

UNIT 318 (LEVEL 3 UNIT, 7 CREDITS)

MONITOR THE QUALITY OF CUSTOMER SERVICE TRANSACTIONS

Elements in this unit

When you have completed this unit, you will have proved that you:

- 318.1** can prepare to monitor the quality of customer service transactions
- 318.2** can monitor the quality of customer service transactions
- 318.3** can give feedback on the quality of customer service transactions
- 318.4** understand how to monitor the quality of customer service transactions.

You should note

- 1** Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any evidence within this unit.
- 2** You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3** You must provide evidence that shows you have done this over a sufficient period of time, with different customers on different occasions, for your assessor to be confident that you are competent.

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

Assessed evidence

You need to show that you understand and are able to complete all the elements in this unit over a sufficient period of time, with different customers, on different occasions. Evidence may be gained through direct observation or products of work, recorded by your assessor and then referenced in the box below. On the next pages, these evidence references can be written in the relevant boxes of 'What you must cover', 'What you must do' and 'What you must know'.

Evidence reference	Evidence title	Assessment method

Assessment method key

O Observation **Q** Questioning **PE** Product Evidence
WT Witness Testimony **PD** Professional Discussion

UNIT 318 (LEVEL 3 UNIT, 7 CREDITS)

MONITOR THE QUALITY OF CUSTOMER SERVICE TRANSACTIONS

What you must do

Evidence reference should be entered in the shaded areas below. You must do **all** the points listed.

318.1 To prepare to monitor the quality of customer service transactions, you must:

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

318.1.2 agree a sampling frame for monitoring customer service transactions

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

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

318.1.5 ensure that you are totally familiar with the customer service procedures for transactions you are monitoring.

318.2 To monitor the quality of customer service transactions, you must:

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

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

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

318.2.4 record your observations of a colleague's performance against agreed quality criteria

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

318.2.6 analyse and summarise your observations to identify patterns and trends in their colleague's performance.

318.3 To give feedback on the quality of customer service transactions, you must:

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

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

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

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

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

What you must know

Evidence reference should be entered in the shaded areas below. You must know **all** the points listed.

318.4 To understand how to monitor the quality of customer service transactions, you must be able to:

318.4.1 review the criteria against which the quality of customer service delivery is judged in your organisation

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

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

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

318.4.5 explain your organisation's procedures and guidelines for customer service delivery

318.4.6 describe ways to record details of customer service transactions you have observed in order to provide feedback

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

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

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

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

Unit sign-off

The evidence for this unit is valid, sufficient and an authentic record of the candidate's current competence and has been assessed under the requirements of the assessment strategy.

I confirm that the evidence provided is a result of my own work.

Signature of candidate	Date
------------------------	------

I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor	Date
-----------------------	------

Countersignature of assessor	Date
------------------------------	------

Signature of IV (if sampled)	Date
------------------------------	------

Countersignature of IV	Date
------------------------	------

Signature of EV (if sampled)	Date
------------------------------	------