

# SVQ in Customer Service at SCQF Level 6 (4427-30)

Qualification handbook for centres



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September 2016  
Version 1.2 (January 2019)

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# 1 Introduction

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

<b>Qualification title and level</b>	<b>SVQ in Customer Service at SCQF Level 6</b>
<b>City &amp; Guilds qualification number</b>	4427-30
<b>Qualification accreditation number</b>	GL7T 46
<b>Last registration date</b>	See Online Catalogue/Walled Garden for last dates
<b>Last certification date</b>	See Online Catalogue/Walled Garden for last dates

The SVQ in Customer Service at SCQF Level 6 qualification aims to provide opportunities to demonstrate understanding of customer service as a competitive tool and to be proactive in finding solutions both within and externally to their organisation. Candidates are likely to have significant responsibility for the delivery of both internal and external customer service within their team or organisation. Candidates will demonstrate their ability to analyse and respond to customers on a strategic level, suggesting improvements and leading in their implementation, using software solutions as appropriate.

## Contacting Skills CFA

Tel: 020 7091 9620

Website: [www.skillscfa.org](http://www.skillscfa.org)

## The Institute of Customer Service (ICS)

Tel: 020 7260 2620

Website: [www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com)

Version and date	Change detail	Section
1.1 Oct 2016	Updated credit values Unit 710 and 723	<b>Unit</b>
1.2 January 2019	Removed rule on number of units to achieve at level 6, no longer relevant	<b>1</b>

## 1.1 Qualification structure

To achieve the **SVQ in Customer Service at SCQF Level 6**, 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 Units**

**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**

A maximum of **two** Optional Units can be selected from the Optional Units at **SCQF level 7 and/or 8**

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.

<b>City &amp; Guilds unit number</b>	<b>Group A Mandatory Units – Customer Service Foundations</b>	<b>SCQF Level</b>	<b>SCQF Credit</b>
4427-720	Show understanding of customer service (F3)	7	6
4427-620	Show understanding of the rules that impact on improvements in customer service (F4)	6	6
<b>City &amp; Guilds unit number</b>	<b>Group B Optional Units – Impression and Image</b>	<b>SCQF Level</b>	<b>SCQF Credit</b>
4427-621	Deal with customers in writing or electronically (A13)	6	6
4427-721	Use customer service as a competitive tool (A14)	7	8
4427-622	Organise the promotion of additional services or products to customers (A15)	6	7
4427-722	Build a customer service knowledge base (A16)	7	7
<b>City &amp; Guilds unit number</b>	<b>Group C Optional Units – Delivery</b>	<b>SCQF Level</b>	<b>SCQF Credit</b>
4427-623	Deliver customer service using service partnerships (B9)	6	6
4427-308	Organise the delivery of reliable customer service (B10)	6	6
4427-624	Improve the customer relationship (B11)	6	7
4427-563	Deliver customer service in an environmentally friendly and suitable way (B17)	5	3
<b>City &amp; Guilds unit number</b>	<b>Group D Optional Units – Handling Problems</b>	<b>SCQF Level</b>	<b>SCQF Credit</b>
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
<b>City &amp; Guilds unit number</b>	<b>Group E Optional Units – Development and Improvement</b>	<b>SCQF Level</b>	<b>SCQF Credit</b>
4427-313	Work with others to improve customer service (D8)	6	8
4427-723	Promote continuous improvement (D9)	7	7
4427-315	Develop your own and others' customer service skills (D10)	6	8
4427-316	Lead a team to improve customer service (D11)	7	7
4427-724	Gather, analyse and interpret customer feedback (D12)	7	10
4427-318	Monitor the quality of customer service transactions (D13)	6	7
4427-411	Implement quality improvements to customer service (D14)	8	10
4427-412	Plan and organise the development of customer service staff (D15)	8	9
4427-800	Develop a customer service strategy for a part of an organisation (D16)	8	11
4427-801	Manage a customer service award programme (D17)	8	7
4427-802	Apply technology or other resources to improve customer	8	11



	service (D18)		
4427-416	Review and re-engineer customer service processes (D19)	8	11
4427-417	Manage customer service performance (D20)	7	7
4427-625	Analyse and Report on the Content of Customer Service Feedback Posted on Social Media (D21)	6	4
4427-725	Develop a Customer Service Network Through Social Media Platforms (D22)	7	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 8
- Customer Service Advanced 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:

<b>Description</b>	<b>How to access</b>
Generic candidate recording forms	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
Centre guide	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
Promotional materials	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
SmartScreen	<a href="http://www.smartscreen.co.uk">www.smartscreen.co.uk</a>

## 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 3 in Customer Service at SCQF Level 6 (4427-03) will be given automatic approval for the new SVQ in Customer Service at SCQF level 6 (4427-30). 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 quality assurer, but must never internally verify their own assessments.

### **Assessors, internal verifiers and external verifiers**

Centre staff should hold, or be working towards, the relevant Assessor/Verifier units for their role in delivering, assessing and verifying this qualification. They must be able to demonstrate that they meet the following occupational expertise requirements.

#### **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 IQA 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 EQA 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

<b>The Assessor, IQA and EQA working at SCQF Level 6 must have:</b>	<b>This can be evidenced by:</b>	<b>A</b>	<b>IQA</b>	<b>EQA</b>
A thorough understanding of the National Occupational Standards in Customer Service at SCQF Level 6 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 Customer Service S/SVQ at SCQF Level 6	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the SSQF Level 5, 6 or 8 Customer Service S/SVQ	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/SVQs at SCQF Level 6	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
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.	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	✓	✓	✓

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.				
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.

### **SCQF Levels 5 and 6 units**

#### **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.**

#### **Realistic Working Environment (RWE)**

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.

To undertake any 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

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

#### **Age restrictions**

This qualification is not approved for use by candidates under the age of 16 and City & Guilds cannot accept any registrations for candidates in this age group.

There are no other age limits attached to candidates undertaking this qualification unless it 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](http://www.smartscreen.co.uk)**
- Useful material is available from **[www.cfa.uk.com](http://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](http://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 308

# Organise the delivery of reliable customer service (B10)

**Level:** 6

**Credit value:** 6

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 organise the delivery and maintenance of excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

**Outcomes of effective performance**

When you organise the delivery of reliable customer service you must consistently:

**1 Plan and organise the delivery of reliable customer service**

- 1a. plan, prepare and organise everything you need to deliver services or products to different types of customers
- 1b. organise what you do to ensure that you are consistently able to give prompt attention to your customers
- 1c. reorganise your work to respond to unexpected additional workloads.

**2 Review and maintain customer service delivery**

- 2a. maintain service delivery during very busy periods and unusually quiet periods
- 2b. maintain service delivery when systems, people or resources have let you down
- 2c. consistently meet your customers' expectations
- 2d. balance the time you take with your customers with the demands of other customers seeking your attention
- 2e. respond appropriately to your customers when they make comments about the services or products you are offering
- 2f. alert others to repeated comments made by your customers
- 2g. take action to improve the reliability of your service based on customer comments
- 2h. monitor the action you have taken to identify improvements in the service you give to your customers.

**3 Use recording systems to maintain reliable customer service**

- 3a. record and store customer service information accurately following organisational guidelines
- 3b. select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- 3c. quickly locate information that will help solve a customer's query
- 3d. supply accurate customer service information to others using the most appropriate method of communication.

**Knowledge and understanding**

To be competent at organising the delivery of reliable customer service you must know and understand:

- a. organisational procedures for unexpected situations and your role within them
- b. resource implications in times of staff sickness and holiday periods and your responsibility at these times
- c. the importance of having reliable and fast information for your customers and your organisation
- d. organisational procedures and systems for delivering customer service
- e. how to identify useful customer feedback and how to decide which feedback should be acted on
- f. how to communicate feedback from customers to others
- g. organisational procedures and systems for recording, storing, retrieving and supplying customer service information.
- h. legal and regulatory requirements regarding the storage of data.

## Assessment Guidance

### Evidence may be supplied by:

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

**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 organise the delivery of reliable 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 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.

**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.



**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 313

## Work with others to improve customer service (D8)

**Level:** 6

**Credit value:** 8

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?**

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

**Outcomes of effective performance**

When you work with others to improve customer service you must consistently:

**1 Improve customer service by working with others**

- 1a. contribute constructive ideas for improving customer service
- 1b. identify what you have to do to improve customer service and confirm this with others
- 1c. agree with others what they have to do to improve customer service
- 1d. co-operate with others to improve customer service
- 1e. keep your commitments made to others
- 1f. make others aware of anything that may affect plans to improve customer service.

**2 Monitor your own performance when improving customer service**

- 2a. discuss with others how what you do affects customer service performance
- 2b. identify how the way you work with others contributes towards improving customer service.

**3 Monitor team performance when improving customer service**

- 3a. discuss with others how teamwork affects customer service performance
- 3b. work with others to collect information on team's customer service performance
- 3c. identify with others how customer service teamwork could be improved
- 3d. take action with others to improve customer service performance.

**Knowledge and understanding**

To be competent at working with others to improve customer service you must know and understand:

- a. who else is involved either directly or indirectly in the delivery of customer service
- b. the roles and responsibilities of others in your organisation
- c. the roles of others outside your organisation who have an impact on your services or products
- d. what the goals or targets of your organisation are in relation to customer service and how these are set
- e. how your organisation identifies improvements in customer service.

## Assessment guidance

### Evidence may be supplied by:

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

**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 can competently work with others to improve 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 315

## Develop your own and others' customer service skills (D10)

**Level:** 6

**Credit value:** 8

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?**

This unit is about taking responsibility for continuously developing your own customer service skills and passing those skills on to others. It is about helping yourself and others to learn and grow in your customer service roles. You may not be a manager or a supervisor but you may be responsible for showing others how things work and what they need to do. For example a new member of staff may need an introduction to the products, services, systems or procedures of your organisation and you may be asked to show them. Or you may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that you are asked to learn about and present or demonstrate to others. This unit will help you to put 'showing others' into a formal framework that will help them to learn and improve your own coaching skills. The delivery of excellent customer service depends on your skills and the skills of those around you.

**Outcomes of effective performance**

When you develop your own and others' customer service skills you must consistently:

**1 Develop your own customer service skills**

- 1a. agree with a manager or mentor the specific customer service skills you need in your customer service role
- 1b. agree the actions you need to take to improve your customer service skills
- 1c. draw up a personal development plan based on your agreed actions to improve your customer service skills
- 1d. carry out your personal development activities and review your progress
- 1e. obtain feedback from your manager or mentor about your customer service performance and update your personal development plan.

**2 Plan the coaching of others in customer service**

- 2a. identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
- 2b. identify opportunities for colleagues to take actions to develop their customer service skills
- 2c. plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills.

**3 Coach others in customer service**

- 3a. coach colleagues to develop specific and agreed customer service skills
- 3b. give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- 3c. regularly check the progress of colleagues and modify your coaching as appropriate
- 3d. give regular feedback to colleagues about the progress they are making
- 3e. explain clearly to colleagues how ongoing support will be provided.



**Knowledge and understanding**

To be competent at developing your own and others' customer service skills you must know and understand:

- a. organisational systems and procedures for developing your own and others' personal performance in customer service
- b. how your behaviour impacts on others
- c. how to review effectively your personal strengths and development needs
- d. how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
- e. how to obtain useful and constructive personal feedback from others
- f. how to respond positively to personal feedback
- g. how to put together a coaching plan that will build on the strengths of the learner and overcome their weaknesses in areas that are important to customer service and their job role
- h. how to give useful and constructive personal feedback to others
- i. how to help others to respond positively to personal feedback.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- personal development plan
- staff recruitment and training records
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 can competently develop their own and others' 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 316

## Lead a team to improve customer service (D11)

**Level:** 7

**Credit value:** 7

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?**

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance. This unit is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

**Outcomes of effective performance**

When you lead a team to improve customer service you must consistently:

**1 Plan and organise the work of a team**

- 1a. treat team members with respect at all times
- 1b. agree with team members their role in delivering effective customer service
- 1c. involve team members in planning and organising their customer service work
- 1d. allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- 1e. motivate team members to work together to raise their customer service performance.

**2 Provide support for team members**

- 2a. check that team members understand what they have to do to improve their work with customers and why that is important
- 2b. check with team members what support they feel they may need throughout this process
- 2c. provide team members with support and direction when they need help
- 2d. encourage team members to work together to improve customer service.

**3 Review performance of team members**

- 3a. provide sensitive feedback to team members about their customer service performance
- 3b. encourage team members to discuss their customer service performance
- 3c. discuss, sensitively, with team members action they need to take to continue to improve their customer service performance.

**Knowledge and understanding**

To be competent at leading a team to improve customer service you must know and understand:

- a. the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- b. how team and individual performance can affect the achievement of organisational objectives
- c. the implications of failure to improve customer service for your team members and your organisation
- d. how to plan work activities
- e. how to present plans to others to gain understanding and commitment
- f. how to facilitate meetings to encourage frank and open discussion
- g. how to involve and motivate staff to encourage teamwork
- h. how to recognise and deal sensitively with issues of underperformance.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- work plans/schedules
- staff training/development plans and records\*
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 can competently lead a team to improve 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 318

# Monitor the quality of customer service transactions (D13)

**Level:** 6

**Credit value:** 7

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?**

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

**Outcomes of effective performance**

When you monitor the quality of customer service transactions you must consistently:

**1 Prepare to monitor the quality of customer service transactions**

- 1a. identify the **criteria** against which quality of customer service transactions will be monitored
- 1b. agree a **sampling frame** for monitoring customer service transactions
- 1c. follow organisational procedures to ensure your monitoring plans are compliant with any need for staff and customers to know they are being observed
- 1d. identify ratings and scales against which quality of customer service transactions can be measured
- 1e. ensure that you are totally familiar with the customer service procedures for transactions you are monitoring.

**2 Monitor the quality of customer service transactions**

- 2a. carry out spot checks on, or observations of, the quality of customer service transactions
- 2b. carry out planned and routine checks on, or observations of, the quality of customer service transactions
- 2c. observe or listen to a colleague dealing with a customer service transaction
- 2d. record your observations of a colleague's performance against agreed quality criteria
- 2e. make judgements about your colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale
- 2f. analyse and summarise your observations to identify patterns and trends in your colleague's performance.

**3 Give feedback on the quality of customer service transactions**

- 3a. engage with your colleague in preparation for giving feedback on the quality of their customer service delivery
- 3b. provide positive feedback to your colleague by identifying features of customer service that they delivered particularly well
- 3c. give feedback to your colleague regarding features of their customer service delivery that would benefit from development
- 3d. propose actions for coaching or training of a colleague in areas that would improve their customer service delivery
- 3e. maintain records of customer service quality monitoring and action plans for improvements.



**Knowledge and understanding**

To be competent at monitoring the quality of customer service transactions you must know and understand:

- a. the criteria against which the quality of customer service delivery is judged in your organisation
- b. ways to construct a representative sample of customer service transactions in order to monitor quality
- c. the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service
- d. ways to define ratings and scales against which customer service transactions can be judged
- e. your organisation's procedures and guidelines for customer service delivery
- f. ways to record details of customer service transactions you have observed in order to provide feedback
- g. techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery
- h. the importance of providing positive feedback to a colleague prior to identifying areas for improvement
- i. sources of information about coaching and training options to improve customer service delivery
- j. the importance of keeping detailed records of coaching and training relating to customer service delivery.

## **Assessment guidance**

### **Criteria:**

- industry standards
- codes of practice
- organisational standards/service offer/customer charter

**Sampling frame:** The source from which the sample is drawn. It is a collection of data from a sample.

### **Evidence may be supplied by:**

- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- staff records
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

### **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 can monitor the quality of customer service transactions.

\*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 411

# Implement quality improvements to customer service (D14)

**Level:** 8  
**Credit value:** 10

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?**

Introducing quality improvements to customer service requires careful management of change. This unit covers the detailed planning of customer service improvements, managing the changes that need to take place to implement the improvements, and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular, it is vital to involve customers at all stages of the quality improvement process.

**Outcomes of effective performance**

When you implement quality improvements to customer service you must consistently:

**1 Plan the introduction of customer service improvements**

- 1a. identify possible customer service improvements and the **resources** available to implement them
- 1b. evaluate factors that may help or hinder the introduction of change
- 1c. develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues
- 1d. assess the risks associated with each action to effect change
- 1e. plan how you will evaluate the proposed improvements.

**2 Manage the implementation of customer service improvements**

- 2a. inform the people who will be affected by change, win their support and keep them informed of progress
- 2b. implement your plans for improvements dealing effectively with any difficulties
- 2c. provide the necessary support to all your colleagues who are involved with changes and improvements
- 2d. ensure that the planned improvements are implemented on time and within budget.

**3 Monitor and evaluate customer service improvements**

- 3a. monitor and evaluate the impact that the changes are having on the quality of customer service
- 3b. identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements
- 3c. identify any lessons from the change process and note these for future activities.

**Knowledge and understanding**

To be competent at implementing quality improvements to customer service you must know and understand:

- k. the importance of careful planning when introducing change
- l. the types of factors that may help or hinder the process of change and how to identify and plan for these
- m. how to develop plans that contain realistic objectives, tasks and schedules
- n. the importance of having clear lines of responsibility and accountability
- o. how to identify and plan for possible contingencies
- p. the importance of clear communication when changes are taking place
- q. why it is important to win the support of people who will be affected by change
- r. how to win over staff who are resistant to change
- s. the types of support that staff may need when improvements are being implemented and how to provide such support
- t. why it is important to complete change on time and within budget
- u. how to monitor and evaluate the impact of change
- v. why it is important to evaluate change and to note any lessons for future initiatives

## Assessment guidance

### Resources: eg

- finance
- staff- rotas, schedules, workloads
- materials

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- plans for improvements and change
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 implement quality improvements to customer service.

\*Internal/organisational policies and procedures 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 412

# Plan and organise the development of customer service staff (D15)

**Level:** 8

**Credit value:** 9

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?**

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process. This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

**Outcomes of effective performance**

When you plan and organise the development of customer service staff you must consistently:

**1 Identify customer service staff development and training needs**

- 1a. identify where customer service could be improved through staff training and development
- 1b. help staff providing customer service to identify their own development and training needs
- 1c. help staff to identify how they learn best
- 1d. agree the types of staff development and training activities that are needed
- 1e. report staff development needs to relevant people in your organisation.

**2 Organise customer service development and training**

- 2a. agree the aims and objectives of the customer service development and training activities
- 2b. agree the type and style of customer service development and training that are appropriate
- 2c. agree the detailed design of customer service development and training activities
- 2d. organise customer service development and training activities
- 2e. monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice
- 2f. organise additional help and training for staff where this is needed.



**Knowledge and understanding**

To be competent at planning and organising the development of customer service staff you must know and understand:

- a. the importance of continuously developing staff who provide customer service
- b. current objectives and targets that relate to customer service in your area of responsibility
- c. how to identify when development and training could improve customer service performance
- d. the range of types and styles of development and training and how to select those that are appropriate to customer service, your organisation, and specific training and development needs
- e. why it is important that you should have an input into the design and delivery of customer service development and training for your staff
- f. how you can help staff to put into practice what they have learned
- g. how to assess the impact that development and training has had on customer service performance
- h. the types of additional support you could provide to staff following development and training.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- development and training records
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 plan and organise the development of customer service staff.

\*Internal/organisational policies and procedures 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 416

## Review and re-engineer customer service processes (D19)

**Level:** 8  
**Credit value:** 11

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?**

From time to time, a customer process must be subject to review. Most of all, this is because both customer expectations and the external environment change. In addition to this, features of the process evolve as it is operated and the customer service purpose of various details can be lost. This unit is about a systematic approach to reviewing and re-engineering a customer service process. The review seeks a balance of customer satisfaction, cost awareness and compliance with regulation. The review must be undertaken with the agreement and support of those with authority to make changes. It must also take account of the views of those who deliver the process and are in direct contact with customers. This unit is for you if you are responsible for reviewing customer service processes. Do not use this unit if you do not hold that responsibility and do not have the support of those with authority to make changes.

**Outcomes of effective performance**

When you review and re-engineer customer service processes you must consistently:

**1 Scope the customer service processes to be reviewed**

- 1a. define the boundaries of a customer service process
- 1b. agree, with the appropriate people, the boundaries of the customer service process to be reviewed
- 1c. set parameters for the types of change that might be made during the re-engineering
- 1d. communicate with everybody involved regarding the aims of the review.

**2 Analyse the customer service process and identify improvement opportunities**

- 2a. identify all the key steps in the customer service process
- 2b. analyse each step in the customer service process in fine detail
- 2c. assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation
- 2d. raise questions about each step in the current process to establish where there is scope for development and improvement
- 2e. explore all the questions raised with those involved in the process and their managers
- 2f. identify options for re-engineering improvements that deserve further investigation.

**3 Evaluate improvement options and re-engineer service processes**

- 3a. evaluate each option for re-engineering improvements that deserve further investigation
- 3b. make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process
- 3c. plan the implementation of agreed recommendations for re-engineering the customer service process
- 3d. implement re-engineering of the customer service process
- 3e. monitor the results of implementing re-engineering of the customer service process.

**Knowledge and understanding**

To be competent at reviewing and re-engineering customer service processes you must know and understand:

- a. ways to establish boundaries around a customer service process to be re-engineered
- b. who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through
- c. the importance of communicating with those involved in service delivery when re-engineering the process
- d. ways to analyse and assess the effectiveness of separate steps in the customer service process
- e. the importance of identifying the right questions to challenge existing customer service processes appropriately
- f. techniques for implementing changes in customer service processes
- g. the importance of monitoring the effects of customer service process changes.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- analysis of information
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 review and re-engineer customer service processes.

\*Internal/organisational policies and procedures 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.

**Level: 7****Credit value: 7**

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?**

Customer service performance can be measured by a wide variety of metrics and ratings collected in different ways by different organisations. Those measurements are needed if you are to be able to manage performance systematically and take positive actions for improvement. Information on performance must be collected and interpreted in order to identify appropriate management actions to promote improvement. This may involve reference to standards, benchmarks, targets and tolerances and also the identification of trends and patterns in the evidence that is monitored. This unit is about those monitoring and management processes. This unit is for you if you have responsibility for the customer service performance of individuals or a team and you have the authority to see management actions through.

**Outcomes of effective performance**

When you manage customer service performance you must consistently:

**1 Monitor performance in customer service operations**

- 1a. collect regular statistics on customer service operations performance
- 1b. interpret broad patterns of customer service operations statistics
- 1c. investigate questions raised by interpretation and analysis of performance
- 1d. interpret statistics regarding customer service performance in specific product and service areas
- 1e. match customer service performance statistics to benchmarks, targets, standards or agreed tolerances
- 1f. use customer service performance statistics to identify trends
- 1g. compare customer service performance statistics with broader quality monitoring results
- 1h. review resource provision to identify any resource changes needed to improve customer service performance management.

**2 Take management actions to improve performance in customer service operations**

- 2a. identify management actions to maintain and improve on customer service performance
- 2b. summarise monitoring evidence to support the case for management actions to improve performance
- 2c. brief team members on changes they must make to improve customer service performance
- 2d. organise resource changes needed to improve customer service performance
- 2e. organise suitable coaching or training to improve customer service performance where development needs have been identified
- 2f. adjust customer service performance targets which have ceased to be both challenging and achievable.



**Knowledge and understanding**

To be competent at managing customer service performance you must know and understand:

- a. methods for collecting statistics on customer service operations performance
- b. techniques for interpreting customer service performance statistics
- c. the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)
- d. sources of benchmarks and standards for customer service performance
- e. techniques for identifying trends and patterns in customer service performance
- f. options for management actions that will improve customer service performance
- g. methods of coaching and training to improve customer service performance.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- statistical records
- records of analysis
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 manage customer service performance.

\*Internal/organisational policies and procedures 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 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.

**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 relevant to customer service operations
- b. organisational policies that link environmental issues with customer service
- c. principles of energy saving and reducing carbon emissions
- d. principles of waste management relevant to your organisation
- e. the environmental issues and risks represented by your organisation's services or products
- f. your organisation's procedures for energy, carbon emission and waste management
- g. how to keep customers informed about your organisation's environmental policies and procedures
- h. how to work with service partners to promote environmental and sustainable benefits
- i. organisational procedures for passing on ideas for environmental improvements
- j. the importance of having appropriate authority for implementing changes in customer service procedures
- k. 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:** 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 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.

**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.



**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 620

## Show understanding of the rules that impact on improvements in customer service (F4)

**Level:** 6

**Credit value:** 6

This unit is part of the Customer Service Theme of Customer Service Foundations. The 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?**

The job of a customer service professional is to develop and improve customer service. However, this must be done within a framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation. This unit is about the rules, regulation and legislation that can impact on the way you develop and improve customer service. It requires you to demonstrate that you follow those rules when taking actions to improve customer service.

**Outcomes of effective performance**

When you show understanding of the rules that impact on improvements in customer service you must consistently:

- 1 Show understanding of the organisational rules and procedures that impact on customer service improvements**
  - 1a. identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
  - 1b. show an awareness of the procedures and actions needed to secure approval for proposed improvements in customer service
  - 1c. agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements.
  
- 2 Show an understanding of the legislation and external regulation that impact on customer service improvements**
  - 2a. identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
  - 2b. identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
  - 2c. balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements.

**Knowledge and understanding**

To be competent at showing understanding of the rules that impact on improvements in customer service you must know and understand:

- a. organisational policies, procedures and practices that you need to take into account when you propose improvements in customer service
- b. how you gain approval to change customer service procedures or practices
- c. the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise improvements alone
- d. how you would involve colleagues or service partners in the implementation of improvements
- e. relevant legislation and external regulation relating to consumer protection and data protection**
- f. relevant legislation and external regulation relating to diversity, inclusion and discrimination**
- g. relevant legislation and external regulation relating to health and safety of customers and colleagues**
- h. the need to balance the requirements of legislation and external regulation with the needs and objectives of your organisation
- i. legislation and external regulation that affect customer service in your industry in particular.

## Assessment Guidance

### Consumer-related legislation eg

- Consumer Credit Act 2006
- Consumer Rights Act 2015
- 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

### Data Protection Legislation

- The Data Protection Act 1998

### 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 **will require 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 have competently shown understanding of the rules that impact on improvements in 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 621

## Deal with customers in writing or electronically (A13)

**Level:** 6

**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?**

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

**Outcomes of effective performance**

When you deal with customers in writing or electronically you must consistently:

**1 Use written or electronic communication effectively**

- 1a. operate equipment used to communicate in writing or electronically efficiently and effectively
- 1b. ensure that the period of time between exchanges in writing or electronically represents excellent customer service
- 1c. use language that is clear and concise
- 1d. adapt your use of language to meet the individual needs of your customer
- 1e. ensure that the style and tone of your written, or electronic communication, follows your organisation's guidelines and matches the service offer
- 1f. **follow the conventions and accepted practices of the communication channel or electronic platform you are using.**

**2 Plan and send an effective written or electronic communication**

- 2a. anticipate your customer's expectations taking account of any previous exchanges you may have had
- 2b. assemble all the information you need to construct the communication
- 2c. plan the objective of your communication
- 2d. format your communication following your **organisation's guidelines**
- 2e. open the communication positively to establish a rapport with your customer
- 2f. ensure that your customer is aware of the purpose of the communication as early as possible
- 2g. summarise the key point of the communication and any actions that you or your customer will take as a result.

**3 Handle incoming written or electronic communications effectively**

- 3a. read your customer's communication carefully to identify their precise reason for contacting you
- 3b. identify what they are seeking as the outcome of the contact
- 3c. identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- 3d. choose the option that is most likely to lead to customer satisfaction within the service offer
- 3e. summarise the outcome of the communication and any actions that you or your customer will take as a result.



**Knowledge and understanding**

To be competent at dealing with customers in writing or electronically you must know and understand:

- a. the importance of using clear and concise language
- b. the additional significance and potential risks involved in committing a communication to a permanent record format
- c. the effects of style and tone on the reader of a written or electronic communication
- d. the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- e. your **organisation's guidelines and procedures relating to written and electronic communication**
- f. how to operate equipment used for producing and sending written or electronic communications
- g. the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- h. the risks associated with the confidentiality of written or electronic communications
- i. the conventions and accepted practices of the channel of communication or electronic platform you are using.

## Assessment guidance

### Organisational guidelines and procedures:

- roles and responsibilities showing limits of authority
- service offer
- handling of customer issues
- house style
- tone
- use of templates

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- outgoing communication
- incoming communication with responses
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 deal with customers in writing or electronically.

\*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 622

# Organise the promotion of additional services or products to customers (A15)

**Level:** 6

**Credit value:** 7

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?**

This unit is about expanding and extending the relationship with your customers by persuading them to make use of additional services or products that you can offer. Your services or products will remain viable only if they are used by customers. The unit covers the way you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring your successes and failures and recognising the best way to approach your customers with additional services or products for the future. You need to show that you are promoting the services or products by encouraging more people to use them.

### Outcomes of effective performance

When you organise the promotion of additional services or products to customers you must consistently:

#### 1 Offer additional services or products

- 1a. offer **additional services or products** to your customers
- 1b. identify the benefits of offering additional services or products for your customers and the organisation
- 1c. explain the features and benefits of additional services or products to your customers
- 1d. identify ways of encouraging customers to ask about additional services or products.

#### 2 Organise support to promote use of additional services or products

- 2a. discuss with others **ways of promoting additional services or products** to your customers
- 2b. implement **procedures** to ensure that customers interested in additional services or products are dealt with promptly
- 2c. promote services or products which will suit your customers but are supplied from outside your own area of the organisation
- 2d. help customers to access services or products which are supplied outside of your own area of the organisation.

#### 3 Monitor the promotion of additional services or products

- 3a. devise methods to inform customers about additional services or products
- 3b. use different methods to inform customers about additional services or products and record successes and failures against each method
- 3c. use your record of successes and failures to identify the best approach for offering additional services or products
- 3d. share information with others regarding the best approach to take when offering additional services or products to your customers.

**Knowledge and understanding**

To be competent at organising the promotion of 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 the use of additional services or products will benefit your customers
- c. the main factors that influence customers to use your services or products
- d. how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- e. how to give appropriate, balanced information to your customers about services or products
- f. the importance of the influence of others when your customer is making decisions about additional services or products.

## 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.

### Ways of promoting additional products and/or services:

- listening to customer needs
- offering at point of sale
- selling to existing customers
- acting on information given by customers
- explaining how it will enhance the product/service.

### Organisational procedures which relate to:

- roles and responsibilities showing limits of authority
- service offer
- handling of customers.

### Evidence may be supplied by:

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

**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 organise the promotion of additional services or products to customers.

\*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 623

## Deliver customer service using service partnerships (B9)

**Level:** 6

**Credit value:** 6

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?**

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively. This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of your work. Do not choose this unit if you have difficulty identifying a service chain that relies on you in your role developing effective service partnerships.

**Outcomes of effective performance**

When you deliver customer service using service partnerships you must consistently:

**1 Work effectively within a customer service chain**

- 1a. explain who is involved in the **service chain** that supplies your end user customers
- 1b. identify which of those involved in your service chain is internal and which is external to your organisation
- 1c. explain how the way you work with individual **service partners** contributes to an overall service chain
- 1d. use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- 1e. work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- 1f. communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them.

**2 Build and nurture positive relationships in a customer service chain**

- 2a. create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
- 2b. identify where power and authority exist within the service chain
- 2c. negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- 2d. develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship
- 2e. work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- 2f. agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers.



## Unit 623

# Deliver customer service using service partnerships (B9)

### Knowledge and understanding

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

- a. the responsibilities and rights that can be built into an internal customer/supplier relationship
- b. the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- c. how to establish priorities if internal customer demands conflict with external customer demands
- d. how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- e. how to negotiate successfully with internal customers or suppliers
- f. the formal and informal structures of the organisation and how they can influence relationships
- g. how to use all available sources of information about strategic service partners and social media to develop positive working relationships.

### Assessment Guidance

**The service chain** covers those involved from the forecasting of demand all the way through the delivery of the service to post service delivery.

**Service partners** are those working together in the delivery of customer service.

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- customer records\*
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 deliver customer service using service partnerships.

\*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.

**Level:** 6

**Credit value:** 7

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?**

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition, you need to make extra efforts to delight your customers by exceeding their customer service expectations.

**Outcomes of effective performance**

When you improve the customer relationship you must consistently:

**1 Improve communication with your customers**

- 1a. select and use the best method of communication to meet your customers' expectations
- 1b. take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- 1c. adapt your communication to respond to individual customers' feelings
- 1d. monitor information about your interaction with customers using all available information channels.

**2 Balance the needs of your customer and your organisation**

- 2a. meet your customers' expectations within your organisation's **service offer**
- 2b. explain the reasons to your customers sensitively and positively when their expectations cannot be met
- 2c. identify alternative solutions for your customers either within or outside the organisation
- 2d. identify the costs and benefits of these solutions to your organisation and to your customers
- 2e. negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- 2f. take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation.

**3 Exceed customer expectations to develop the relationship**

- 3a. make extra efforts to improve your relationship with your customers
- 3b. recognise opportunities to exceed your customers' expectations
- 3c. take action to exceed your customers' expectations within the limits of your own authority
- 3d. gain the help and support of others to exceed your customers' expectations.

**Knowledge and understanding**

To be competent at improving the customer relationship you must know and understand:

- a. how to make best use of the method of communication chosen for dealing with your customers
- b. how to negotiate effectively with your customers
- c. how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- d. the importance of customer loyalty and/or improved internal customer relationships to your organisation
- e. how to monitor information about your interaction with customers from every available source including internet communication channels and social media platforms.

## Assessment Guidance

### Customer service offer:

A service offer defines the extent and limits of the customer service that an organisation is offering. (ICS glossary of terms).

The customer service offer will detail what the organisation will do for the customer eg deliver in 24 hours, that complaints will be responded to within 48 hours, outlines the returns policy.

### Evidence may be supplied by:

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

**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 improve the customer relationship.

\*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 625

# Analyse and report on the content of customer service feedback posted on social media platforms (D21)

**Level: 6**

**Credit value: 4**

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?**

For many organisations, important customer feedback can be found on social media platforms. Customers and influencers exchange opinions about the service they receive from organisations and those opinions may have a significant effect on those organisations' reputations. Sometimes communication through social media is an integral part of an organisation dealing with its customers. However, it also pays to monitor and review social media content more broadly in order to see patterns. This in turn may lead to suggestions for improvements to customer service and changes in the way an organisation deals with its customers. This unit is about taking a structured approach to the process of analysing and reporting on feedback obtained through the social media. You should choose this unit if one part of your job role involves monitoring of that process.

## Unit 625

# Analyse and report on the content of customer service feedback posted on social media platforms (D21)

### Outcomes of effective performance

When you analyse and report on the content of customer service feedback posted on social media platforms you must consistently:

#### **1 Collect and collate customer service feedback on social media platforms**

- 1a. search social media platforms for customer feedback
- 1b. identify customer service feedback posted as social media by customers
- 1c. select one or more methods for collecting customer feedback from social media platforms
- 1d. record the data you collect in a way that makes analysis and interpretation easy
- 1e. respect your customers' rights to confidentiality if they do not want their comments to be identified.

#### **2 Analyse customer service feedback gathered from social media platforms**

- 2a. confirm that customer service feedback posted on social media is accurate and valid
- 2b. classify and collate customer service feedback placed on social media platforms by customers
- 2c. assemble and collate customer service feedback on social media given in response to specific requests
- 2d. identify patterns and trends in customer service revealed by feedback from social media
- 2e. calculate and summarise patterns and trends in feedback from customers using social media platforms
- 2f. present your analysis in a form that is easily understood
- 2g. link your analysis with your organisation's service offer and customer service processes
- 2h. make recommendations about actions that may be appropriate in response to customer service feedback
- 2i. respond to customers service feedback through social media platforms where this is appropriate.

## Unit 625

# Analyse and report on the content of customer service feedback posted on social media platforms (D21)

### Knowledge and understanding

To be competent at analysing and reporting on the content of customer service feedback posted on social media platforms you must know and understand:

- a. random sampling techniques and how to evaluate bias in non-random sampling
- b. principles of questionnaire design
- c. how to search social media platforms for customer service feedback posted by customers
- d. how to ensure that customer service feedback posted on social media platforms is accurate and valid
- e. how to calculate the cost of a customer survey
- f. how to use appropriate software to record and analyse customer feedback
- g. methods of displaying and presenting data in a way that is easy to understand
- h. statistical techniques for summarising trends and patterns
- i. organisational procedures for recommending changes in your service offer or customer service procedures.



## Assessment guidance

### Valid:

Confirmed as accurate, authentic.

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- records of feedback
- records of analysis
- 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 analyse and report on the content of customer service feedback posted on social media platforms.

\*Internal/organisational policies and procedures 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.

**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.

**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.

**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.

**Level:** 7

**Credit value:** 6

This unit is part of the Customer Service Theme of Customer Service Foundations. The 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?**

Industries and organisations have developed a language and approach for customer service that is recognised and understood as the basis for service excellence. You need to understand and apply this language and approach if you are to become a true customer service professional. This unit is about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles in this unit influence all aspects of making customer service work and enable you to place professional customer practice in the context of your industry sector and your own organisation. Above all, working as a customer service professional involves working with colleagues to develop a deeper and broader understanding of customer service language and principles.

**Outcomes of effective performance**

When you show understanding of customer service you must consistently:

**1 Use accepted customer service language**

- 1a. communicate to customers your organisation's **service offer**, how it balances organisational and customer needs and how it meets customer expectations
- 1b. compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
- 1c. discuss with colleagues steps that team members can take to deal with different customers and different customer service situations.

**2 Apply customer service principles in your customer service role**

- 2a. follow the key policies and procedures in your organisation for the delivery of services or products
- 2b. show an awareness of how your organisation's service approach and service offer fit within your own industry and differ from those of other industries
- 2c. show an awareness of how your organisation's service approach and service offer differ from your organisation's competitors
- 2d. discuss with colleagues how your organisation's ethical and value base fits with organisational needs and customer expectations.

**Knowledge and understanding**

To be competent at showing understanding of customer service you must know and understand:

- a. how your organisation's service offer manages customer expectations within financial and other resource limitations
- b. how customers form their expectations of services or products
- c. how customer service can contribute to best value in a public sector or third sector organisation
- d. how customer service can provide a competitive advantage for a commercial organisation
- e. how you deal with different customer behaviours and personalities to achieve customer satisfaction
- f. the importance of effective communication and teamwork for the delivery of excellent customer service
- g. the importance of continuous improvement within customer service
- h. the key policies and procedures in your organisation for the delivery of services or products and why it is important to follow them
- i. how your industry's approach to customer service differs from the approach of one other industry
- j. the **service offer** of competitors of your organisation or any organisations offering similar services or products
- k. the features and benefits of your organisation's services or products that influence customer service delivery and customer satisfaction
- l. how your organisation balances its needs and goals with customer expectations and needs
- m. the ethical and value base of your organisation's approach to customer service.



## Assessment Guidance

### Customer service offer:

A service offer defines the extent and limits of the customer service that an organisation is offering. (ICS glossary of terms).

The customer service offer will detail what the organisation will do for the customer eg deliver in 24 hours, that complaints will be responded to within 48 hours, outlines the returns policy.

### 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 **will require 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 have competently shown understanding of customer service principles.

\*Internal/organisational policies and procedures 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 721

## Use customer service as a competitive tool (A14)

**Level:** 7

**Credit value:** 8

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?**

Customer service contributes to an organisation's competitive position. Customers of many organisations have choices about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference to which supplier the customer chooses. This unit is about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services or products. The unit is not for you if your organisation does not compete actively with others.

**Outcomes of effective performance**

When you use customer service as a competitive tool you must consistently:

**1 Organise customer service to gain a competitive advantage**

- 1a. develop your own and colleagues' understanding of the services and products offered by your organisation
- 1b. define your organisation's **service offer** and the ways in which it compares with those of your competitors
- 1c. set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- 1d. encourage customer service actions that create and develop customer loyalty.

**2 Deliver a competitive service**

- 2a. take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- 2b. remind your customers about your service offer and the extra benefit it provides over those of your competitors
- 2c. offer additional technical advice to customers within your organisation's service offer
- 2d. show awareness of the financial implications of any added value actions that you or your colleagues might offer
- 2e. meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- 2f. re-direct customers to other service providers without causing offence when their expectations cannot be met by your organisation's service offer
- 2g. ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- 2h. encourage colleagues to offer **complementary services or products** when customer satisfaction indicates that your customers would be interested in them.

**Knowledge and understanding**

To be competent at using customer service as a competitive tool you must know and understand:

- a. the factors that lead to customers' belief that they are enjoying value for money
- b. how to research and compare services or products, including using the internet and social media sources
- c. the services and products offered by your organisation
- d. the services and products offered by competitors
- e. features and benefits of services or products that are seen by customers as added value
- f. the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- g. how to portray a positive image that reinforces your organisation's competitive position
- h. your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- i. **complementary services or products** that may be of interest to your customers.

## Assessment Guidance

### Customer service offer:

A service offer defines the extent and limits of the customer service that an organisation is offering. (ICS glossary of terms).

The customer service offer will detail what the organisation will do for the customer eg deliver in 24 hours, that complaints will be responded to within 48 hours, outlines the returns policy.

### Complementary services or products

Products or services that accompany and support the initial product or service.

### Evidence may be supplied by:

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

**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 can competently use customer service as a competitive tool.

\*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 722

## Build a customer service knowledge base (A16)

**Level:** 7

**Credit value:** 7

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?**

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

**Outcomes of effective performance**

When you build a customer service knowledge base you must consistently:

**1 Input details of customer queries and requests and develop responses**

- 1a. Identify, through active listening, customer queries and comments for inclusion in the knowledge base
- 1b. classify information, collected through customer contact, for inclusion in the knowledge base
- 1c. identify questions frequently asked by customers
- 1d. identify the broad customer service messages of your organisation's answers to frequently asked questions
- 1e. work with colleagues to develop responses to customer queries and requests
- 1f. contribute ideas and responses to the customer knowledge base which build on key organisational customer service messages
- 1g. check the effects of possible responses, included in the knowledge base, with customers during live customer service delivery or in trials
- 1h. monitor the customer service knowledge base to identify trends and patterns.

**2 Use a customer service knowledge base**

- 2a. access information from the customer service knowledge base using specific search criteria
- 2b. browse the customer service knowledge base to research a topic of interest or project area
- 2c. use the customer service knowledge base to inform the introduction of a new product or service variation
- 2d. use the customer service knowledge base to respond to a specific customer request or query
- 2e. assist a colleague to locate specific information in the customer service knowledge base
- 2f. add to the customer service knowledge base as a result of dealing with a customer request or query.

**Knowledge and understanding**

To be competent at building a customer service knowledge base you must know and understand:

- a. the structure and content of your organisation's customer service knowledge base
- b. input and update routines for adding to the customer service knowledge base
- c. ways in which information for a customer service knowledge base can be drawn from different sources, including social media platforms
- d. ways that information in a customer service knowledge base can be classified
- e. questions frequently asked by customers of your organisation
- f. the importance of working with colleagues to develop responses to customer requests and queries
- g. your organisation's key messages in relation to the services or products you are delivering
- h. ways to interpret information in a customer service knowledge base
- i. techniques for assisting a colleague to locate information in a customer service knowledge base.



## Assessment Guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- knowledge base
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 build a customer service knowledge base.

\*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.

**Level:** 7

**Credit value:** 7

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?**

This unit covers the key competence of the customer service professional. You must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. You need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

**Outcomes of effective performance**

When you promote continuous improvement you must consistently:

**1 Plan improvements in customer service based on customer feedback**

- 1a. gather **feedback** from customers that will help to identify opportunities for customer service improvement
- 1b. analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- 1c. discuss with others the potential effects of any proposed changes for your customers and your organisation
- 1d. negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change.

**2 Implement changes in customer service**

- 2a. organise the implementation of authorised changes
- 2b. implement the changes following organisational guidelines
- 2c. inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- 2d. monitor early reactions to changes and make appropriate fine-tuning adjustments.

**3 Review changes to promote continuous improvement**

- 3a. collect and record feedback on the effects of changes
- 3b. analyse and interpret feedback and share your findings on the effects of changes with others
- 3c. summarise the advantages and disadvantages of the changes
- 3d. use your analysis and interpretation of changes to identify opportunities for further improvement
- 3e. present these opportunities to somebody with sufficient authority to make them happen.

**Knowledge and understanding**

To be competent at promoting continuous improvement you must know and understand:

- a. how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- b. how customer experience is influenced by the way service is delivered
- c. how to collect, analyse and present customer feedback
- d. how to make a business case to others to bring about change in the products or services you offer
- e. how developments in communication channels such as social media present opportunities for customer service improvements.

## Assessment guidance

### Techniques for gathering customer feedback:

- email
- short surveys
- full-length surveys
- online
- face to face interviews
- focus groups
- comment boxes/cards
- social media
- telephone
- text

### 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:** 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 promote continuous improvement.

\*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 724

## Gather, analyse and interpret customer feedback (D12)

**Level:** 7  
**Credit value:** 10

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?**

Customer service can be improved only if you are fully aware of customer wishes and expectations. You can discover much of this information by seeking structured feedback from your customers about their experiences of your services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is all about how you collect that feedback and prepare it for use in the improvement of customer service.

**Outcomes of effective performance**

When you gather, analyse and interpret customer feedback you must consistently:

**1 Plan to gather customer feedback**

- 1a. identify the options available for collecting customer service feedback
- 1b. evaluate the costs and benefits of each option for collecting customer feedback
- 1c. select one or more **methods for collecting customer feedback**
- 1d. plan, in detail, what information you will collect from customers
- 1e. ensure the information you collect has a customer service focus
- 1f. plan, in detail, how you will collect information from customers using your chosen method.

**2 Gather customer feedback**

- 2a. use your chosen method and detailed plan to collect customer feedback
- 2b. monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
- 2c. monitor the collection of customer feedback to ensure it focuses on customer service issues
- 2d. record the data you collect in a way that makes analysis and interpretation easy
- 2e. respect your customers' rights to confidentiality if they do not want their comments to be identified.

**3 Analyse and interpret customer feedback**

- 3a. collate data collected from customers in order to identify patterns and trends in customer service
- 3b. perform appropriate calculations to summarise patterns and trends in the data
- 3c. present your analysis in a form that is easily understood
- 3d. link your analysis with your knowledge of your organisation's service offer and customer service processes in order to interpret the meaning of the data
- 3e. make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
- 3f. identify ways in which customer feedback can be used to inform customers and develop the customer relationship.

**Knowledge and understanding**

To be competent at gathering, analysing and interpreting customer feedback you must know and understand:

- a. random sampling techniques and how to evaluate bias in non-random samples
- b. principles of questionnaire design
- c. principles of effective interviewing
- d. how to calculate the cost of a customer survey
- e. techniques for monitoring data collection
- f. how to use appropriate software to record and analyse customer feedback
- g. methods of displaying and presenting data in a way that is easy to understand
- h. statistical techniques for summarising trends and patterns
- i. organisational procedures for recommending changes in the service offer or customer service procedures
- j. the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups, through internet, e-mail or social media
- k. the importance of validating feedback submitted through electronic channels such as social media to ensure that it represents genuine customer opinions.



## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- customer feedback and customer records
- feedback analysis
- organisational policies and procedures\*
- legislative and regulatory requirements\*
- organisational documentation\*

**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 can competently gather, analyse and interpret customer feedback.

\*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 725

# Develop a customer service network through social media platforms (D22)

**Level: 7**

**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?**

Social media marketing represents a defined route for tackling all marketing activities using social media platforms. Especially where social media marketing is used, an organisation is likely to choose on-going use of social media to deliver customer service both proactively and reactively. This involves establishing and maintaining an appropriate presence on commonly used social media platforms. It also involves dealing with customers through those platforms so that a social media community is linked directly with each other and with the organisation. This Standard is all about the customer service actions needed to maintain and develop a customer network using social media platforms as important channels of communication. You should choose this Standard if your customer service role includes a full and active involvement with social media platform uses for customer service.

**Outcomes of effective performance**

When you develop a customer service network through social media platforms you must consistently:

- 1 Identify and develop customer service processes that can be enhanced using social media**
  - 1a. analyse customer service processes that are essential to your organisation's service offer, services or products
  - 1b. identify social media platforms which are most likely to be used by your organisation's customers
  - 1c. research the ways in which your organisation and others currently use social media platforms for customer service
  - 1d. draw up a profile of how your customers and potential customers use social media platforms
  - 1e. identify social media communities that are relevant to your organisation's customer service processes
  - 1f. draw up profiles of the social media communities that are relevant to your organisation's customer service processes
  - 1g. identify and define improvements that could be made to your organisation's use of social media for customer service
  - 1e. check your proposed improvements comply with regulation relating to the use of social media.
  
- 2. Manage on-going delivery of customer service using social media**
  - 2a. plan enhanced use of social media to deliver customer service using data gathered when reviewing existing social media uses
  - 2b. work with colleagues to allocate responsibilities for making improvements to social media use for customer service
  - 2c. contribute to the development of procedures for providing customer service to customers and social media communities
  - 2d. contribute to the implementation of improvements in customer service using social media
  - 2e. monitor the effects of improvements to customer service using social media
  - 2f. review use of social media for delivery of customer service using data collected through monitoring to identify further improvements.

**Knowledge and understanding**

To be competent at developing a customer service network through social media platforms you must know and understand:

- a. how to analyse customer service processes
- b. your organisation's service offer, services or products
- c. the mainstream and niche social media platforms used by customers
- d. how organisations use social media platforms for customer service
- e. how to profile customers who use particular social media platforms
- f. the importance of making an impact on social media communications
- g. how social media communications work
- h. regulations relating to the use of social media
- i. ways to develop improvements in the use of social media for customer service delivery
- j. the importance of teamwork when seeking to devise and implement customer service improvements using social media
- k. how to devise and present procedures for providing customer service using social media
- l. how to select the data required for monitoring and observing improvements to customer service using social media
- m. how to monitor the effects of improvements to customer service when observing social media data
- n. metrics that may be used to monitor improvements to customer service using social media.

## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 developed a customer service network through social media platforms.

\*Internal/organisational policies and procedures 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 800

# Develop a customer service strategy for a part of an organisation (D16)

**Level:** 8  
**Credit value:** 11

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?**

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. This contribution is also based on what they know of other organisations and published research into trends in customer service. This unit does not assume you have full responsibility for your organisation's customer service strategy but that you take a major role in the development of strategy for a particular part of your organisation.

**Outcomes of effective performance**

When you develop a customer service strategy for a part of an organisation you must consistently:

- 1 Research and evaluate your organisation's business and customer service strategy**
  - 1a. identify your organisation's values, aims and objectives
  - 1b. identify the role of a given part of the organisation in achieving the strategy
  - 1c. evaluate the implications of the strategy for customer service in this part of the organisation
  - 1d. confirm the implications of the strategy for customer service with colleagues
  - 1e. collect information on and analyse customer expectations
  - 1f. match customer expectations with the customer service implications of the business strategy for a given part of your organisation.
  
- 2 Help to identify current and future best practice in customer service**
  - 2a. identify other organisations which represent models of good practice in customer service
  - 2b. evaluate the key features of customer service in these organisations and the principles that underpin their approaches
  - 2c. identify and analyse current research on trends and developments in customer service
  - 2d. identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
  - 2e. explore the implications of your research for the part of the organisation you are working in
  - 2f. discuss the outcomes of your research with colleagues.
  
- 3 Identify and recommend the key features of a customer service strategy**
  - 3a. identify values, aims and objectives that are consistent with your research
  - 3b. identify contact processes and channels for customer service that are consistent with your values, aims and objectives
  - 3c. identify how you will evaluate the effectiveness of the strategy
  - 3d. discuss with colleagues the key features of a customer service strategy
  - 3e. construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers.

**Knowledge and understanding**

To be competent at developing a customer service strategy for a part of an organisation you must know and understand:

- a. the importance of having a customer service strategy for a given part of the organisation
- b. how to access information on your organisation's overall business strategy and analyse its implications
- c. sources of information you can use to find out about your customers and their expectations
- d. the benefits of using information about customers and their expectations available through social media
- e. the importance of customer loyalty and customer service practices that can help to retain loyalty
- f. how to identify other organisations which might represent models of best practice in customer service
- g. sources of research on trends and developments in customer service
- h. how to develop values, aims and objectives relevant to customer service
- i. procedures for making recommendations within your organisation.



## Assessment guidance

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- analysis of information
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 implement quality improvements to customer service.

\*Internal/organisational policies and procedures 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 801

## Manage a customer service award programme (D17)

**Level:** 8

**Credit value:** 7

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?**

This unit is about the competences involved in managing a customer service award programme for individuals or teams within an organisation. A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers your commitment to customer service. Whilst such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take full account of the strategic customer service implications.

**Outcomes of effective performance**

When you manage a customer service award programme you must consistently:

**1 Plan a customer service award programme**

- 1a. identify all the possible options for a **customer service award** scheme drawing on examples inside and outside of your own organisation
- 1b. identify the benefits and drawbacks of each option for a customer service award programme
- 1c. choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
- 1d. plan the details of your chosen customer service award programme
- 1e. identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
- 1f. make a business case for the introduction of a customer service awards programme or for the development of an existing programme.

**2 Implement and manage a customer service award programme**

- 2a. launch developments in the customer service award programme in a way that informs and motivates customers and team members
- 2b. ensure that the criteria for the customer service awards are transparent and are considered fair by team members
- 2c. publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service
- 2d. organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole
- 2e. announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
- 2f. review and evaluate the effects of the customer service awards programme on customers and team members.

**Knowledge and understanding**

To be competent at managing a customer service award programme you must know and understand:

- a. the principles of motivation and in particular the importance of recognition as a motivator
- b. how to make use of **customer service award programmes** as promotional tools to give added value to customer satisfaction
- c. the benefits and drawbacks of different rewards associated with award programmes
- d. aspects of organisational culture that may support or detract from the value of a customer service award programme.

## Assessment guidance

### Customer service award programme:

Can cover a wide variety of subject areas eg

- employee of the month
- apprentice of the year
- most beneficial suggestion for improvement.

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- business case
- customer service award programme records
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 managed a customer service award programme.

\*Internal/organisational policies and procedures 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 802

# Apply technology or other resources to improve customer service (D18)

**Level:** 8  
**Credit value:** 11

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?**

Customer service changes and improves sometimes through the application of technology or other resources as much as through changes in behaviour of those delivering the service. Whilst these changes can bring real benefits they inevitably come at an initial cost which must be taken into consideration. This unit is about the process of managing the application of technology or other resources to a customer service process. It involves a systematic approach to considering and evaluating options, implementing the most appropriate and reviewing the results.

**Outcomes of effective performance**

When you apply technology or other resources to improve customer service you must consistently:

**1 Identify and specify opportunities for customer service improvement**

- 1a. monitor developments in technology and the use of other resources to improve customer service
- 1b. review customer service delivery systems with specific reference to use of resources and technology
- 1c. identify opportunities and options for improving customer service by applying technology or other resources
- 1d. analyse the customer service benefits that could result from options for improvement
- 1e. specify the changes in technology or other resources needed to deliver the options.

**2 Evaluate options for applying technology or other resources to improve customer service**

- 2a. identify the options for improving customer service with the application of technology or other resources
- 2b. establish the costs associated with each option for improving customer service
- 2c. list and, where possible, quantify the benefits from each option for improving customer service
- 2d. estimate the affordability of each option to improve customer service
- 2e. recommend the most appropriate options for implementation
- 2f. identify the probable effects of any recommended changes on your organisation's service offer and customer perceptions
- 2g. plan a **business case** to support your recommendations for improvements through application of technology or other resources.

**3 Oversee the implementation of resource changes to improve customer service**

- 3a. plan implementation using details of agreed developments to improve customer service
- 3b. brief colleagues about the implementation of customer service improvements and the expected benefits
- 3c. monitor implementation of customer service improvements and the expected benefits
- 3d. review implementation of customer service improvements with colleagues
- 3e. make appropriate adjustments to implementation of customer service improvements as a result of review.

**Knowledge and understanding**

To be competent at applying technology or other resources to improve customer service you must know and understand:

- a. current trends in **information and communication technology** (ICT) that imply changes to the channels and social media platforms used by customers
- b. features and functionality of available technology that may contribute to improvements in customer service
- c. how the application of additional **resources**, other than technology, can be used to improve customer service
- d. methods for the systematic review of customer service systems
- e. techniques to analyse the costs and benefits of options for improving customer service
- f. methods for presenting a **business case** for applying technology or other resources to make improvements in customer service
- g. briefing techniques for introducing colleagues to changes
- h. ways to review and adjust customer service delivery after the implementation of changes.



## Assessment guidance

### Business case:

A fully documented business case including costs has to be produced.

### Information and communication technology:

- customer relationship and information management systems
- internet and intranet and social media
- self-service in supermarket shopping
- click and drop
- click and pick-up

### Resources:

- finance
- staff- rotas, schedules, workloads
- materials

### Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- business case
- analysis of information
- organisational documentation
- organisational policies and procedures\*
- legislative and regulatory requirements\*

**Note:** Here the candidate **will require 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 technology or other resources to improve customer service.

\*Internal/organisational policies and procedures 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 6						
		C	N	PS	WVO	ICT
F3	Show understanding of customer service	6	-	-	6	6
F4	Show understanding of the rules that impact on improvements in customer service	6	-	-	6	6
A13	Deal with customers in writing or electronically	6	6	6	6	6
A14	Use customer service as a competitive tool	6	6	6	6	6
A15	Organise the promotion of additional services or products to customers	6	6	6	6	6
A16	Build a customer service knowledge base	6	6	6	6	6
B9	Deliver customer service using service partnerships	6	6	6	6	6
B10	Organise the delivery of reliable customer service	6	6	6	6	6
B11	Improve the customer relationship	6	6	6	6	6
B17	Deliver customer service in an environmentally friendly and sustainable way	5	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
D8	Work with others to improve customer service	6	-	6	6	-
D9	Promote continuous improvement	6	6	6	6	6
D10	Develop your own and others' customer service skills	6	6	6	6	6
D11	Lead a team to improve customer service	6	6	-	6	6
D12	Gather analyse and interpret customer feedback	6	6	-	6	6
D13	Monitor the quality of customer service transactions	6	6	6	6	6
D14	Implement quality improvements to customer service	6	6	6	6	6
D15	Plan and organise the development of customer service staff	6	6	6	6	6
D16	Develop a customer service strategy for a part of an organisation	6	6	6	6	6
D17	Manage a customer service award programme	6	6	6	6	6
D18	Apply technology or other resources to improve customer service	6	6	6	6	6
D19	Review and re-engineer customer service processes	6	6	6	6	6
D20	Manage customer service performance	6	6	6	6	6
D21	Analyse and report on the content of customer service feedback posted on social media	6	6	6	6	6
D22	Develop a customer service network through social media platforms	6	6	6	6	6

C=Communication; N= Numeracy; PS=Problem Solving; WVO= 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](http://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.

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[www.cityandguilds.com](http://www.cityandguilds.com)

## Useful contacts

### UK learners

E: [learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)

### General qualification information

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#### International learners

F: +44 (0)20 7294 2413

General qualification information

E: [intcg@cityandguilds.com](mailto:intcg@cityandguilds.com)

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#### Centres

F: +44 (0)20 7294 2413

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

E: [centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)

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#### Single subject qualifications

F: +44 (0)20 7294 2413

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 2404 (BB forms)

E: [singlesubjects@cityandguilds.com](mailto:singlesubjects@cityandguilds.com)

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#### International awards

F: +44 (0)20 7294 2413

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

E: [intops@cityandguilds.com](mailto:intops@cityandguilds.com)

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#### Walled Garden

F: +44 (0)20 7294 2413

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

E: [walledgarden@cityandguilds.com](mailto:walledgarden@cityandguilds.com)

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#### Employer

T: +44 (0)121 503 8993

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

E: [business\\_unit@cityandguilds.com](mailto:business_unit@cityandguilds.com)

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#### Publications

F: +44 (0)20 7294 2413

Logbooks, Centre documents, Forms, Free literature

**If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email:**  
[feedbackandcomplaints@cityandguilds.com](mailto:feedbackandcomplaints@cityandguilds.com)

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