

SVQ in Customer Service at SCQF Level 8 (4427-40)

Qualification handbook for centres



www.cityandguilds.com
September 2016
Version 1.0

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Introduction to the qualification

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

Qualification title and level	SVQ in Customer Service at SCQF Level 8
City & Guilds qualification number	4427-40
Qualification accreditation number	GL7V 48
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The SVQ in Customer Service at SCQF Level 8 qualification provides opportunities to recognise the development and implementation of customer service strategies at an operational level. Candidates may not necessarily be responsible for other people within the workplace as their main role will be to ensure effective processes and practice are in place to achieve and continually improve customer service across an entire team, department or organisation, managing change as necessary. The flexible structure of the qualification enables individuals to develop the skills to manage and resolve challenging issues raised by customers. They may implement customer service management software to support their strategy.

Contacting Skills CFA

Tel: 020 7091 9620

Website: www.skillscfa.org

The Institute of Customer Service (ICS)

Tel: 020 7260 2620

Website: www.instituteofcustomerservice.com

Qualification structure

To achieve the **SVQ in Customer Service at SCQF Level 8**, learners must achieve:

Minimum of 8 units of which:

Three 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 completed in **Group D: Optional Units**

Two further units can be selected from any of **Groups B, C and D**

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

City & Guilds unit number	Group A Mandatory Units	SCQF Level	SCQF Credit
4427-810	Show understanding of customer service management (F5)	8	10
4427-811	Follow organisational rules, external regulations and legislation when managing customer service (F6)	8	10
4427-815	Handle referred customer complaints (C8)	8	10

City & Guilds unit number	Group B Optional Units	SCQF Level	SCQF Credit
4427-403	Champion customer service (A17)	8	10
4427-404	Make customer service environmentally friendly and sustainable (A18)	8	11

City & Guilds unit number	Group C Optional Units	SCQF Level	SCQF Credit
4427-405	Maintain and develop a healthy and safe customer service environment (B12)	8	8
4427-812	Plan, organise and control customer service operations (B13)	8	10
4427-813	Review the quality of customer service (B14)	8	8
4427-814	Build and maintain effective customer relations (B15)	8	8
4427-409	Deliver seamless customer service with a team (B16)	8	8

City & Guilds unit number	Group D Optional Units	SCQF Level	SCQF Credit
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 service (D18)	8	11
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 platform (D22)	7	5

Opportunities for progression

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

- SVQs in other work-related areas (for example Administration and other technical sectors)

Qualification support materials

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

Description	How to access
Generic candidate recording forms	www.cityandguilds.com
Centre guide	www.cityandguilds.com
Promotional materials	www.cityandguilds.com

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 4 in Customer Service at SCQF Level 8 (4427-04) will be given automatic approval for the new SVQ in Customer Service at SCQF Level 8 (4427-40). 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 quality assure 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 organisation to select and appoint EQAs

The Assessor, IQA and EQA working at SCQF level 8 must have:	This can be evidenced by:	A	IQA	EQA
A thorough understanding of the National Occupational Standards in Customer Service at SCQF Level 8 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 SVQ at SCQF Level 8	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards SCQF at Level 5, 6 or 8 Customer Service SVQ	✓	✓	✓
Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and SVQs at SCQF Level 8	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. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are	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	✓	✓	✓

working to the Assessor and/or Verifier qualification unit 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	✓	✓	✓
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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.

Candidate entry requirements

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

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

Realistic Working Environment (RWE)

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

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

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

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To undertake 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 18 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.

Course design and delivery

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.

Recommended delivery strategies

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

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

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

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen www.smartscreen.co.uk
- Useful material is available from www.cfa.uk.com

Assessment

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.

Evidence requirements

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

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.

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**

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

Level: 8
Credit value: 10

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

What is the unit about?

Staff, with high levels of responsibility for customer service, have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit. This unit is about acting as a champion – being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your knowledge and expertise to others.

Outcomes of effective performance

When you champion customer service you must consistently:

1 Promote the importance and benefits of customer service

- 1a. explain the role of customer service within your organisation's strategic and business plans
- 1b. continuously monitor developments in your organisation in order to identify those important to customer service
- 1c. analyse the implications of customer service developments in your organisation
- 1d. question and challenge developments from the customer's standpoint
- 1e. use your influence to ensure that developments improve customer service.

2 Provide advice and information on customer service issues

- 2a. make it known that you can provide customer service advice and information
- 2b. respond to requests for customer service advice and information
- 2c. carry out any necessary research to enhance or verify the advice and information you are giving
- 2d. communicate customer service advice and information effectively
- 2e. help others to explore the implications of your advice and information for their own work and identify actions that the advice and information might prompt
- 2f. monitor how effective your advice and information has been
- 2g. review the way you collect information, formulate advice and communicate it to others.

Knowledge and understanding

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

- a. the processes for decision making within your organisation and who is involved
- b. how to monitor developments within your organisation
- c. how to use your influence and authority to affect decision making
- d. the types of developments that are likely to affect customer service and how to analyse the implications for customer service
- e. the importance of empathising with customers and how to represent their viewpoint in a constructive way
- f. how to identify when others need advice and information on customer service issues
- g. how to use different types of research to support your advice and information on customer service
- h. how to apply your advice and information in practice
- i. how to monitor the effect of your advice and information.

Assessment guidance

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- professional discussion
- reflective account
- organisation's operational plans and developments*
- customer and staff feedback
- organisational policies and procedures*
- organisational documentation*

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 championed customer service.

*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 404

Make customer service environmentally friendly and sustainable (A18)

Level: 8
Credit value: 11

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

What is the unit about?

Environmental awareness and positive action form an important aspect of strategy for many organisations. Customer service may impact on environmental performance by demanding additional resources. Environmental policies may impact on customer service by placing restrictions on how it can be delivered. Periodically, the link between customer service and environmentalism needs to be reviewed so that appropriate changes may be made. Environmental and sustainability awareness must be encouraged constantly so that staff, suppliers, customers and other stakeholders are reminded of their contributions and responsibilities. This unit is appropriate for you if your job involves responsibility for customer service and sufficient authority to review and promote environmental matters in your organisation or in some part of it.

Outcomes of effective performance

When you make customer service environmentally friendly and sustainable you must consistently:

1 Review and monitor environmental and sustainability aspects of customer service

- 1a. identify your organisation's policies on customer service and on the environment and trace links between the two
- 1b. identify your organisation's policy on energy management and carbon emissions and their key links with customer service systems
- 1c. identify your organisation's policy on waste management and its key links with customer service systems
- 1d. carry out a systematic review of your organisation's customer service systems to identify opportunities for environmental improvements
- 1e. identify service partnerships that affect your organisation's environmental profile and what they might do to improve it
- 1f. develop an action plan to promote environmental actions and improvements in your organisation's customer service delivery.

2 Promote environmental and sustainable aspects of customer service in your organisation

- 2a. make links between your organisation's environmental policies and customer service delivery routines
- 2b. encourage those involved in customer service delivery to promote an environmental approach by customers
- 2c. identify and promote ways to minimise resource use in customer service delivery
- 2d. communicate your organisation's environmental policies to service partners including suppliers and encourage their participation in environmental improvements
- 2e. communicate your organisation's environmental policies to customers and encourage their participation in environmental improvements
- 2f. develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability
- 2g. develop community stakeholder's awareness of your organisation's environmental policies and approaches.

Knowledge and understanding

To be competent at making customer service environmentally friendly and sustainable you must know and understand:

- a. principles of environmentalism and sustainability that are relevant to customer service operations
- b. ways to express environmental policies and link them with customer service
- c. principles of energy management and reduction of carbon emissions
- d. principles of waste management relevant to your organisation
- e. techniques for reviewing environmental aspects of customer service systems
- f. different actions that may be taken to improve environmental aspects of customer service delivery
- g. ways to minimise resource use in customer service delivery
- h. techniques for communicating and developing awareness of environmental matters among stakeholders
- i. ways to encourage customers to act more environmentally friendly.

Assessment guidance

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- professional discussion
- reflective account
- organisation's operational plans relating to the environment, energy and waste management and
- sustainability *
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

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 made customer service environmentally friendly and sustainable within the organisation.

*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 405

Maintain and develop a healthy and safe customer service environment (B12)

Level: 8
Credit value: 8

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

What is the unit about?

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers. This unit is about managing the delivery of services or products in a way that is safe for customers and colleagues.

Outcomes of effective performance

When you maintain and develop a healthy and safe customer service environment you must consistently:

1 Assess the customer service environment for factors that affect health and safety

- 1a. identify health and safety hazards in your customer service environment
- 1b. assess the risks associated with these hazards
- 1c. identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers
- 1d. evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against your organisation's policies and procedures and customer expectations
- 1e. provide information about risks and hazards to those responsible for health and safety.

2 Minimise risks to health and safety in the customer service environment

- 2a. ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety
- 2b. ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures
- 2c. ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them
- 2d. enable staff to identify and report health and safety hazards
- 2e. use agreed organisational procedures to deal with hazards when they occur
- 2f. review the health and safety aspects of the customer service environment, as required by law and your organisation
- 2g. carry out emergency drills within your area of responsibility
- 2h. follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents.

Knowledge and understanding

To be competent at maintaining and developing a healthy and safe customer service environment you must know and understand:

- a. the importance of maintaining a healthy, safe and effective working environment for customers and staff
- b. your responsibilities for health and safety in the workplace
- c. your responsibilities for maintaining an effective working environment
- d. how to access information on legal and regulatory requirements for health and safety and relevant codes of practice
- e. the types of health and safety hazards that are likely to occur in your area of responsibility
- f. how to assess the risks associated with these health and safety hazards
- g. how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice
- h. your organisation's policies and procedures for health and safety
- i. the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment.

Assessment guidance

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- professional discussion
- reflective account
- organisation's operational plans relating to health and safety
- organisational documentation including health and safety records
- 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 maintain and develop a healthy and safe customer service environment within the organisation.

*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 409

Deliver seamless customer service with a team (B16)

Level: 8
Credit value: 8

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

What is the unit about?

Excellent customer service is a team effort. You cannot win and maintain the loyalty of customers without pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities. The team probably includes colleagues, senior managers and service partners who are working in other departments or outside organisations but still contribute to customer service delivery. To achieve your organisation's aims and objectives for customer service you will need to have effective working relationships with all of these – especially when you urgently need their co-operation and support.

Outcomes of effective performance

When you deliver seamless customer service with a team you must consistently:

1 Build effective working relationships with colleagues

- 1a. identify and agree with colleagues team strategies for delivering seamless customer service
- 1b. share information and knowledge to improve customer service
- 1c. encourage, accept and respond positively to feedback from colleagues on customer service performance
- 1d. work with colleagues to deal with conflict constructively
- 1e. review teamwork strategies for delivering seamless customer service with colleagues.

2 Build effective relationships with service partners

- 2a. identify the **service partners** who are most significant to delivery of seamless customer service
- 2b. take opportunities to establish and develop effective working relationships with **service partners**
- 2c. ensure that your commitments to **service partners** and their commitments to you are being fulfilled as agreed
- 2d. communicate clearly and in good time with **service partners** on issues that affect them and your customers
- 2e. work together with **service partners** to resolve customer service problems
- 2f. work together with **service partners** to deal with conflict constructively.

Knowledge and understanding

To be competent at delivering seamless customer service with a team you must know and understand:

- a. how to analyse the contribution and roles of colleagues and service partners when delivering customer service
- b. the types of support you could provide to colleagues and service partners and they could provide to you to deliver seamless customer service
- c. the benefits and challenges of collaborative working, what may go wrong and how to prepare for this
- d. the value and importance of effective communication with colleagues and **service partners**
- e. the types of behaviours that show you have a relationship of respect and honesty with colleagues and **service partners**
- f. how to deal with conflict constructively.

Assessment guidance

Service partners: When **two or more** organisations or departments combine to provide effective customer service. Partners can be eg departments, suppliers.

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 deliver seamless customer service with a team.

*Internal/organisational documentation, 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 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:

- a. the importance of careful planning when introducing change
- b. the types of factors that may help or hinder the process of change and how to identify and plan for these
- c. how to develop plans that contain realistic objectives, tasks and schedules
- d. the importance of having clear lines of responsibility and accountability
- e. how to identify and plan for possible contingencies
- f. the importance of clear communication when changes are taking place
- g. why it is important to win the support of people who will be affected by change
- h. how to win over staff who are resistant to change
- i. the types of support that staff may need when improvements are being implemented and how to provide such support
- j. why it is important to complete change on time and within budget
- k. how to monitor and evaluate the impact of change
- l. 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 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.

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.

Unit 725

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

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.

Unit 810

Show understanding of customer service management (F5)

Level: 8
Credit value: 10

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?

Management responsibilities in a role that is directly related to customer service generally involve a set of skills, knowledge and understanding that might be expected of any manager. However, the nature of customer service means that, if you have specific customer service responsibilities, there is a further skills and knowledge set that you need. This unit covers the key principles of customer service that influence how it is managed and the links between your management responsibilities and those key principles. The unit also recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This unit provides the opportunity to demonstrate the knowledge and understanding that is needed to be effective in customer service management.

Outcomes of effective performance

When you show understanding of customer service management you must consistently:

- 1. Demonstrate understanding of the principles of customer service that influence the way it is managed**
 - a. exercise customer service management responsibility with consideration for your organisation's **service offer**, customer expectations and **resources**
 - b. supervise and develop staff skills in the delivery of customer service
 - c. contribute to the development of customer service policies, culture and ethics in your organisation
 - d. evaluate options for **technology** that will improve customer service delivery
 - e. carry out risk assessment when dealing with customer service problems

- 2. Demonstrate how your management responsibilities link with customer service principles**
 - a. display leadership in a customer service role
 - b. contribute to recruitment and development of staff with appropriate customer service skills
 - c. **monitor and maintain effective customer service** in your organisation
 - d. promote improvement of customer service in your organisation.

Unit 810

Show understanding of customer service management (F5)

Knowledge and understanding

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

- a. the customer service management role and responsibilities in relation to your organisation's **service offer**, customer expectations and customer satisfaction
- b. how effective customer service depends on a combination of organisational systems and the individual skills of those responsible for customer service delivery
- c. how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation
- d. how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality
- e. the options for **monitoring customer service** performance and the benefits and drawbacks of each option
- f. the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors
- g. the key features of a customer service culture in an organisation
- h. how risk assessment can be applied to customer service situations when dealing with customer service problems
- i. options for making use of **technology** to improve customer service delivery
- j. ways in which an organisation can seek continuous improvement in its customer service
- k. ways in which the ethical and values base of an organisation's approach to customer service are demonstrated and maintained
- l. the nature of your responsibilities for customer service resources and systems in your organisation
- m. your leadership role in customer service delivery
- n. the key skills and attributes to be sought when recruiting for a person to deliver customer service in your organisation
- o. options for training, development and/or achievement of qualifications by your organisation's staff in customer service and the benefits and drawbacks of each option
- p. the importance of the steps you take to monitor and maintain effective delivery of customer service in your organisation
- q. ways in which you promote continuous improvement within your organisation
- r. the importance of establishing a strong network of contacts with similar interests in 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.

Resources:

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

Technology

Websites

Email

Data Management and analytics

Social media

Methods to monitor and maintain effective customer service:

Here the candidate will be required to assess the suitability of at least three methods.

Monitoring techniques:

- listening to calls
- reviewing written communication
- getting direct feedback from customers
- use of mystery shoppers
- direct observation of practice
- sales figures
- returns/complaints figures
- achievement of targets, KPIs etc
- staff absences

Evidence may be supplied by:

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

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 customer service operations.

*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 811

Follow organisational rules, external regulations and legislation when managing customer service (F6)

Level: 8
Credit value: 10

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?

Management responsibilities in a role that is directly related to customer service generally involve actions and a set of knowledge and understanding of legislation and regulation that impact on the management function and the way you fulfil it. Regulation of customer service may originate from within an organisation through policies and procedures or may originate from external regulators. Some legislation applies directly to the relationship between service providers and customers. This unit is about observing the law and rules and what you must know and understand in order to manage customer service processes effectively.

Unit 811

Follow organisational rules, external regulations and legislation when managing customer service (F6)

Outcomes of effective performance

When you follow organisational rules, external regulations and legislation when managing customer service, you must consistently:

1 Follow your organisation's rules and culture related to customer service

- 1f. contribute to the development of customer service in your organisation within the organisation's rules and culture
- 1g. act within your own authority to promote customer service in your organisation
- 1h. use appropriate sources of information about organisational rules, policies and procedures that relate to customer service
- 1i. deal with customer service problems and complaints within organisational rules.

2 Follow external regulations and legislation when managing customer service

- 2a. manage customer service activities following external regulation
- 2b. assess the risks resulting from non-compliance with external regulations and legislation when supervising the delivery of customer service
- 2c. contribute to development of customer service policies and procedures that comply with external regulations and legislation.

Knowledge and understanding

To be competent at following organisational rules, external regulations and legislation when managing customer service you must know and understand:

- a. the steps that managers can take to encourage development of a customer service culture in your organisation
- b. the importance of influencing skills for the development of customer service in your organisation
- c. the opportunities provided and constraints placed on customer service delivery by the policies and procedures of your organisation
- d. the structure of authority in your organisation relating to customer service management
- e. the limits of your own authority and who else in the organisation needs to be involved if you cannot authorise customer service management actions alone
- f. how you should involve service partners in customer service management actions
- g. the sources of information about organisational rules, policies and procedures that relate to customer service
- h. your organisation's definition of a complaint and your responsibility in connection with complaints
- i. the structure of legislation and external regulation that impacts on the customer service of your organisation
- j. the importance of the regulatory authority of different legal and regulatory bodies for your organisation
- k. the risks for your organisation presented by non-compliance with different legal and regulatory bodies
- l. the level of knowledge and understanding needed by people in your organisation involved in customer service delivery regarding relevant legislation and external regulation
- m. the importance of taking full account of legal and regulatory requirements when planning customer service developments
- n. the relationship between customer service policy and compliance.

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 **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 followed organisational rules, external regulations and legislation when managing customer service.

*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 812

Plan, organise and control customer service operations (B13)

Level: 8
Credit value: 10

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?

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, you must be able to deal with these problems in a way that leaves your customer with a positive impression of your organisation. This unit is about managing the delivery of services to the customer.

Outcomes of effective performance

When you plan, organise and control customer service operations you must consistently:

1 Plan customer service operations

- 1a. analyse customer expectations and define the **service offer** designed to meet those expectations
- 1b. develop specific plans that will ensure sustainable and consistent delivery of customer service
- 1c. identify any contingencies that may occur, assess their risks and develop effective plans to deal with them
- 1d. plan how you will **monitor and evaluate customer service operations**.

2 Supervise customer service operations

- 2a. negotiate the availability of people and other **resources** that you need to implement your customer service delivery plans
- 2b. develop specific, measurable and realistic targets for the staff who deliver customer service
- 2c. ensure that planned **resources** are available when required
- 2d. brief staff on their objectives and targets
- 2e. encourage feedback from staff and customers and use their feedback to modify objectives and targets
- 2f. collect and analyse feedback from customers and staff on customer service operations
- 2g. evaluate how effectively agreed outcomes and processes are being achieved
- 2h. modify your plans for customer service operations in the light of your evaluation.

3 Deal with problems relating to customer service operations

- 3a. collect information on the nature of the problem and assess the likely impact on the customer
- 3b. identify the causes of the problem and possible solutions
- 3c. evaluate possible solutions against customer expectations and organisational needs
- 3d. select and implement an acceptable solution with the minimum possible disruption to customers
- 3e. monitor the implementation of the solution and, where necessary, make adjustments.

Knowledge and understanding

To be competent at planning, organising and controlling customer service operations you must know and understand:

- a. how to develop plans for customer service operations and what these plans should contain
- b. how to identify and work within allocated budgets and time targets for customer service operations
- c. the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- d. the types of **monitoring methods** you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- e. how to develop objectives and targets for staff
- f. the importance of briefing staff and how to do so effectively
- g. the importance of monitoring the quality of your customer service operations
- h. the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- i. the importance of liaising with customers and colleagues about problems and possible solutions
- j. how to identify and evaluate possible solutions
- k. the different sources of information available, including the internet and social media, and the opportunities they present for monitoring information about customers

Assessment guidance

Service offer:

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

The 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.

Methods to monitor customer service operations

Here the candidate will be required to assess the suitability of **at least three** methods. Monitoring techniques:

- listening to calls
- reviewing written communication
- getting direct feedback from customers
- use of mystery shoppers
- direct observation of practice
- sales figures
- returns/complaints figures
- achievement of targets, KPIs etc
- staff absences

Resources:

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

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- professional discussion
- reflective account
- organisation's operational plans
- customer feedback and records
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

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, organise and control customer service operations.

*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: 8

Credit value: 8

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

What is the unit about?

People managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal. They also need to know what to do to improve customer service to meet and exceed customer expectations. This unit is about planning how you measure standards of customer service by collecting and analysing information. You must develop conclusions and recommendations and then report your findings to relevant people. Most of all, this unit is about approaching the review of customer service quality systematically and making full use of your findings.

Outcomes of effective performance

When you review the quality of customer service you must consistently:

1 Plan how to measure customer service

- 1a. identify the features of customer service delivery that affect customer satisfaction
- 1b. plan how you will monitor the features of customer service delivery that affect customer satisfaction
- 1c. plan how you will analyse the information you have collected.

2 Collect and analyse information on customer service

- 2a. implement your plans for monitoring customer service processes and outcomes
- 2b. analyse the **monitoring information** you have collected
- 2c. compare the conclusions of your analysis with the criteria you identified
- 2d. adapt your plans if the agreed methods of collecting and analysing information are not proving effective
- 2e. communicate the results of your measurement of customer service to colleagues
- 2f. agree actions to improve customer service that result from your measurements and analysis.

Knowledge and understanding

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

- a. the importance of measuring the quality of customer service
- b. how to identify which aspects of the customer service process affect customer satisfaction
- c. how to select the criteria you will use for measurement of customer service
- d. how to construct representative samples
- e. the types of **information collection methods** you could use
- f. how to make use of all available sources of information and feedback about service quality including what is available through social media
- g. methods of analysing information on the quality of customer service
- h. how to identify recommendations that flow from your measurement of customer service.
- i. the procedures for making recommendations on customer service improvements within your organisation.

Assessment guidance

Monitoring information eg

- KPIs
- sales figures
- returns
- complaints
- observations

Information collection systems: eg

- surveys
- focus groups
- informal customer feedback
- observation
- financial records

Sources of information:

Here the candidate will show use of at least **two** sources of information:

- social media
- sales figures and financial records
- returns/complaints figures
- achievement of targets, KPIs etc

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- customer feedback and records
- 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 the quality of 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 814

Build and maintain effective customer relations (B15)

Level: 8
Credit value: 8

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

What is the unit about?

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This unit is about establishing and maintaining effective customer relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success. This unit is only for you if you are in a position to influence the way your organisation determines the level of service offered to different customers.

Outcomes of effective performance

When you build and maintain effective customer relations you must consistently:

1 Establish effective customer relations

- 1a. identify **the types of customers** with whom you should build longer term customer relations and promote loyalty
- 1b. communicate with these customers so that they know they are important to your organisation
- 1c. explain your role, the purpose of making contact and the mutual benefits of building a longer term relationship
- 1d. make it clear that you welcome two-way communication about customer expectations.

2 Maintain and develop effective customer relations

- 2a. keep customers informed and accept criticism from customers openly and constructively
- 2b. regularly assess whether customer expectations are being consistently met
- 2c. use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded
- 2d. collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction
- 2e. analyse customer relations and propose changes that will develop longer term loyalty to people with authority in your organisation.

Knowledge and understanding

To be competent at building and maintaining effective customer relations you must know and understand:

- a. how to identify and prioritise **types of customers** with whom you should be building a longer term relationship
- b. the most appropriate method of establishing relationships with customers targeted for longer term relationships
- c. the importance of effective communication skills when dealing with customers
- d. how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship
- e. how to communicate with customers, especially when they are dissatisfied with products and services
- f. how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
- g. the types of compromises that would be acceptable to your organisation when meeting customer expectations
- h. how to use your influence and authority in your organisation to meet or exceed customer expectations
- i. methods of monitoring customer satisfaction appropriate to your level of authority in the organisation
- j. the part played by internet contact and social media and the potential this offers for building and maintaining effective customer relations.

Assessment guidance

Types of customers:

Customers can be a number of people. They will vary according to the organisation eg shareholders, customers, suppliers, other branches, other departments. They are people who have an interest in the organisation and can be affected by its actions. Not all customers are equal.

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- customer feedback and records
- 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 built and maintained effective customer relations.

*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: 8
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. This unit is about the process of handling complaints. 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?

However effectively customer service is organised, customers make complaints from time to time. In some organisations, it is simply a matter of procedure for all complaints to be handled by particular people. Sometimes, front-line staff or supervisors can deal with these complaints, however, often more senior staff must deal with the complaint. This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level. This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

Outcomes of effective performance

When you handle referred customer complaints you must consistently:

1 Investigate referred customer complaints

- 1a. collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint
- 1b. take personal responsibility for dealing with the complaint subject to the limits of your authority
- 1c. keep your customer informed about what steps are being taken to deal with their complaint
- 1d. follow the correct procedures if your **customer** wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation.

2 Take action to deal with referred customer complaints

- 2a. identify a range of possible solutions that balance customer expectations and your organisation's **service offer**
- 2b. liaise with your customer and colleagues to negotiate an acceptable solution
- 2c. agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
- 2d. implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken.

3 Identify repeated customer complaints and recommend changes to policies and procedures

- 3a. identify patterns and trends in customer complaints
- 3b. analyse trends in customer complaints
- 3c. identify solutions acceptable to your customers that fit your organisation's **service offer**
- 3d. identify possible changes to customer service policies and procedures
- 3e. consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
- 3f. select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers.

Knowledge and understanding

To be competent at handling referred customer complaints you must know and understand:

- a. the importance of minimising **customer** complaints and dealing with them effectively and promptly when they occur
- b. your organisation's complaints procedures and the limits of your authority
- c. the procedures you must follow if a complaint is likely to be escalated or have wider implications
- d. the types of complaints that could have wider implications for your organisation
- e. why it is important to communicate with your customer at all stages of a complaints procedure
- f. how to devise solutions that balance customer expectations and organisational aims
- g. why it is important to identify, and present to the customer, a range of possible options
- h. why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
- i. how to identify trends and patterns in customer complaints and solutions
- j. how to explore the implications of these patterns and trends for your organisation's policies and procedures
- k. how to recommend changes to organisational policies and procedures
- l. the benefits and drawbacks of using different forms of response when complaints have originated through different channels such as social media.

Assessment guidance

Types of customers:

Customers can be a number of people. They will vary according to the organisation eg shareholders, customers, suppliers, other branches, other departments. They are people who have an interest in the organisation and can be affected by its actions. Not all customers are equal.

Evidence may be supplied by:

- witness testimony
- observation
- questioning
- professional discussion
- reflective account
- customer feedback and records
- analysis of information and identified patterns and trends
- 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 handle referred customer complaints.

*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 8		C	N	PS	WWO	ICT
F5	Show understanding of customer service management	6	6	6	6	6
F6	Follow organisational rules, external regulations and legislation when managing customer service	6	6	6	6	6
A17	Champion customer service	6	6	6	6	6
A18	Make customer service environmentally friendly and sustainable	6	6	6	6	6
B12	Maintain and develop a healthy and safe customer service environment	6	6	6	6	6
B13	Plan, organise and control customer service operations	6	6	6	6	6
B14	Review the quality of customer service	6	6	6	6	6
B15	Build and maintain effective customer relations	6	6	6	6	6
B16	Deliver seamless customer service with a team	6	6	6	6	6
C8	Handle referred customer complaints	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; WWO= Working with Others; ICT=Information and Communication Technology

Appendix 2 Sources of general information

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

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

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

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

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for E-volve assessments.

Useful contacts

UK learners

E: learnersupport@cityandguilds.com

General qualification information

International learners

F: +44 (0)20 7294 2413

General qualification information

E: **intcg@cityandguilds.com**

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**

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**

International awards

F: +44 (0)20 7294 2413

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

E: **intops@cityandguilds.com**

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**

Employer

T: +44 (0)121 503 8993

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

E: **business_unit@cityandguilds.com**

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

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