guidance

Expectations: What the customer thinks they should experience or get.

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- job description*
- organisational documentation*
- organisational policies and procedures*
- legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 209   Deal with customers face to face (A10)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is all about the skills you need to deal with your customer in person and face to face. When you are working with a customer in this way, good feelings about the way you look and behave can improve how your customer feels about the transaction and give them greater satisfaction. Whilst verbal communication is important, your focus on your customer and the relationship that is formed also depends on the non-verbal communication that takes place between you. You have many opportunities to impress your customer and your behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

Unit 209 Deal with customers face to face (A10)

Outcomes of effective performance

When you deal with customers face to face you must consistently:

1 Communicate effectively with your customer

1a. plan a conversation with your customer that has structure and clear direction

1b. hold a conversation with your customer that establishes rapport

1c. focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation

1d. explain your services or products and your organisation's service offer to your customer clearly and concisely

1e. adapt your communication to meet the individual needs of your customer

1f. anticipate your customer's requests and needs for information

1g. balance conflicting demands for your attention whilst maintaining rapport with your current customer

1h. calm down situations when one customer is adversely affecting the customer service enjoyed by other customers.

2 Build rapport with your customer through body language

2a. present a professional and respectful image when dealing with your customer

2b. show an awareness of your customer's needs for personal space

2c. focus your attention on your customer so that non-verbal signs do not indicate disinterest, boredom or irritation

2d. ensure that your customer focus is not interrupted by colleagues

2e. observe all customers and the total customer service situation whilst maintaining rapport with your current customer

2f. observe your customer to read non-verbal clues about their wishes and expectations.

Unit 209   Deal with customers face to face (A10)

Knowledge and understanding

To be competent at dealing with customers face to face you must know and understand:

a.   the importance of speaking clearly and slowly when dealing with a customer face to face

b.   the importance of taking the time to listen carefully to what the customer is saying

c.   your organisation's procedures that impact on the way you are able to deal with your customers face to face

d.   the features and benefits of your organisation's services or products

e.   your organisation's service offer and how it affects the way you deal with customers face to face

f.   the principles of body language that enable you to interpret customer feelings without verbal communication

g.   the difference between behaving assertively, aggressively and passively

h.   why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction

i.   the agreed and recognised signs in customer behaviour, in your organisation, that indicate that your customer expects a particular action by you.

Evidence may be supplied by:

- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records *
- customer feedback*
- job description*
- organisational documentation*
- service offer*
- legislative requirements and organisational ethical policies**

Note: this unit is about dealing with customers face to face. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 210   Deal with incoming telephone calls from customers (A11)

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations deal with incoming telephone calls as a key part of their customer service. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, many calls start with customers in a negative frame of mind because they see 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 incoming call.

Unit 210 Deal with incoming telephone calls from customers (A11)

Outcomes of effective performance

When you deal with incoming telephone calls from customers you must consistently:

1   Use telecommunication systems effectively

1a.   operate telecommunication equipment efficiently and effectively

1b.   speak clearly and slowly and adapt your speech to meet the individual needs of your customer

1c.   listen carefully when collecting information from your customer

1d.   select the information you need to record and store following your organisation's guidelines

1e.   update customer records during or after the call to reflect the key points of the conversation.

2   Establish rapport with customers who are calling

2a.   greet your customer following your organisation's guidelines

2b.   listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call

2c.   confirm the identity of your customer following organisational guidelines

2d.   use effective and assertive **questions** to clarify your customer's requests.

3   Deal effectively with customer questions and requests

3a.   identify the options you have for responding to your customer and weigh up the benefits and drawbacks of each

3b.   choose the option that is most likely to lead to customer satisfaction within the **service offer**

3c.   give clear and concise information to customers in response to questions or requests

3d.   use questions and answers to control the length of the conversation

3e.   keep your customer informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time

3f.   put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague

3g.   summarise the outcome of the call and any actions that you or your customer will take as a result

3h.   check before the call is finished that your customer is content that all their questions or requests have been dealt with

3i.   complete any **follow up actions** agreed during the call

3j.   take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests

3k.   ensure that promises to call back are kept.

Unit 210   Deal with incoming telephone calls from customers (A11)

Knowledge and understanding

To be competent at dealing with incoming telephone calls from customers you must know and understand:

a.   your organisation's guidelines and procedures for the use of telecommunications system

b.   how to operate your organisation's telecommunications system

c.   the importance of speaking clearly and slowly when dealing with customers by telephone

d.   the effects of smiling and other **facial expressions** that can be detected by somebody listening to you on the telephone

e.   the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand

f.   what information it is important to note during or after telephone conversations with customers

g.   your organisation's guidelines and procedures for what should be said during telephone conversations with customers

h.   the importance of keeping your customer informed if they are on hold during a call

i.   the importance of not talking across an open line

j.   what details should be included if taking a message for a colleague

k.   your organisation's guidelines and procedures for taking action to follow up calls made to customers

l.   your organisation's guidelines for handling **abusive** calls.

Assessment guidance

Questions
- open
- probing
- closed

Service offer
- what the organisation says it will deliver
- defines the extent and the limits of service eg refund policy

Post call follow up actions: eg
- complete administration
- update records
- pass information on to others

Abusive eg customer shouting or swearing, making lewd comments, being aggressive

Body language and facial expressions used when dealing with customers can show:
- confidence or lack of it
- anger or aggression
- nervousness
- abruptness
- boredom
- interest or disinterest
- empathy
- compassion

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- product/service information*
- organisational documentation, policies and procedures*
- manuals*
- legislative requirements and organisational ethical policies**

Note: This unit is about dealing with incoming telephone calls and not outgoing which is covered in unit 211. Here the candidate will require to be observed dealing with incoming calls. Witness testimonies can be used to ensure the evidence is over time.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.
**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The

candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 212 Deliver reliable customer service (B2)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is all about how you deliver consistent and reliable service to customers. As well as being good with people, you need to work with your organisation's service systems to meet or exceed customer expectations. In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations. To meet this standard, you have to deliver excellent customer service over and over again.

Unit 212   Deliver reliable customer service (B2)

Outcomes of effective performance

When you deliver reliable customer service you must consistently:

1   Prepare to deal with your customers

1a.   keep your knowledge of your organisation's services or products up-to-date

1b.   ensure that the area you work in is tidy, safe and organised efficiently

1c.   prepare and arrange everything you need to deal with your customers before your shift or period of work commences.

2   Give consistent service to customers

2a.   make realistic customer service promises to your customers

2b.   ensure that your **promises balance** the needs of your customers and your organisation

2c.   keep your promises to your customers

2d.   inform your customers if you cannot keep your promises due to unforeseen circumstances

2e.   recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements

2f.   keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation.

3   Check customer service delivery

3a.   check that the service you have given meets your customers' needs and expectations

3b.   identify when you could have given better service to your customers and how your service could have been improved

3c.   share information with colleagues and service partners to maintain and improve your standards of service delivery.

Unit 212　　Deliver reliable customer service (B2)

Knowledge and understanding

To be competent at delivering reliable customer service you must know and understand:

a.　your organisation's services or products

b.　your organisation's procedures and systems for delivering customer service

c.　methods or systems for measuring an organisation's effectiveness in delivering customer service

d.　your organisation's procedures and systems for checking service delivery

e.　your organisation's requirements for health and safety in your area of work.

Assessment guidance

Balancing promises: Deciding when the promises can be met by the organisation and when it is not viable for the organisation to do what the customer wants either financially or practically.

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- knowledge base content*
- service offer*
- marketing materials
- manuals*
- documentation*
- schedules/rotas/daily plan
- legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 213 Deliver customer service on your customer's premises (B3)

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully. This unit is not simply about working in a different building. Your customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for you if your job takes you into your customers' homes.

Unit 213   Deliver customer service on your customer's premises (B3)

Outcomes of effective performance
When you deliver customer service on your customer's premises you must consistently:

1   Establish a rapport with your customer

1a.   **prepare** for a visit to your customer's premises and ensure they know when and why you will be there

1b.   **identify yourself** to your customer showing official identification whenever possible

1c.   show a positive and friendly approach to the service you are about to give

1d.   use **language and behaviour** that show respect for your customer

1e.   explain to your customer exactly what you are going to do and approximately how long you expect the work to take

1f.   listen to any concerns that your customer may have and reassure them

1g.   keep your customer informed of progress and about any cause for delay that might take place

1h.   keep your customer informed of any variation to the work that could involve additional time or cost

1i.   consult your customer when you have to do work that they had not expected.

2   Combine customer service with your other skills and expertise

2a.   show respect to your customer's premises and possessions by treating them with care

2b.   make sure your customer is aware of your specialist technical skills

2c.   take time to give your customer confidence in your knowledge and skills

2d.   consider the customer service implications of each action and inform your customer of what will be involved

2e.   inform your customer when you have finished and reinforce how the work has been handled professionally

2f.   check that your customer is satisfied with the work and listen carefully to any feedback

2g.   inform your customer of timescales if any follow up work is involved

2h.   ensure that timescales for follow up work are kept

2i.   keep your customer informed if timescales for follow up work are not going to be met

2j.   explain clearly to your customer why you cannot do work that is not specified in the service offer

2k.   ensure that your customer has the appropriate details to contact your organisation if they need to.

Unit 213　Deliver customer service on your customer's premises (B3)

Knowledge and understanding

To be competent at delivering customer service on your customer's premises you must know and understand:

a.　what you can do to establish a rapport with customers

b.　the importance of sensitivity to people's feelings about their own premises and possessions

c.　the **regulatory and legal restrictions** on what you can and cannot do in all aspects of your work

d.　the insurance implications of working on your customer's premises

e.　the organisational procedures you would take if you cause any accidental damage on your customer's premises.

Assessment guidance

Preparations: eg
- preparing paperwork and/or materials
- making a pre-call to confirm the visit
- checking the schedule
- packing materials for delivery

Identify themselves to customers: It is important to ensure customers are correctly greeted and shown personal credentials/identity card or similar.

Organisational standards of behaviour and communication:
- dress code
- uniform to be worn
- any special dress code when entering a customer's premises eg shoes, gloves, PPE
- behaviour including language to be used and what should not be used

Legislation:
- Health and Safety at Work Act • Equality Act • Data Protection Act

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- marketing materials
- manuals*
- documentation*
- schedules/rotas/daily plan
- legislative requirements and organisational policies and procedures*

Note: this unit is about delivering customer service whilst working on customers' premises which could be residential or business premises. The candidate could be eg carrying out work on the premises, caring for a customer in their premises or delivering goods into the premises. Here the candidate will require to be observed preparing for a visit(s) and then delivering customer service on customer's premises. This requires to be carried out on more than one occasion. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 214   Recognise diversity when delivering customer service (B4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from your customer. This unit is about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

Unit 214   Recognise diversity when delivering customer service (B4)

Outcomes of effective performance

When you recognise diversity when delivering customer service you must consistently:

1   Respect customers as individuals and promote equality in customer service

1a.   observe verbal and non-verbal clues that provide information about your customer's expectations and needs

1b.   identify and avoid features of stereotypes that might be applied to your customer and could carry the risk of causing offence

1c.   identify aspects of your customer's appearance or communication which risk leading you to treat them differently

1d.   consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer

1e.   question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence

1f.   adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer.

2   Adapt customer service to recognise the different needs and expectations of diverse groups of customers

2a.   follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers

2b.   show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group

2c.   vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group

2d.   work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group.

Unit 214 Recognise diversity when delivering customer service (B4)

Knowledge and understanding

To be competent at recognising diversity when delivering customer service you must know and understand:

a. the importance of recognising diversity in relation to **legal,** regulatory, ethical and social requirements

b. reasons why consideration of diversity and inclusion issues affect customer service

c. organisational guidelines to make customer service inclusive for diverse groups of customers

d. how to observe and interpret non-verbal clues

e. how to listen actively for clues about your customer's expectations and needs

f. techniques for obtaining additional information from customers through tactful and respectful questions

g. behaviour that might cause offence to specific groups of people to whom you regularly provide customer service

h. how to impress specific groups of people to whom you regularly provide customer service.

Assessment guidance

Legal:

- Health and Safety at Work Act • Equality Act • Data Protection Act

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- manuals*
- organisational documentation*
- legislative requirements and organisational policies and procedures*

Note: this unit is about recognising diversity when delivering customer service. This requires the candidate to be observed dealing with a variety of customers over time. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 215   Deal with customers across a language divide (B5)

Level: **5**

Credit value: **8**

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language. You should choose this unit if you frequently deal across a language divide. Do not choose this unit if you come across customers who do not share your first language only occasionally.

Unit 215 Deal with customers across a language divide (B5)

Outcomes of effective performance

When you deal with customers across a language divide you must consistently:

1 Prepare to deal with customers with a different first language

1a. identify the language or languages other than your own that you are most likely to come across when dealing with customers

1b. learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter

1c. identify a source of assistance with a language you expect to encounter when delivering customer service

1d. agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language

1e. log useful words and phrases to support your dealings with a customer with a different first language

1f. learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently.

2 Deal with customers who speak a different first language from your own

2a. identify your customer's first language and indicate to them that you are aware of this

2b. establish the expectations of your customer regarding whether they expect to deal in your first language or theirs

2c. speak clearly and slowly if using a language which is not the first language for either you or your customer

2d. maintain a consistent tone and volume when dealing with somebody across a language divide

2e. listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words

2f. check your understanding of specific words with your customer, using questions for clarification

2g. seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers

2h. reword a question or explanation if your customer clearly does not understand your original wording

2i. use a few words of your customer's first language to create a rapport.

Unit 215   Deal with customers across a language divide (B5)

Knowledge and understanding

To be competent at dealing with customers across a language divide you must know and understand:

a.   which languages you are most likely to encounter among groups of your customers

b.   how to greet, thank and say farewell to customers in their first languages

c.   the importance of dealing with customers in their first language if possible

d.   how to explain to a customer that you cannot hold an extended conversation in their first language

e.   the importance of tone, pace and volume when dealing with customers across a language divide

f.   possible sources of assistance to use when a language barrier demands additional language skills.

Assessment guidance

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- sources of assistance*
- organisational documentation*
- legislative requirements and organisational policies and procedures*

Note: This requires the candidate to be observed dealing with customers across a language divide. It will require the candidate to be in a work situation that allows contact with a variety of customers who speak a different first language from their own. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 222 Support customer service improvements (D2)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved. This unit is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

Unit 222   Support customer service improvements (D2)

Outcomes of effective performance

When you support customer service improvements you must consistently:

1   Use feedback to identify potential customer service improvements

1a.   gather informal feedback from your customers

1b.   use your organisation's procedures to collect feedback from your customers

1c.   use the information from your customers to develop a better understanding of their customer service experience

1d.   identify ways the service you give could be improved based on information you have gathered

1e.   share your ideas for improving customer service with colleagues.

2   Implement changes in customer service

2a.   identify a possible change that could be made to improve customer service

2b.   present your idea for improving customer service to a colleague with the appropriate authority to approve the change

2c.   carry out changes to customer service procedures based on your own idea or proposed by your organisation

2d.   keep your customers informed of changes to customer service

2e.   give customers a positive impression of changes that have been made

2f.   work positively with others to support customer service changes.

3   Assist with the evaluation of changes in customer service

3a.   discuss with others how changes to customer service are working

3b.   work with others to identify any negative effects of changes and how these can be avoided.

Unit 222   Support customer service improvements (D2)

Knowledge and understanding

To be competent at supporting customer service improvements you must know and understand:

a.   how customer experience is influenced by the way service is delivered

b.   how customer feedback is obtained

c.   how to work with others to identify and support change in the way service is delivered

d.   why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them.

Assessment guidance

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- change management plan
- evaluation results
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: This unit is about supporting customer service improvements Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently support customer service improvements.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 223 Develop personal performance through delivering customer service (D3)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Delivering customer service presents many opportunities for learning and for developing personal skills. This unit is about how you can develop your personal skills at the same time as improving your customer service performance. You must plan together with a manager or mentor and then carry out activities which help you learn and develop in your customer service role. Customer service improvements rely on continuous improvement and this includes improving your own skills.

Unit 223   Develop personal performance through delivering customer service (D3)

Outcomes of effective performance

When you develop personal performance through delivering customer service you must consistently:

1   Review performance in your customer service role

1a.   work with an appropriate person to establish what you need to know, understand and be able to do, in order to work effectively in your customer service role

1b.   identify and review situations from your own positive and negative experiences as a customer

1c.   carry out a self assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs.

2   Prepare a personal development plan and keep it up to date

2a.   agree your strengths, weaknesses and development needs with an appropriate person

2b.   work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role

2c.   develop a customer service personal development plan

2d.   regularly review your progress towards your objectives with an appropriate person.

3   Undertake development activities and obtain feedback on your customer service performance

3a.   complete development activities identified in your customer service personal development plan

3b.   use your day to day experiences with your customers and your own experiences as a customer to develop your customer service performance

3c.   obtain feedback from an appropriate person about your customer service performance

3d.   review and update your customer service personal development plan.

Unit 223 Develop personal performance through delivering customer service (D3)

Knowledge and understanding

To be competent at developing personal performance through delivering customer service you must know and understand:

a.   your organisation's systems and procedures for developing personal performance in customer service

b.   how your behaviour has an effect on the behaviour of others

c.   how effective learning depends on a process of planning, doing and reviewing

d.   how to review effectively your personal strengths and development needs

e.   how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service

f.   how to access sources of information and support for your learning

g.   how to obtain useful and constructive personal feedback from others

h.   how to respond positively to personal feedback.

Assessment guidance

Evidence may be supplied by:
   • witness testimony
   • observation
   • questioning
   • professional discussion
   • feedback on personal activities
   • personal development plan
   • self-assessment
   • records of development activities
   • organisational policies and procedures*
   • legislative and regulatory requirements*
   • organisational documentation*

Note: This unit is about developing personal performance through delivering customer service.

Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently develop personal performance through delivering customer service.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 224 Support customers using on-line customer services (D4)

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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 you in understanding what your 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 your customer is unable to discover how it can deliver what they want. This unit is for you if one part of your job involves helping customers to find their way through on-line systems.

Unit 224   Support customers using on-line customer services (D4)

Outcomes of effective performance

When you support customers using on-line customer services you must consistently:

1 Establish the type and level of support your customer needs to achieve on-line customer service

1a. ensure that you are completely familiar and up-to-date with the on-line services that your customers use

1b. listen carefully to what your customer is trying to achieve

1c. listen carefully to what your customer is having difficulties with

1d. question your customer to discover their degree of familiarity with the system

1e. offer your customer the option of trying the on-line approach once more

1f. agree with your customer the exact nature of their problem and steps that may be taken to overcome it.

2 Support on-line customer service in conversation with your customer

2a. explore the on-line customer system in order to develop your own knowledge and skills in its use

2b. step through the screen sequence with your customer whilst allowing them to operate the system for themselves

2c. address your customer in an understanding and supportive manner

2d. explain to your customer why certain steps are required in the process

2e. offer the options to your customer of taking them through the process or completing the transaction yourself

2f. promote access to additional services or products when supporting customers on-line.

Unit 224   Support customers using on-line customer services (D4)

Knowledge and understanding

To be competent at supporting customers using on-line customer services you must know and understand:

a. how your organisation's system for on-line service delivery works

b. the importance of close active listening to discover what your customer is trying to achieve

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

d. why it is generally preferable for your customer to complete a transaction for themselves

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

f. the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself

g. additional services or products that may be promoted to on-line customers.

Assessment guidance

Evidence may be supplied by:
- witness testimony
- observation
- questioning
- professional discussion
- manuals and instructions*
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: Here candidates are required to support customers using on-line customer services. Here the candidate will require to be observed supporting a variety of customers. Witness testimonies and other forms of evidence can also be used.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 225　　Buddy a colleague to develop their customer service skills (D5)

Level:　　　5

Credit value:　5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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 you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

Unit 225   Buddy a colleague to develop their customer service skills (D5)

Outcomes of effective performance

When you buddy a colleague to develop their customer service skills you must consistently:

1   Plan and prepare to buddy a colleague

1a.   agree with your colleague aspects of their work which may benefit most from your buddying support

1b.   your understanding of your colleague's job tasks and responsibilities using reliable sources

1c.   clarify the customer service image and impression your colleague should present in their job

1d.   arrange times when it will be most helpful to work alongside your colleague

1e.   plan details of a buddy session to support your colleague on the job.

2   Support your buddy colleague on the job

2a.   agree with your colleague where you will be placed near them when buddying them on the job

2b.   ensure your presence when your buddy is dealing with customers does not detract from effective customer service

2c.   carry out customer service tasks in the presence of your buddy colleague to set an example they can follow

2d.   observe your colleague closely to identify what they do well and areas in which they could improve

2e.   discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement

2f.   praise your colleague on aspects of their work which they have carried out well

2g.   explain to your colleague ways in which they can improve their customer service performance

2h.   make notes on your colleague's strengths and areas for development that you can discuss with them.

3   Provide buddy support off the job

3a.   arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers

3b.   identify areas of general interest that help to establish rapport with your buddy colleague

3c.   use notes made when observing your colleague to discuss positive and negative aspects of their performance

3d.   agree actions your buddy colleague can take to improve their customer service performance

3e.   offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience.

Unit 225   Buddy a colleague to develop their customer service skills (D5)

Knowledge and understanding

To be competent at buddying a colleague, to develop their customer service skills, you must know and understand:

a.   the tasks in your buddy colleague's job

b.   areas of the job that benefit most from buddying support

c.   the customer service image and impression that should be presented in your buddy colleague's job

d.   the best times at which to work alongside your buddy colleague

e.   ways to work alongside your buddy colleague without intruding on the customer relationship

f.   techniques for giving positive feedback and constructive criticism to your buddy colleague

g.   the importance of establishing an effective rapport with your buddy colleague

h.   options for actions your buddy colleague can take to improve their customer service performance.

Assessment guidance

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- records on support and feedback
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: This unit is about buddying and not managing a colleague. Here candidates are required to buddy a colleague to develop their customer service skills.

Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently buddy a colleague, to develop their customer service skills.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 227 Support customers using self-service technology (D7)

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, you must be able to recognise what help and intervention is needed and to provide that in a way that pleases your customer and builds their confidence in the use of the equipment. This unit is right for you if any part of your job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

Unit 227   Support customers using self-service technology (D7)

Outcomes of effective performance

When you support customers using self-service technology you must consistently:

1   Identify the type of help needed by a customer using self-service technology

1a.   prepare a standard demonstration of using the self-service equipment

1b.   prepare to answer frequently asked questions about the operation of the self-service equipment

1c.   identify signs of when a customer is having difficulty with the self service equipment

1d.   choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment.

2   Assist a customer using self-service technology

2a.   maintain a professional, polite and approachable manner while you observe customers using self-service technology

2b.   demonstrate use of the self-service equipment to a customer

2c.   respond to a request for help from a customer using self-service equipment

2d.   make use of staff override options to clear self-service equipment for use by customers

2e.   talk a customer through use of the self-service equipment whilst allowing them to operate it

2f.   invite a customer to repeat the operation of the self-service equipment if that helps them to learn

2g.   make positive and encouraging comments to a customer who is learning to use the self-service equipment

2h.   explain to your customer why certain actions and steps are needed to operate self service equipment

2i.   troubleshoot problems with self-service equipment and report errors and issues to appropriate people.

Unit 227 Support customers using self-service technology (D7)

Knowledge and understanding

To be competent at supporting customers using self-service technology you must know and understand:

a. reasons why your organisation chooses to offer customers self-service equipment

b. all aspects of normal operation of the customer self-service equipment

c. frequently asked questions about operation of the self-service equipment and effective answers to those questions

d. techniques for giving an effective demonstration of self-service equipment

e. signals and signs that a customer needs help with self-service equipment

f. organisational procedures for using staff intervention to clear self-service equipment

g. the importance of building customer confidence in using self-service equipment

h. organisational procedures for dealing with self-service equipment problems.

Assessment guidance

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- manuals and instructions
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: Here candidates are required to support customers using self-service technology. They will be required to be observed dealing with a variety of customers. Witness testimonies and other forms of evidence can be also used.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 311 Apply risk assessment to customer service (C6)

Level: 7

Credit value: 10

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Unit 311 Apply risk assessment to customer service (C6)

Outcomes of effective performance

When you apply risk assessment to customer service you must consistently:

1 Analyse customer service processes for risk

1a. identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers

1b. identify the financial risks in each stage of the customer service process

1c. identify the reputational risks in each stage of the customer service process

1d. identify the health and safety risks for each stage of the customer service process

1e. identify the risk of delivering sub-standard services or products in each stage of the customer service process

1f. ensure that your customers are aware of any risks that might impact on them

1g. develop staff awareness of the risks you have identified.

2 Assess customer service risks and take appropriate actions

2a. assess the probabilities of each risk that you have identified

2b. assess the potential consequence of each risk in terms of finance, reputation and health and safety

2c. classify each risk as high, medium or low taking into account its probability and potential consequences

2d. work with colleagues to identify any actions that might be taken to reduce risk

2e. take appropriate actions to minimise the overall customer service risk profile by adapting procedures.

Unit 311 Apply risk assessment to customer service (C6)

Knowledge and understanding

To be competent at applying risk assessment to customer service you must know and understand:

a. your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)

b. risk assessment techniques

c. how to evaluate risk using the probability of occurrence and consequences of occurrence

d. the nature of potential customer service risks including financial, reputational and health and safety risks

e. cost/benefit analysis

f. SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis.

Assessment Guidance

Evidence may be supplied by:
- witness testimony
- observation
- questioning
- professional discussion
- organisational documentation
- organisational policies and procedures*
- legislative and regulatory requirements*

Note: Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they competently apply risk assessment to customer service.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 450 Communicate in a customer service environment (F1)

Level: 4
Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

You need to be able to communicate with customers and colleagues using language and concepts that they can understand. This unit is about the language and basic principles that are the heart of customer service and the skills you need to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service. You need to be able to describe and explain the services or products that your organisation offers and how it delivers customer service. This means that you need to use the right language to describe customer service and describe why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Using that language, the unit will help you to understand how you and your job fit in. Everybody involved in customer service needs to know the customer service content of their job.

Unit 450 Communicate in a customer service environment (F1)

Outcomes of effective performance

When you communicate in a customer service environment you are able to:

1 Identify customers and their characteristics and expectations

1a. recognise typical customers and their expectations

1b. discuss customer expectations with colleagues using recognised customer service language

1c. follow procedures through which you and your colleagues deliver effective customer service.

2 Identify your organisation's services and products

2a. outline your organisation's services and products to customers

2b. list the information you need to deliver effective customer service and where that information can be found

2c. discuss with colleagues the part you play in delivering your organisation's service offer.

Unit 450 Communicate in a customer service environment (F1)

Knowledge and understanding

To be competent at communicating in a customer service environment you must know and understand:

a. who your customers are and the differences between an internal customer and an external customer

b. your organisation's services or products and how to find information about them

c. the connection between customer expectations and customer satisfaction in customer service

d. why good customer service is important to any organisation

e. why organisational procedures and teamwork are important to good customer service

f. the service offer of your organisation and the part you play in delivering it

g. who's who and who does what in delivering customer service in your organisation

h. the main characteristics of typical customers that you deal with, what impresses them and what might upset or annoy them

i. the kinds of information you need to give good service to customers

j. typical customer service problems in your work and who should be told about them

k. how the way you behave affects your customer's service experience.

Unit 551   Deliver customer service within the rules (F2)

Level: 5
Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This unit requires you to show that you know and understand all of the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

Unit 551   Deliver customer service within the rules (F2)

Outcomes of effective performance
When you deliver customer service within the rules you must consistently:

1   Follow your organisation's customer service practices and procedures
1a.   follow organisational practices and procedures that relate to your customer service work
1b.   recognise the limits of what you are allowed to do when delivering customer service
1c.   refer to somebody in authority when you need to
1d.   work in a way that protects the security of customers and their property
1e.   work in a way that protects the security of data relating to your customers.

2   Follow legislation and external regulation that relate to customer service
2a.   work in a way that is safe for your customers and your colleagues
2b.   treat customers equally
2c.   respect confidentiality relating to customers and the organisation
2d.   work in a way that shows you are aware of the areas of your job that are covered by **legislation** and the things you must not do
2e.   work in a way that shows you are aware of the main **external regulations** that apply to your job and the things you must not.

Unit 551   Deliver customer service within the rules (F2)

Knowledge and understanding

To be competent at delivering customer service within the rules you must know and understand:

a.   organisational practices and procedures that relate to your customer service work

b.   the limits of what you are allowed to do when delivering customer service

c.   when and how you should refer to somebody in authority about the rules for delivering customer service

d.   how you protect the security of customers and their property

e.   how you protect the security of information about customers

f.   your health and safety responsibilities as they relate to your customer service work

g.   your responsibilities to deliver customer service treating customers equally

h.   why it is important to respect customer and organisation confidentiality

i.   the main things you must do and not do in your job under **legislation** that affects your customer service work

j.   the main things that you must do and not do in your job under **external regulations** that affect your customer service work.

Assessment guidance

Consumer-related legislation
- Consumer Credit Act 2006
- Misrepresentation Act 1967
- Sale of Goods Act 1979 and 2002
- Consumer Protection Act 1987
- Trades Descriptions Act 1968 Health, safety and environmental legislation
- Health and Safety at Work Act 1979

Equality legislation
- The Equality Act 2010 Legislation

Data Protection
- The Data Protection Act 1998

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- job description*
- organisational documentation*
- organisation chart*
- legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 552   Communicate effectively with customers (A3)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

To provide good customer service you need to understand what your customers want and how they feel. This means that you need to share information with them and listen carefully to them. Your customers need to understand what you are telling them and what you are able to do for them. Communication is an essential skill for delivering good customer service.

Unit 552   Communicate effectively with customers (A3)

Outcomes of effective performance
When you communicate effectively with customers you must consistently:

1   Communicate effectively with customers
1a.   listen actively to what customers are saying
1b.   identify the most important things that customers are telling you
1c.   respond appropriately to what customers are telling you
1d.   check that you understand what customers are telling you and make sure it is really what they mean
1e.   summarise information for customers
1f.   explain in a way that is clear and does not cause offence when you cannot help a customer
1g.   use an appropriate **tone** when communicating with your customers
1h.   use appropriate **body language** when communicating with customers
1i.   read your customers' body language to help you understand their feelings and wishes
1j.   deal with customers in a respectful, helpful and professional way at all times
1k.   help to give good customer service by passing messages to colleagues
1l.   use appropriate styles when dealing with customers through different media.

Unit 552   Communicate effectively with customers (A3)

Knowledge and understanding

To be competent at communicating effectively with customers you must know and understand:

a.   the difference between hearing and listening

b.   how to listen actively

c.   how to read both positive and negative **body language**

d.   how to use body language effectively

e.   how to use questions to check that you understand what customers are telling you

f.   the difference between negative and positive language

g.   how to summarise information

h.   why it is important to speak clearly

i.   why it is important to use words your customer will understand

j.   how to communicate with customers who have language, dialect or accents that are different from yours

k.   why the way you say things and your **tone of voice** affect the way your customer experiences your customer service

l.   what information is helpful to pass on in messages to colleagues so that customers receive good service

m.   the styles that are appropriate for communicating in the social media you are using and the customers you are dealing with.

Assessment guidance

The tone of voice, choice of expression and **body language** used when dealing with customers can show:
- confidence or lack of it
- anger or aggression
- nervousness
- abruptness
- boredom
- interest or disinterest
- empathy
- compassion

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- organisational documentation*
- organisation chart*
- legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 553   Promote additional services or products to customers (A5)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your 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 your need to keep pace with new developments and to encourage your 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 your organisation. Because of this, everybody offering services or products needs to play a part in making customers aware of what is available. You should not choose this unit if your role does not encourage you to suggest additional services or products to customers.

Unit 553 Promote additional services or products to customers (A5)

Outcomes of effective performance

When you promote additional services or products to customers you must consistently:

1   Identify additional services or products that are available

1a.   update and develop your knowledge of your organisation's services or products

1b.   check with others when you are unsure about new service or product details

1c.   identify appropriate services or products that may interest your customer

1d.   spot opportunities for offering your customer **additional services or products** that will improve their customer experience.

2   Inform customers about additional services or products

2a.   choose the best time to inform your customer about additional services or products

2b.   choose the best method of communication to introduce your customer to additional services or products

2c.   give your customer accurate and sufficient information to enable them to make a decision about the additional services or products

2d.   give your customer time to ask questions about the additional services or products.

3   Gain customer commitment to using additional services or products

3a.   close the conversation if your customer shows no interest in additional services or products

3b.   give information to move the situation forward when your customer shows interest in additional products or services

3c.   secure customer agreement and check customer understanding of the delivery of additional services or products

3d.   take action to ensure prompt delivery of the additional services or products to your customer

3e.   refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility.

Unit 553 Promote additional services or products to customers (A5)

Knowledge and understanding

To be competent at promoting additional services or products to customers you must know and understand:

a.   your organisation's procedures and systems for encouraging the use of additional services or products

b.   how additional services or products will benefit your customers

c.   how your customer's use of additional services or products will benefit your organisation

d.   the main factors that influence customers to use your services or products

e.   how to introduce additional services or products to customers by outlining their benefits and overcoming reservations

f.   how to give appropriate, balanced information to customers about services or products

g.   the importance of the influence of others when you are promoting additional services or products to customers.

Assessment guidance

Additional products and/or services:
- cross selling – to suggest a related product or service eg a toothbrush when the customer is buying toothpaste
- up-selling eg when you try to sell a more expensive product or service than the one the customer was originally interested in

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- product/service information*
- organisational documentation, policies and procedures*
- customer feedback*
- legislative requirements and organisational ethical policies**

Note: this unit is about promoting additional products and/or services to customers. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 554 Process information about customers (A6)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

You and your organisation need information about your customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer information is collected from your customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case, you 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.

Unit 554 Process information about customers (A6)

Outcomes of effective performance

When you process information about customers you must consistently:

1 Collect information about customers

1a. collect and record new information about customers following your organisation's guidelines

1b. update existing information about customers

1c. record and store information about customers that is accurate, sufficient and relevant following organisational guidelines.

2 Select and retrieve information about customers

2a. respond promptly to authorised requests for information about customers

2b. select and retrieve relevant information for customers or colleagues following your organisation's guidelines.

3 Supply information about customers

3a. supply accurate and sufficient information about customers to meet your customers or colleagues' expectations

3b. choose the most appropriate way to supply information to your customers or colleagues

3c. confirm that your customers or colleagues have received and understood the customer information.

Unit 554 Process information about customers (A6)

Knowledge and understanding

To be competent at processing information about customers you must know and understand:

a. your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
b. types of personal information about customers that should and should not be kept on record
c. how to collect and validate information about customers efficiently and effectively
d. how to operate the customer information storage system
e. why processing information about customers correctly makes an important contribution to effective customer service
f. the importance of attention to detail when processing information about customers
g. legal and regulatory restrictions on the storage and use of customer data.

Assessment guidance

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- organisational documentation, policies and procedures*
- customer feedback*
- legislative requirements and organisational ethical policies**

Note: this unit is about processing information about customers. Here the candidate will require to be observed over time dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 555 Live up to the brand promise when delivering customer service (A7)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and the services and products of your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
You may work in an organisation that has a carefully defined brand and vision which includes a specific service offer and promise to your customers. Often, much work has taken place to develop these, and they influence what your customer expects. That service offer and promise are all part of the brand. By promoting the brand, the organisation is making a promise to your customers about what they can expect. Customer satisfaction is unlikely to be achieved if your customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have defined expectations. This unit is about the way your work supports the branding of your services or products. It covers what you must do to make sure that you deliver the promise that your customer has come to expect. It also covers how you can avoid giving your customer an experience that is significantly different from the one offered in the promise.

Unit 555   Live up to the brand promise when delivering customer service (A7)

Outcomes of effective performance

When you live up to the brand promise you must consistently:

1   Understand and explain the customer service promise

1a.   explain the key features of the **service offer**, vision and promise your organisation has made and which represents its **brand**

1b.   identify the role you can play to ensure that your customer believes that the brand promise is being delivered

1c.   explain the procedures and regulations your organisation follows to support the brand

1d.   devise and use phrases that reinforce the brand

1e.   identify and avoid phrases that might be used, but would not fit with the brand

1f.   identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered

1g.   share ideas with colleagues about how particular words and approaches help to support the brand.

2   Produce customer satisfaction by delivering the customer service promise

2a.   ensure that your appearance and behaviour supports the organisation's brand

2b.   observe or listen to your customer closely to identify opportunities to reinforce their understanding of the brand promise

2c.   take actions to deliver customer service in a way that meets your customer's expectations and understanding of the brand promise

2d.   ensure that what you decide to do is realistic and in line with the brand promise and customer expectations

2e.   be positive and supportive about the **brand promise**.

Unit 555 Live up to the brand promise when delivering customer service (A7)

Knowledge and understanding

To be competent at living up to the brand promise you must know and understand:

a.   the **brand promise** made by your organisation's promotional materials

b.   the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's **brand**

c.   ways in which staff can contribute to communicating the brand promise to customers

d.   sales, marketing and/or public relations reasons for defining a brand

e.   how words can be used and adapted to reflect a brand promise

f.   the importance of using words and phrases that reinforce the brand

g.   how a brand promise is affected by social media exchanges

h.   how actions can be used and adapted to reflect a brand promise.

Assessment guidance

Service offer
- what the organisation says it will deliver
- defines the extent and the limits of service eg refund policy

Brand: A brand is the way in which an organisation's products, services are identified.

Brand promise: Branding is the way a product or service is recognised and is the promise made by the organisation to its customer. When a customer sees a particular brand they trust it assists them when making buying decisions as they know what to expect. If they do not recognise the brand they will have no clear expectations of the product or service and will almost be taking a risk on any purchase or usage.

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer/brand promise*
- product/service information and marketing materials*
- organisational documentation, policies and procedures*
- customer feedback*
- legislative requirements and organisational ethical policies**

Note: this unit is about living up to the brand promise when delivering customer service. Here the candidate will require to be observed over time dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 556 Make customer service personal (A8)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction. This unit is about how you can help your customers feel that they have experienced service that focuses on them as an individual. When you work with a customer you need to make them feel that it is on a 'one to one' basis, that you care what happens to them and that you respect them as an individual.

Unit 556 Make customer service personal (A8)

Outcomes of effective performance

When you make customer service personal you must consistently:

1 Identify opportunities for making customer service personal

1a. identify which of your organisation's systems or procedures allows you to add a personal touch to your service

1b. observe and listen to your customer carefully for signs that will guide how you personalise the service

1c. let your customer know that you understand and that you are there to help

1d. identify opportunities to help or direct your customer outside of normal routines and procedures

1e. identify customers with particular needs who would especially appreciate personal service

1f. balance the time you take when giving individual attention to one customer with the needs and expectations of other customers

1g. make extra efforts to show how willing and able you are to give a more personal service.

2 Treat your customer as an individual

2a. greet and deal with your customer in a way that respects them as an individual

2b. focus your attention on the customer you are dealing with

2c. always communicate with your customer in a friendly and open way

2d. use your customer's name when it is known and appropriate

2e. follow your organisation's guidelines about giving your customer your own name and contact details

2f. concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected.

Unit 556   Make customer service personal (A8)

Knowledge and understanding

To be competent at making customer service personal you must know and understand:

a.   how use of your customer's name makes service more personal

b.   personality types and their receptiveness to personalised services

c.   types of personal information about customers that should and should not be kept on record

d.   features of personal service that are most appreciated by customers with individual needs

e.   body language and approaches to communication that are generally interpreted as open

f.   your organisation's guidelines on actions that are permissible outside of the normal routines and procedures

g.   your own preferences and comfort levels relating to how you are willing and able to personalise service

h.   the boundaries beyond which personal customer service may be seen as inappropriate

i.   how to assess your customer's reaction to personalised customer service

j.   how to gain information about a customer's preferences, including through social media.

Assessment guidance

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- product/service information*
- organisational documentation, policies and procedures*
- customer feedback*
- legislative requirements and organisational ethical policies**

Note: this unit is about making customer service personal. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 557 Go the extra mile in customer service (A9)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you 'go the extra mile' must be within your own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has 'gone the extra mile' to deliver special customer service.

Unit 557 Go the extra mile in customer service (A9)

Outcomes of effective performance
When you go the extra mile in customer service you must consistently:

1 Distinguish between routine service and going the extra mile
1a. explain the service offer clearly and concisely
1b. identify your customer's **expectations and needs**
1c. match **the service offer** with your customer's expectations and needs and identify the key differences
1d. identify options for other actions that will give added value customer service and might impress your customer
1e. choose actions that are most appropriate to impress your customer.

2 Check that your extra mile ideas are feasible
2a. match your ideas for added value customer service against your authority to see them through
2b. check that your ideas for added value customer service are allowed within your organisation's guidelines and by external regulations
2c. check that your ideas for added value customer service will not affect the service to your other customers
2d. explain your ideas for added value service to a senior colleague or other appropriate authority.

3 Go the extra mile in customer service
3a. take action to go the extra mile in customer service
3b. ensure that your customer is aware of the added value of your actions
3c. monitor the effects of your added value actions to ensure that the service given to your other customers are unaffected
3d. note and pass on positive feedback from your customer about your actions
3e. monitor feedback about customer reactions to actions taken to go the extra mile.

Unit 557 Go the extra mile in customer service (A9)

Knowledge and understanding

To be competent at going the extra mile in customer service you must know and understand:

a. your organisation's **service offer**
b. how customers form expectations of the service they will receive
c. what types of service action most customers will see as adding value to customer service
d. your organisation's rules and procedures that determine your authority to go the extra mile
e. relevant legislation and regulation that impact on your freedom to go the extra mile
f. how your organisation receives customer service feedback on the types of customer experience that has impressed them
g. your organisation's procedures for making changes in its service offer
h. how to monitor feedback from customers and colleagues about actions taken to go the extra mile
i. how to recognise when particular extra mile actions become routine and might be suitably accommodated within the service offer.

Assessment guidance
Needs
- based on necessity

Identify needs and expectations
- questioning eg open and probing to identify needs and expectations and closed questions to confirm understanding
- observe non- verbal cues eg body language

The service offer
- what the organisation says it will deliver
- defines the extent and the limits of service eg refund policy

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- customer records*
- service offer*
- job description/limits of authority*
- organisational documentation*
- product/service information*
- legislative requirements and organisational ethical policies**

Note: this unit is about going the extra mile in customer service. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 558   Make telephone calls to customers (A12)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves very specific actions and should not be seen as a casual activity. By making a call to a customer you have the opportunity to prepare and you are therefore more likely to be able to lead the conversation in the direction you want it to go. This unit is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

Unit 558   Make telephone calls to customers (A12)

Outcomes of effective performance

When you make telephone calls to customers you must consistently:

1 Plan your calls effectively

1a.   use all appropriate customer **information** to plan your call

1b.   anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer

1c.   identify the objective of your call and the way in which you want the call to end

1d.   plan the opening part of your conversation with your customer and anticipate their **possible responses.**

2 Use telecommunication systems effectively

2a.   operate telecommunication equipment efficiently and effectively

2b.   speak clearly and slowly and adapt your speech to meet the individual needs of your customer

2c.   listen carefully when collecting information from your customer

2d.   select the information you need to record and store following your organisation's guidelines

2e.   update customer records during or after the call to reflect the key points of the conversation.

3 Make focussed calls to your customer

3a.   open the conversation positively and establish a rapport with your customer

3b.   confirm the identity of your customer following organisational guidelines

3c.   ensure that your customer is aware of the purpose of your call as early as possible

3d.   respond positively to queries and objections from your customer

3e.   summarise the outcome of the call and any actions that you or your customer will take as a result

3f.   complete any **follow up actions** agreed during the call.

Unit 558   Make telephone calls to customers (A12)

Knowledge and understanding

To be competent at making telephone calls to customers you must know and understand:

a.   relevant parts of **legislation, external regulations** and your organisation's procedures relating to the use of customer information to plan calls

b.   how to make use of information, including information through social media, about your customer when making a call

c.   your organisation's guidelines and procedures for the use of telecommunications system

d.   how to operate your organisation's telecommunications system

e.   the importance of speaking clearly and slowly when dealing with customers by telephone

f.   the effects of **smiling and other facial expressions** that can be detected by somebody listening to you on the telephone

g.   the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand

h.   what information it is important to note during or after telephone conversations with customers

i.   your organisation's guidelines and procedures for what should be said and not said during telephone conversations with customers

j.   your organisation's guidelines and procedures for taking action to follow up calls made to customers.

Assessment guidance

Information:
- call list
- customer records
- data needed for call eg promotion details, information on products/services being sold, follow up call

Plan the opening:
- introduction
- reason for call
- call content
- close call by summarising, checking details and completing administration

Possible responses:
eg objection handling
- listen
- empathise
- check understanding of objection
- offer solutions
- remain patient
- close and confirm

Legislation and regulation to include:
- Data Protection Act
- Communications Act
- Telephone Preference Service.

Post call follow up actions: eg
- complete administration
- update records
- pass information on to others

Body language and facial expressions used when dealing with customers can show:
- confidence or lack of it
- anger or aggression
- nervousness
- abruptness
- boredom
- interest or disinterest
- empathy
- compassion

Evidence may be supplied by:
- observation
- witness testimony
- professional discussion

- questioning
- reflective account
- customer records*
- service offer*
- call plans*
- organisational documentation, policies and procedures*
- manuals*
- legislative requirements and organisational ethical policies**

Note: This unit is about dealing with making telephone calls to customers and not incoming which is covered in unit 210. Here the candidate will require to be observed dealing with outgoing calls. Witness testimonies can be used to ensure the evidence is over time.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 559   Deal with customers using a social media platform (A19)

Level: 5
Credit value: 3

This Unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations interact with their customers through a variety of social media platforms. The evolution of Internet-based communication channels has led to customers choosing that medium for a wide range of communication with organisations providing services or products. Customers form expectations through the way the organisation presents itself in web-based communications and by the way it responds to customers and potential customers. Expectations are also affected by the conventions and functions of a particular platform and by other customers and network contacts who act as influencers. The reputation of your organisation can be directly affected by social media interactions and in particular the way you deal with negative reactions and problems which find their way into a public arena. This Standard is about being prepared to deal effectively with customer contact through social media platforms and using social media to satisfy customers by meeting their expectations. Do not choose this Standard if your organisation does not expect you to make routine and regular use of social media for customer service.

Unit 559   Deal with customers using a social media platform (A19)

Outcomes of effective performance

When you deal with customers using a social media platform you must consistently:

1.   Use a social media platform effectively

1a.   scan social media exchanges to identify relevant **customer communications**

1b.   respond to direct queries or requests through social media communications following organisational guidelines

1c.   explain your services or products and your organisation's service offer clearly and concisely to your customer

1d.   adapt your response using social media to your customer's precise needs

1e.   anticipate your customer's requests and needs for information

1f.   respond to social media communications and requests within organisational response time guidelines

2.   Establish a rapport with customers using social media

2a.   present a professional and respectful image when dealing with your customer

2b.   ensure that you interpret your customer's feelings from the tone and approach of their postings

2c.   respond to your customer in a way that shows you understand their feelings

2d.   follow the **conventions** of the chosen **social media platform** when responding to customers

3.   Deal effectively with customer questions and requests

3a.   search social media sources to identify customer questions and requests

3b.   use direct and effective questions to clarify your customer's requests

3c.   give clear and concise information in response to questions and requests

3d.   check the **security settings** of the social media platform if you make a private response to a customer

3e.   ensure that no further response is expected by your customer when dealing with a **closing contact**

3f.   take customer service opportunities to impress any other members of a social media community who see how you dealt with your customer

Unit 559 Deal with customers using a social media platform (A19)

Knowledge and understanding

To be competent at delivering reliable customer service you must know and understand:

a.   your organisation's guidelines for dealing with customers through social media
b.   ways to communicate customer service information to social media communities
c.   how to search social media sources for postings by customers
d.   how to anticipate your customer's requests and needs
e.   the importance of interpreting your customer's feelings and perceptions from postings on social media networks
f.   the **conventions** of **social media platforms** your customers choose to use
g.   the importance of sending clear and concise messages when using social media platforms
h.   how to control access to exchanges with customers using social media security settings
i.   what details to share with a colleague if more than one of you become involved in exchanges with a customer using social media
j.   how to recognise what should be the closing step in a series of social media exchanges with a customer

Assessment guidance

Customer communications: Are customer posts ie what the customer has written and placed on a social media platform

Conventions:
Convention is the etiquette of communication ie how you behave when you communicate on social media. You need to for example to:
- think before you post anything or respond
- use common sense
- be polite
- remember your posting is likely to be seen by many
- consider the language you use and your tone
- remember it is not your profile but your organisation's

Social media platforms: There are many social media platforms which are used by organisations to promote their products and services and communicate with customers. These are regularly being added to or changing in amount of usage. You will be required to explain how **three** of them can be used for customer service and use **at least one.**

Security settings: eg two-step verification helps to protect your account by making it more difficult for a hacker.

Closing contact: Is when you finish the communication. Before that you will check the customer is satisfied, you will confirm understanding and only then close the communication**.**

Evidence may be supplied by
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- customer feedback
- service offer*
- feedback
- documentation*
- organisational policies and procedures*

Note: this unit is about using social media to deliver customer service. Here the candidate will require to be observed over time actively using at least one form of social media to deliver customer service. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 560   Use questioning techniques when delivering customer service (B6)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This unit is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

Unit 560   Use questioning techniques when delivering customer service (B6)

Outcomes of effective performance

When you use questioning techniques when delivering customer service you must consistently:

1   Establish rapport and identify customer concerns

1a.   greet your customer sincerely and invite a full and open response

1b.   use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry

1c.   invite more detailed explanation from your customer

1d.   listen closely to your customer's responses to strengthen your understanding of their concerns

1e.   use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation

1f.   identify and note your customer's feelings and mood in relation to the information you are seeking.

2   Seek detailed information from customers using questioning techniques

2a.   follow a planned trail of questions to explore in detail customer concerns you have already identified

2b.   hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified

2c.   explain to your customer why you need the information you are asking for

2d.   use probing and searching questions that draw on comments or words used by your customer

2e.   thank your customer for the information in a way that encourages further open responses

2f.   follow organisational procedures to record your customer responses to inform future actions.

Unit 560 Use questioning techniques when delivering customer service (B6)

Knowledge and understanding

To be competent at using questioning techniques when delivering customer service you must know and understand:

a. why establishing rapport makes it easier to draw information from customers

b. ways to greet customers that immediately build rapport

c. reasons for using planned question patterns to draw out particular information

d. reasons for using spontaneous conversation to draw out particular information

e. the importance of active listening when seeking detailed information from customers

f. the differences between, and uses of, closed and open questions

g. the importance of explaining to customers why information is needed

h. why particular trigger questions are effective in gaining specific information

i. how to question and respond effectively using a chosen channel of communication or social media platform.

Assessment guidance

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- customer feedback*
- organisational documentation*
- legislative requirements and organisational policies and procedures*

Note: this unit is about the candidate using questioning techniques when delivering customer service. This requires the candidate to be observed dealing with a variety of customers over time. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 561   Deal with customers using bespoke software (B7)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
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, you must be able to navigate the system quickly by directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system you are using and they must be kept informed of the different steps you are taking. Your use of the system must also ensure that you keep 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 you if you are responsible for delivering service to customers at the same time as operating bespoke service software. Do not use this unit if you do not make regular use of a bespoke software system when dealing with customers.

Unit 561 Deal with customers using bespoke software (B7)

Outcomes of effective performance

When you deal with customers using bespoke software you must consistently:

1 Prepare to deliver customer service using bespoke software

1a. sign on and open access to appropriate functions in the IT system

1b. navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas

1c. explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver

1d. ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed

1e. prepare your work area to deliver customer service using bespoke software.

2 Deliver customer service using bespoke software

2a. identify your customer or the services or products they wish to access

2b. follow organisational procedures to step through the system in a way that responds to your customer's needs

2c. use search or other specialist functions within the software to respond to customer requests

2d. enter new records using the bespoke software system

2e. amend customer service records in the bespoke software system

2f. communicate with your customers in terms they can understand relating to the software system

2g. follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software

2h. interpret error messages and act on them to support your customer service

2i. refer your customer to a colleague following organisational procedures if you are unable to complete the transaction.

Unit 561   Deal with customers using bespoke software (B7)

Knowledge and understanding

To be competent at dealing with customers using bespoke software you must know and understand:

a. access and sign-on routines for the bespoke software system

b. the architecture and geography of the bespoke software system

c. different screen or menu routes that can be followed to meet customer requirements

d. sources of support and help for the bespoke software including manuals, help screens and help lines

e. the importance of preparing a work area before delivering customer service

f. search or other enquiry facilities within the bespoke software system

g. the importance of avoiding jargon and system terminology when communicating with customers

h. ways to respond to error messages when using a bespoke software system

i. referral points and sources of information when you are unable to meet customer needs using the bespoke software system

j. links between the bespoke software system and open networks or social media platforms that may be appropriate for communication with your customers.

Assessment guidance

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- manuals*
- organisational documentation*
- legislative requirements and organisational policies and procedures*

Note: this unit is about dealing with customers using bespoke software. This requires the candidate to be observed dealing with a variety of customers over time and when doing so make use of the software, recording the contact. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 562   Maintain customer service through effective handover (B8)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Unit 562   Maintain customer service through effective handover (B8)

Outcomes of effective performance

When you maintain customer service through effective handover you must consistently:

1   **Agree joint responsibilities in a customer service team**

1a.   identify services or products you are involved in delivering that rely on effective teamwork

1b.   identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues

1c.   agree with colleagues when it is right to pass responsibility for completing a customer service action to another

1d.   agree with colleagues how information should be exchanged between you to enable another to complete a customer service action

1e.   identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action.

2   **Check that customer service actions are seen through by working together with colleagues**

2a.   access reminders to identify when to check that a customer service action has been completed

2b.   ensure that you are aware of all details of customer service actions your colleague was due to complete

2c.   ask your colleague about the outcome of their completing the customer service action as agreed

2d.   identify the next customer service actions if your colleagues have been unable to complete the actions you had previously agreed

2e.   work with colleagues to review the way in which customer service actions are shared.

Unit 562   Maintain customer service through effective handover (B8)

Knowledge and understanding

To be competent at maintaining customer service through effective handover you must know and understand:

a. your organisation's customer service procedures for the services or products you are involved in delivering

b. the appropriate colleagues to pass responsibility to for completing particular customer service actions

c. ways of ensuring that information is passed between you and your colleagues effectively

d. organisational procedures and acceptable communication media and platforms for passing information to colleagues

e. ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague

f. the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting

g. opportunities for contributing to review the way customer service actions are shared in customer service processes.

Assessment guidance

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- job description, organisation chart and limits of authority*
- organisational documentation*
- legislative requirements and organisational policies and procedures*

Note: this unit is about maintaining customer service through effective handover of information and/or customer. This requires the candidate to have shared responsibility and be observed dealing with a variety of customers over time ensuring effective handovers occur. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 563 Deliver customer service in an environmentally friendly and sustainable way (B17)

Level: 5
Credit value: 3

This unit is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
Environmental awareness and positive action on sustainability form an important part of the culture and strategy in many organisations. Those organisations have devised policies to ensure that they gain the approval of customers and other stakeholders by promoting a sustainable approach to their services or products. An ethical approach to the environment can enhance the organisation's reputation. This approach is achieved only if those delivering the service follow guidelines and procedures in order to display personal and organisational commitment to the environment and sustainability. This unit addresses the balances that must be found when delivering customer service while meeting environmental standards. The unit is appropriate for you if your organisation has a clear commitment to sustainability and if aspects of your job role make a direct contribution to that.

Unit 563   Deliver customer service in an environmentally friendly and sustainable way (B17)

Outcomes of effective performance

When you deliver customer service in an environmentally friendly and sustainable way you must consistently:

1. **Follow organisational policies and procedures to deliver customer service in an environmental and sustainable way**
1a. encourage customers to contribute to your organisation's environmental policies
1b. keep customers informed about your organisation's environmentally friendly and sustainable policies
1c. contribute to activities and actions to improve your organisation's environmentally friendly approach
1d. follow your organisation's procedures to promote environmentally friendly and sustainable approaches when dealing with service partners
1e. keep service partners informed about your organisation's environmentally friendly and sustainable policies.

2. **Contribute to the development of environmentally friendly and sustainable customer service procedures**
2a. identify opportunities for energy and carbon emission savings when following organisational customer service procedures
2b. identify opportunities for waste management improvements when following organisational customer service procedures
2c. follow organisational procedures to inform those with appropriate authority of opportunities to improve environmental aspects of customer service
2d. work with colleagues to implement environmental improvements in customer service
2e. communicate with customers about environmental improvements in customer service.

Unit 563   Deliver customer service in an environmentally friendly and sustainable way (B17)

Knowledge and understanding

To be competent at delivering customer service in an environmentally friendly and sustainable way you must know and understand:

a.   principles of environmental practices and on-going sustainability that are
b.   relevant to customer service operations
c.   organisational policies that link environmental issues with customer
d.   service
e.   principles of energy saving and reducing carbon emissions
f.   principles of waste management relevant to your organisation
g.   the environmental issues and risks represented by your organisation's services or products
h.   your organisation's procedures for energy, carbon emission and waste
i.   management
j.   how to keep customers informed about your organisation's environmental policies and procedures
k.   how to work with service partners to promote environmental and sustainable benefits
l.   organisational procedures for passing on ideas for environmental improvements
m.   the importance of having appropriate authority for implementing changes in customer service procedures
n.   the importance of recognising that environmental actions involve cost for your organisation

Assessment guidance

Evidence may be supplied by:
- witness testimony
- observation
- questioning
- professional discussion
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: this unit is about delivering customer service in an environmentally friendly and sustainable way. Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently deliver customer service in an environmentally friendly and sustainable way.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 564   Resolve customer service problems (C3)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
This unit is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your 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 your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you 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 your organisation is by the way problems are handled.

Unit 564   Resolve customer service problems (C3)

Outcomes of effective performance

When you resolve customer service problems you must consistently:

1   Spot customer service problems

1a.   listen carefully to your customers about any problem they have raised

1b.   ask your customers about the problem to check your understanding

1c.   recognise repeated problems and alert the appropriate authority

1d.   share customer feedback with others to identify potential problems before they happen

1e.   identify problems with systems and procedures before they begin to affect your customers.

2   Pick the best solution to resolve customer service problems

2a.   identify the options for resolving a customer service problem

2b.   choose the most effective **method of communication** for dealing with your customer when resolving a customer service problem

2c.   work with others to identify and confirm the **options** to resolve a customer service problem

2d.   work out the advantages and disadvantages of each option for your customer and your organisation

2e.   pick the best option for your customer and your organisation

2f.   identify for your customer other ways that problems may be resolved if you are unable to help.

3   Take action to resolve customer service problems

3a.   discuss and agree the options for solving the problem with your customer

3b.   take action to implement the option agreed with your customer

3c.   work with others and your customer to make sure that any promises related to solving the problem are kept

3d.   keep your customer fully informed about what is happening to resolve the problem

3e.   check with your customer to make sure the problem has been resolved to their satisfaction

3f.   give clear reasons to your customer when the problem has not been resolved to their satisfaction.

Unit 564 Resolve customer service problems (C3)

Knowledge and understanding

To be competent at resolving customer service problems you must know and understand:

a. organisational procedures and systems for dealing with customer service problems
b. how to defuse potentially stressful situations
c. how to negotiate
d. the limitations of what you can offer your customer
e. types of action that may make a customer problem worse and should be avoided
f. how to choose the most effective method of communication when dealing with customer service problems
g. how to make best use of remote communications with customers through social media when resolving customer problems.

Assessment guidance

Method of communication
- remain calm
- listen
- talk clearly and confidently
- remain in control
- let them speak without interruption when they are angry
- ask questions and speak slowly and with concern in tone when they are confused
- alter communication to suit the customer
- ask for assistance from others where necessary
- if an angry customer, try to move them from other customers but do not allow yourself to be alone with them and out of sight of colleagues

Options

Workable options: are options that balance the needs of the customer and the organisation.

Option for resolution: is the process carried out to solve the customer service problem which may require some form of negotiation and compromise.

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- manuals*
- organisational documentation*

- legislative requirements and organisational policies and procedures*

Note: this unit is about resolving customer service problems. This requires the candidate to be observed dealing with a variety of customers over time and taking responsibility for working on resolving problems. Witness testimonies can be added if necessary.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 565   Deliver customer service to challenging customers (C4)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Many organisations have a significant proportion of customers who are challenging to deal with. Your customer's attitude may be challenging simply because they believe that a threat or problem exists before they contact your organisation. They may become worried or angry when they discover that their expectations are not going to be met by your organisation. They may be very concerned or nervous about the outcome of dealing with your organisation. In either case, they are challenging to deal with and need your 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. You should choose this unit only if you recognise the content as applying to a reasonable proportion of your exchanges with customers. Do not choose this unit if it will be hard to find evidence because you only occasionally deal with a difficult customer.

Unit 565   Deliver customer service to challenging customers (C4)

Outcomes of effective performance

When you deliver customer service to challenging customers you must consistently:

1   Recognise when customers may be challenging to deal with

1a.   recognise types of **customer behaviour** that are challenging to deal with

1b.   identify aspects of your organisation's services or products that make it challenging to deal with customers

1c.   identify the signs and signals that indicate a customer may be challenging to deal with

1d.   put yourself in your customer's position and see the situation from their point of view

1e.   identify reasons why your customers may be behaving in a way that is difficult to deal with

1f.   recognise the limits of challenging customer behaviour that your organisation will tolerate

1g.   identify things that you may do or say that will provoke challenging responses from your customer.

2   Deal with customers who are challenging

2a.   listen patiently to what your customer wants to tell you

2b.   use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them

2c.   check your understanding of your customer's concerns by describing your view of the situation and options that might be available

2d.   express empathy with your customer without necessarily admitting fault on the part of your organisation

2e.   give clear statements or explanations of your organisation's position

2f.   agree a way forward that balances customer satisfaction with the needs of your organisation

2g.   **enlist help** from colleagues if options for action are outside of your authority

2h.   summarise clearly actions to be taken and reasons for those actions to complete the customer transaction

2i.   advise your manager or the appropriate colleagues if your customer is likely to **re-open** the matter with them

2j.   take any necessary action to protect your own safety or that of other customers or colleagues from a customer who is challenging or difficult.

Unit 565 Deliver customer service to challenging customers (C4)

Knowledge and understanding

To be competent at delivering customer service to challenging customers you must know and understand:

a.   the types of customer behaviour that you personally find challenging to deal with

b.   reasons why some aspect of your organisation's services or products may provoke challenging behaviour from customers

c.   reasons why your customer's own actions may cause them to behave in a way that is challenging to deal with

d.   the meaning of having empathy for a customer's feelings

e.   who can be asked for help when dealing with a challenging customer

f.   the difference between assertive, aggressive and passive behaviour

g.   the importance of not simply quoting your organisation's rules and procedures to counter your customer's challenging behaviour

h.   your organisation's limits of what will be tolerated from challenging customers before the transaction or relationship is closed

i.   the importance of giving your manager or the appropriate colleagues notice of any further approaches from a challenging customer

j.   when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a challenging customer.

Assessment guidance

Challenging customers: eg
- angry
- abusive
- confused
- having special requirements
- unreasonable attitude
- unwilling to listen
- lack of understanding
- frustration
- assertive where the customer is confident and self-assured but not aggressive
- aggressive where the customer is very unpleasant and most likely threatening or even abusive or violent. It is likely the organisation will have a policy on how such people should be handled

Organisation's limits can be shown in
- service offer
- customer service policy
- policy on abusive behaviour

- Standards of behaviour will relate to the standards of behaviour of both the staff and customer. The organisation could have a:
- point at which the challenging customer should be referred to others
- set procedure for the way in which staff handle such customers and the support that can be offered in their handling

Re-open or enlisting help:
- re-open means when customers reappear or make contact asking for the same problem or complaint to be looked at again.
- enlisting help means either asking for management to be involved or contacting management direct.

Evidence may be supplied by:
- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- documentation*
- legal and ethical requirements and organisational policies and procedures*

Note: this unit is about delivering customer service to challenging customers. It is not about delivering customer service in normal situations. The candidate will require to be observed dealing with at least **three** challenging customers. Witness testimonies can be added if necessary to cover the three situations.

 * While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 566   Develop customer relationships (D1)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?
When you deal with your customer regularly, you want to make each occasion a good customer experience. The impression you create and the way the service is delivered affects this in just the same way as when you deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up your customer's confidence in the service you offer. Loyalty and a long-term relationship rely on your customer having a realistic view of your organisation's service and being comfortable with it. Your customer will return to your organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with you before.

Unit 566 Develop customer relationships (D1)

Outcomes of effective performance
When you develop customer relationships you must consistently:

1 Build your customer's confidence that the service you give will be excellent
1a. show that you know and understand your organisation's services or products
1b. allocate the time you take to deal with your customer following organisational guidelines
1c. reassure your customer that you are doing everything possible to keep the service promises made by your organisation.

2 Meet the expectations of your customers
2a. recognise when there may be a conflict between your customer's expectations and your organisation's service offer
2b. balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
2c. work effectively with others to resolve any difficulties in meeting your customer's expectations.

3 Develop the long-term relationship between your customer and your organisation
3a. give additional help and information to your customer in response to their questions and comments about your organisation's services or products
3b. discuss expectations with your customer and explain how these compare with your organisation's services or products
3c. advise others of feedback received from your customer
3d. identify new ways of helping your customers based on the feedback they have given you
3e. identify added value that your organisation could offer to long-term customers.

Unit 566   Develop customer relationships (D1)

Knowledge and understanding

To be competent at developing customer relationships you must know and understand:

a. the importance of customer retention
b. how your own behaviour affects the behaviour of the customer
c. how to behave assertively and professionally at all times
d. how to defuse potentially stressful situations
e. the limitations of your organisation's service offer
f. how customer expectations may change as they deal with your organisation
g. the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
h. the cost implications of bringing in new customers as opposed to retaining existing customers
i. who to refer to when considering any variation to your organisation's service offer
j. the opportunities offered by different channels of communication such as social media for developing customer relationships.

Assessment guidance

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: This unit is about developing customer relationships. Here the candidate will require to be observed developing customer relationships with a variety of customers. Where observation is not possible in all cases, witness testimonies can be used.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 567 Develop your own customer service skills through individual learning (D6)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Much of the responsibility for developing customer service knowledge and skills rests on you as an individual. There are numerous sources of information that can be used but which need to be located and linked with your 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 you learn in the course of your work. It is the right unit for you if you need to take responsibility for your own self-development in relation to customer service skills.

Unit 567   Develop your own customer service skills through individual learning (D6)

Outcomes of effective performance

When you develop your own customer service skills through individual learning you must consistently:

1   Find ways to learn more about customer service and your job

1a.   identify different sources of information and support that will help you to develop your customer service knowledge and skills

1b.   agree with your line manager, your mentor or others doing a similar job, the best sources to use for self-development of your customer service knowledge and skills

1c.   take action to remind yourself to regularly access sources of information and support

1d.   search for additional sources of information to support your customer service learning

1e.   store materials that support self-study for future use

1f.   plan time to study the self-study materials you have collected

1g.   draw up a list of actions that together form a self-development plan.

2   Use sources of self-development to extend your customer service skills and knowledge

2a.   access organisational update information to extend your knowledge of products and services

2b.   access organisational information to learn more about the way your role contributes to customer service

2c.   monitor publications to identify ideas and new developments in customer service which you could apply in your work

2d.   study collected information to develop your own customer service knowledge and skills

2e.   take action resulting from your learning to change the way you deal with customers

2f.   share your plans for action with your line manager, your mentor or others doing a similar job, to seek their ideas for further options

2g.   record actions you take to learn more about customer service and identify those which have the most positive effects.

Unit 567　Develop your own customer service skills through individual learning (D6)

Knowledge and understanding

To be competent at developing your own customer service skills through individual learning you must know and understand:

a.　ways to locate information updating you on services and products in your organisation

b.　sources of information about customer service knowledge and skills that will help you to develop

c.　ways to store information that you use to develop your customer service skills

d.　the importance of focus when self-studying to improve your customer service knowledge and skills

e.　ways to convert information or ideas you have found through self-study into practical customer service actions

f.　the value of discussing your learning with line manager, your mentor or others doing a similar job

g.　methods of recording actions to improve your customer service skills which have had positive effects.

Assessment guidance

Evidence may be supplied by:
- witness testimony
- observation
- questioning
- professional discussion
- sources of information
- record of learning/development
- record of discussion with line manager, mentor or other
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: Here candidates are required to develop their own customer service skills through individual learning and will require to carry out research and show some initiative in the work undertaken.

Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently develop their own customer service skills through individual learning.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 610 Monitor and solve customer service problems (C5)

Level: 6

Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Unit 610 Monitor and solve customer service problems (C5)

Outcomes of effective performance

When you monitor and solve customer service problems you must consistently:

1 Solve immediate customer service problems

1a. respond positively to customer service problems following **organisational guidelines**

1b. solve customer service **problems** when you have sufficient authority

1c. work with others to solve customer service problems

1d. keep customers informed of the actions being taken

1e. check with customers that they are comfortable with the actions being taken

1f. solve problems with service systems and procedures that might affect customers before they become aware of them

1g. inform managers and colleagues of the steps taken to solve specific problems.

2 Identify repeated customer service problems and options for solving them

2a. identify repeated customer service problems

2b. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option

2c. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation.

3 Take action to avoid the repetition of customer service problems

3a. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated

3b. action your agreed solution

3c. keep your customers informed, in a positive and clear manner, of steps being taken to solve any service problems

3d. monitor the changes you have made and adjust them if appropriate.

Unit 610 Monitor and solve customer service problems (C5)

Knowledge and understanding

To be competent at monitoring and solving customer service problems you must know and understand:

a. organisational procedures and systems for dealing with customer service problems

b. organisational procedures and systems for identifying repeated customer service problems

c. how the successful resolution of customer service problems contributes to customer loyalty with the external customer, and improved working relationships with service partners or internal customers

d. how to negotiate with and reassure customers while their problems are being solved

e. the opportunities and potential for monitoring and solving customer service problems presented by remote information collection and sharing such as through social media.

Assessment Guidance

Problems: Candidates must show evidence of having dealt with a number of customers and a number of problems over time.

Organisational guidelines which relate to:
- roles and responsibilities showing limits of authority
- service offer
- handling of customer issues.

- **Evidence may be supplied by**:
- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: This unit is about resolving customer problems and not about resolving complaints which is covered in unit 312. Here the candidate will require to be observed resolving customer problems. Where problems have arisen and the assessor has not been available, witness testimonies can be used.

Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently monitor and solve customer service problems.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Unit 710 Process customer service complaints (C7)

Level: 7
Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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 your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. Your organisation may have detailed and formal procedures for dealing with complaints.

Unit 710   Process customer service complaints (C7)

Outcomes of effective performance
When you process customer service complaints you must consistently:

1   Recognise the signs that a query or problem is about to produce a complaint

1a.   identify signs that a customer is becoming dissatisfied with the customer service of your organisation

1b.   take action to change the situation so that the query or problem does not result in a complaint

1c.   take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made.

2   Deal with a complaint effectively

2a.   ensure that you have a clear understanding of the nature and details of the complaint

2b.   investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint

2c.   identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation

2d.   assess the risks to your organisation of choosing each option

2e.   report the findings of your investigation to your customer and offer your chosen solution

2f.   escalate the complaint by involving more senior members of your organisation, or an independent third party, if there is sufficient reason to do so

2g.   give feedback to other colleagues involved, which will help them avoid future complaints

2h.   keep clear records of the way the complaint has been handled to avoid later misunderstandings.

Unit 710 Process customer service complaints (C7)

Knowledge and understanding

To be competent at processing customer service complaints you must know and understand:

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

b. why dealing with complaints is an inevitable part of delivering customer service

c. organisational procedures for dealing with complaints

d. how to negotiate a solution with your customer that is acceptable to that customer and to the organisation

e. the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported

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

g. the cost and regulatory implications of admitting liability for an error made by your organisation

h. how to spot and interpret signals that your customer may be considering making a complaint

i. techniques for handling conflict

j. the importance of dealing with a complaint promptly

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

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

m. the most effective forms of response when complaints are submitted through different channels such as social media.

Assessment guidance

Evidence may be supplied by:
- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: This unit is about resolving complaints, not customer problems which are covered in unit 310. Here candidates are required to recognise when a problem becomes a complaint and deal with it accordingly. Here the candidate will require to be observed resolving customer complaints. Where complaints have arisen and the assessor has not been available, witness testimonies and other forms of evidence can be used.

Here the candidate **may prefer to produce a report** that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they can competently process customer service complaints.

*Internal/organisational documentation etc need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

Appendix 1   Core Skills Signposting for SVQs in Customer Service

	SVQ in Customer Service at SCQF Level 5	C	N	PS	WWO	ICT
F1	Communicate in a customer service environment	4	-	-	4	4
F2	Deliver customer service within the rules	5	-	-	5	5
A3	Communicate effectively with customers	5	-	5	5	5
A4	Give customers a positive impression of yourself and your organisation	5	-	5	5	5
A5	Promote additional services or products to customers	5	5	-	5	5
A6	Process information about customers	5	5	5	5	5
A7	Live up to the brand promise when delivering customer service	5	5	-	5	5
A8	Make customer service personal	5	5	-	5	5
A9	Go the extra mile in customer service	5	5	-	5	5
A10	Deal with customers face to face	5	5	-	5	5
A11	Deal with incoming telephone calls from customers	5	-	5	5	5
A12	Make telephone calls to customers	5	-	5	5	5
A19	Deal with customers using a social media platform	5	5	5	5	5
B2	Deliver reliable customer service	5	5	5	5	5
B3	Deliver customer service on your customer's premises	5	5	5	5	5
B4	Recognise diversity when delivering customer service	5	-	-	5	5
B5	Deal with customers across a language divide	5	-	5	5	5
B6	Use questioning techniques when delivering customer service	5	5	5	5	5
B7	Deal with customers using bespoke software	5	5	5	5	5
B8	Maintain customer service through effective handover	5	-	5	5	5
B17	Deliver customer service in an environmentally friendly and sustainable way	5	5	5	5	5
C3	Resolve customer service problems	5	-	5	5	5
C4	Deliver customer service to challenging customers	5	-	5	5	5
C5	Monitor and solve customer service problems	6	-	6	6	6
C6	Apply risk assessment to customer service	6	6	6	6	6
C7	Process customer service complaints	6	-	6	6	6
D1	Develop customer relationships	5	-	5	5	5
D2	Support customer service improvements	5	-	-	5	5
D3	Develop personal performance through delivering customer service	5	5	5	5	5
D4	Support customers using on-line customer services	5	5	5	5	5
D5	Buddy a colleague to develop their customer service skills	5	-	5	5	5
D6	Develop your own customer service skills through individual learning	5	-	5	5	5
D7	Support customers using self service technology	5	-	5	5	5

C=Communication; N= Numeracy; PS=Problem Solving; WWO= Working with Others;
ICT=Information and Communication Technology

Appendix 2   Sources of general information

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

Providing City & Guilds qualifications – a guide to centre and qualification approval
contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

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

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

- ***Walled Garden***
  Find out how to register and certificate candidates on line
- ***Events***
  Contains dates and information on the latest Centre events
- ***Online assessment***
  Contains information on how to register for E-volve assessments.

Useful contacts

UK learners **General qualification information**	**E: learnersupport@cityandguilds.com**
International learners General qualification information	TF: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results	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	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	F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, GOLA, Navigation, User/menu option, Problems	F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business_unit@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	F: +44 (0)20 7294 2413

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