LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE
Candidate Logbook

Updated for the QCF
'Our customers are our biggest fans and yet our biggest critics. They tell us every week whether we’re delivering on our promise and what we need to do if we’re not.

Customer service is about building fantastic rapport with your customers to get repeat business – again and again. As you undertake this course, you’ll discover that great service is full of opportunity rather than restrictions.’

Jo Moran
*Head of Service at Marks & Spencer*
LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

Candidate Logbook

Name

City & Guilds enrolment number

Date registered with City & Guilds

Date enrolled with centre

Centre name

Centre number

Centre address

Centre contact

Assessor name

Internal Verifier (IV) name
City & Guilds would like to sincerely thank the following:

Cover photography
David Woolfall

Illustrations
Eleanor Grosch at AgencyRush.com

Pictures
p.4 Caroline Green; p.5 Linda Orr, Sylvia Sims, Fran Ludford, Jackie Webster, Chris McMahon, Chantel Gertenbach; p.7 Redactive; p.13 Ed Miller; Unit 101 Jamie Baker; Unit 201 Nick Dawe; Unit 203 ColourBlind Images / Getty; Unit 204 Nick Dawe; Unit 205 SJ Locke/istockphoto; Unit 209 David Woolfall; Unit 210 Radius Images/Alamy; Unit 212 Ed Miller; Unit 214 Nick Dawe; Unit 105 Louis Quali; Unit 106 Mark Harrison; Unit 219 Nick Dawe; Unit 221 Brand X Pictures/ Photolibrary; Unit 223 Photolibrary.

About City & Guilds
City & Guilds is the UK’s leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8,500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

City & Guilds Group
The City & Guilds Group includes the Institute of Leadership & Management (ILM), providing management qualifications, learning materials and membership services, and the National Proficiency Tests Council (NPTC), which offers land-based qualifications. City & Guilds also manages the Engineering Council Examinations on behalf of the Engineering Council.

Equal opportunities
City & Guilds fully supports the principle of equal opportunities and we are committed to satisfying this principle in all our activities and published material. A copy of our equal opportunities policy statement is available on the City & Guilds website, www.cityandguilds.com.

Copyright
The content of this document is, unless otherwise indicated, © The City and Guilds of London Institute 2010 and may not be copied, reproduced or distributed without prior written consent.
ISBN 978 0 85193 186 9
First edition 2010
Reprinted 2010, 2012
Please note: National Occupational Standards are not © The City and Guilds of London Institute. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

Production
The Customer Service Level 2 Logbook cover, book design and implementation by:
August Media Limited
Zetland House
Scrutton Street
London EC2A 4HJ
T +44 (0) 20 7749 3300
www.augustmedia.com

Revised edition design implemented by:
Julie Francis
T +44(0) 1279 600214 email: j.f.design@btinternet.com

Publications
For information about, or to order City & Guilds’ support materials, contact Customer Relations on +44 (0)844 543 0000 or centresupport@cityandguilds.com. You can find more information about the materials we have available at www.cityandguilds.com/publications.

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds’ products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.
# CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>4</td>
</tr>
<tr>
<td>Meet the contributors</td>
<td>5</td>
</tr>
<tr>
<td>Getting started</td>
<td>6</td>
</tr>
<tr>
<td>Customer service in action</td>
<td>8</td>
</tr>
<tr>
<td>How the NVQ Certificate works</td>
<td>9</td>
</tr>
<tr>
<td>Skill scan/initial assessment form</td>
<td>15</td>
</tr>
<tr>
<td>Witness status list</td>
<td>19</td>
</tr>
<tr>
<td>Summary of unit achievement</td>
<td>21</td>
</tr>
<tr>
<td>Filling out the units</td>
<td>24</td>
</tr>
<tr>
<td>Further information</td>
<td>26</td>
</tr>
</tbody>
</table>

## MANDATORY UNITS

### Customer Service Foundations

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Communicate using customer service language</td>
<td>27</td>
</tr>
<tr>
<td>201</td>
<td>Follow the rules to deliver customer service</td>
<td>33</td>
</tr>
</tbody>
</table>

## OPTIONAL UNITS

### Impression and Image

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>203</td>
<td>Give customers a positive impression of yourself and your organisation</td>
<td>39</td>
</tr>
<tr>
<td>204</td>
<td>Promote additional services or products to customers</td>
<td>45</td>
</tr>
<tr>
<td>205</td>
<td>Process information about customers</td>
<td>51</td>
</tr>
<tr>
<td>209</td>
<td>Deal with customers face to face</td>
<td>57</td>
</tr>
<tr>
<td>210</td>
<td>Deal with incoming telephone calls from customers</td>
<td>63</td>
</tr>
</tbody>
</table>

### Delivery

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>212</td>
<td>Deliver reliable customer service</td>
<td>71</td>
</tr>
<tr>
<td>214</td>
<td>Recognise diversity when delivering customer service</td>
<td>77</td>
</tr>
</tbody>
</table>

### Handling Problems

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>105</td>
<td>Recognise and deal with customer queries, requests and problems</td>
<td>83</td>
</tr>
<tr>
<td>106</td>
<td>Take details of customer service problems</td>
<td>89</td>
</tr>
<tr>
<td>219</td>
<td>Resolve customer service problems</td>
<td>95</td>
</tr>
</tbody>
</table>

### Development and Improvement

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>221</td>
<td>Develop customer relationships</td>
<td>101</td>
</tr>
<tr>
<td>223</td>
<td>Develop personal performance through delivering customer service</td>
<td>107</td>
</tr>
</tbody>
</table>

## FURTHER OPTIONAL UNITS

For a full list of optional units, see pages 10–11. All other units are available to download at: www.cityandguilds.com/logbookoptionalunits

If your centre subscribes to SmartScreen, you can also download the optional units from the SmartScreen website at: www.smartscreen.co.uk

SmartScreen.co.uk is the City & Guilds online support site, offering a range of materials for learners and tutors. Ask your tutor if your centre has a subscription, which will enable you to access extra resources and support materials.
If you are looking for a rewarding job, customer service is a great place to be in any company. Most people think that heading up the complaints department of an airline carrying 50 million passengers would be their idea of hell. But customer service is so much more than answering complaints; it is a unique opportunity to improve and adapt your product to ensure it meets current and future customer needs. Companies that view complaints as a negative issue that just has to be dealt with will ultimately lag behind in meeting customer needs.

Complaint handling is a strategic tool that provides companies with the most cost-effective method of identifying redundant or ineffective processes, and adapting their product to keep up with evolving customer requirements. Many companies spend thousands of pounds persuading customers to answer market research surveys when there is already a wealth of information on trends and customer perceptions coming in free of charge. In a highly competitive business environment, those that do not listen to their customers will end up bypassed by those who provide the product that customers want.

At Ryanair, the drive comes from the top of the company to reduce the cost of doing business and this has created a company culture where everyone looks for smarter, cheaper and more efficient ways of performing business processes. This team approach means that there is less internal resistance to change, and new processes can be implemented or removed quickly in response to customer feedback.

All members of the Ryanair customer service team know that they can make suggestions for a product or policy change in any department, based on feedback from customers. There are no barriers or departmental boundaries in the company and if an idea has merit it will be adopted very quickly due to the flat management structure and lack of bureaucracy.

As an example, our customer feedback told us that our customers wanted more low-cost fares available, regardless of the day of travel; they also wanted to avoid queues at the airport and to be in control of their own travel booking process. We responded to this by making cost savings and passing these on to the customer, and by enabling direct sales on our website.

A vital part of being an effective member of any customer service team is full product knowledge and an understanding of the systems that allow the product to be delivered. Without this information it is difficult for you to understand how customer problems occur or to be able to identify new innovative solutions. Accumulating this knowledge is vital to your success in addition to having a business qualification that gives you a sound framework of key business principles and best practices to fall back on.

I wish you every luck in this qualification and your customer service journey.
City & Guilds would like to thank all the contributors who have added their words of wisdom and experience to your logbook. Now you get to benefit from their experience by reading their hints and tips that you’ll find in all the units as you work through your qualification.

**LINDA ORR**  
**CITY & GUILDS STRATEGIC ADVISOR AND EXTERNAL VERIFIER**  
Based in Scotland, Linda Orr is a City & Guilds Strategic Advisor and an External Verifier for Customer Service, Contact Centre, Sales and Business and Administration. She previously worked in retail management in Mothercare and set up her own training business. Linda is an Honorary Member of City & Guilds and is the author of this logbook.

**SYLVIA SIMS**  
**MANAGEMENT MEMBER OF THE INSTITUTE OF CUSTOMER SERVICE**  
After working at a utility company training people in IT, Sylvia Sims decided to pass on her knowledge and skills and studied to become a lecturer. Sylvia worked with City & Guilds on the introduction of the Customer Service NVQ standards and for the past 12 years has worked with centres, assessors, Internal Verifiers, Quality Assurance Coordinators and candidates. Sylvia is the consultant for this logbook.

**FRAN LUDFORD**  
**LEADER FOR BUSINESS AND RETAIL NVQs AT SUSSEX DOWNS COLLEGE**  
Fran Ludford’s career in training and NVQs began in 1997 when she joined a private training company, following 12 years within the retail sector. ‘It was then that I began to work closely with City & Guilds, contributing to the writing of new standards within Administration and Customer Service,’ says Fran. ‘Since 2007, I have been working with Sussex Downs College, maintaining customer service and practice.’

**JACKIE WEBSTER**  
**ACCREDITATION MANAGER AT VT GROUP – TRAINING**  
Jackie Webster has worked in the service industry for many years and been working with NVQs for over 10 years, achieving her own Level 3 qualification in Customer Service. ‘When you’re working in the service industry, it’s important that customer expectations are fulfilled,’ she says. ‘By working with people to gain qualifications in customer service it ensures that all customer experiences are fulfilled.’

**CHRIS McMAHON**  
**DIRECTOR OF TRAINING AND DEVELOPMENT AT YH TRAINING SERVICES**  
Chris McMahon has been working within the training environment in colleges and independent providers since 1986. She has worked in delivery and quality roles through a variety of changes. Chris started in 1986 as a trainer/assessor, progressing to the Director of Training and Development for YH Training Services in 1999. She is responsible for the company’s quality of delivery, internal verification and accreditation, working with City & Guilds throughout her training career.

**CHANTEL GERTENBACH**  
**ASSessor and Verifier, North London, with Hit Training**  
Chantel Gertenbach is an Assessor and Verifier, North London, with Hit Training. She has worked in both front and back of house management positions within hospitality for 15 years in South Africa, Dubai and England. ‘I am proactive, ambitious and believe in strong customer service,’ says Chantel. ‘I live up to the customer service promise by listening and acknowledging customer needs. This creates mutual respect and allows your customers to influence and develop your organisation into one of excellence.’
Welcome to your City & Guilds Candidate Logbook. You are about to start a programme of assessment in your centre or workplace leading to the Customer Service NVQ Certificate. This candidate logbook has been produced to provide you with information and support as you work through achieving your qualification. As you progress, you will be able to demonstrate that you have the necessary practical skills and the knowledge and competence to do your work effectively and efficiently.

This logbook is designed to help you work towards your Level 2 NVQ Certificate in Customer Service by:
• showing you what you need to achieve
• helping you to record your achievements and evidence.

In this logbook, you will find some of the forms that you and your assessor will use for your NVQ Certificate. Other forms will be provided by your assessor.

You’ll also find helpful images, hints, tips and more – all designed to make the qualification simple to understand and more fun to do. We’re sure that you will have lots of questions about your qualification, and this introduction should answer some of them. Of course, your assessor should also be on hand to be your guide, but here are the answers to questions you may have now. Good luck!

WHAT QUALIFICATION AM I DOING?
The Level 2 NVQ (National Vocational Qualification) Certificate in Customer Service. ‘Vocational’ means that the work you do to achieve this qualification is mainly about customer service skills and real work activities. This qualification aims to increase the skills of people, like you, working in a wide range of industries. Developing the skills of each individual, wherever they work, and whatever they do, meets a basic need for personal growth.

DO I HAVE TO COMPLETE EACH UNIT BEFORE I MOVE ON TO THE NEXT ONE?
No, while this NVQ Certificate is structured around 49 units, which ones you choose to do, and in which order, should be built around your job. As you are going about your everyday work or course activities, you may be covering sections that occur in more than one unit. For example, you might learn about a new product from your organisation. This activity comes under unit 204 ‘Promote additional services or products to customers’. However, by demonstrating that you understand that customers who previously bought a similar product might be interested in the new one, you could have carried out an activity that can be used in other units, such as:
101 Communicate using customer service language
203 Give customers a positive impression of yourself and your organisation
205 Process information about customers
207 Make customer service personal

Your assessor will help you to work out which parts of which units you are covering while you complete your regular work or course activities.
There are two organisations involved in creating your NVQ Certificate:

1 **The Sector Skills Body (SSB)**
The Sector Skills Body works with employers to decide the skills and knowledge needed at Level 2. They then write the ‘standards’ to describe all the things that you must be able to do, and these are what your NVQ Certificate has been based on.

2 **City & Guilds**
City & Guilds uses the Customer Service standards in order to create the Customer Service Level 2 NVQ Certificate. It states the assessment methods that must be followed in order for candidates to achieve their qualification.

In an NVQ, you are either ‘competent’ or ‘not competent’. This means that if you have not quite got everything right when you do something, you will have a chance to do it again after more practice – remember, practice makes perfect! There are a number of people who will help you decide when you are competent:

1 **Your assessor**
A person within your centre or workplace who is very experienced in the area of work for which you are training. This may be your manager, supervisor or tutor. Your assessor will be overseeing your work towards the qualification on a day-to-day basis.

2 **Internal Verifier (IV)**
A person within your centre or workplace who checks that all the assessments made by the assessors are carried out to the correct standards.

3 **External Verifier (EV)**
Someone from City & Guilds who visits your centre or workplace to check that all the assessments are correct and are up to the same standard as those made in other centres. This ensures that you are not working to a higher or lower level than candidates in other centres. External Verifiers also check that your centre is operating the qualification properly and fairly and has all the systems and equipment in place for your NVQ Certificate.

---

**Why customer service matters to... a dressmaker**
A dressmaker makes custom clothing for women, such as dresses, blouses and evening gowns. As well as having skills in needlecraft and design, a dressmaker needs to properly understand what a customer wants in order to create an item of clothing that fulfils their expectations.

---

**WHO DECIDES WHAT I NEED TO ACHIEVE?**

There are two organisations involved in creating your NVQ Certificate:

1 **The Sector Skills Body (SSB)**
The Sector Skills Body works with employers to decide the skills and knowledge needed at Level 2. They then write the ‘standards’ to describe all the things that you must be able to do, and these are what your NVQ Certificate has been based on.

2 **City & Guilds**
City & Guilds uses the Customer Service standards in order to create the Customer Service Level 2 NVQ Certificate. It states the assessment methods that must be followed in order for candidates to achieve their qualification.

**WHO WILL DECIDE WHETHER I HAVE ACHIEVED THE STANDARDS?**

In an NVQ, you are either ‘competent’ or ‘not competent’. This means that if you have not quite got everything right when you do something, you will have a chance to do it again after more practice – remember, practice makes perfect! There are a number of people who will help you decide when you are competent:

1 **Your assessor**
A person within your centre or workplace who is very experienced in the area of work for which you are training. This may be your manager, supervisor or tutor. Your assessor will be overseeing your work towards the qualification on a day-to-day basis.

2 **Internal Verifier (IV)**
A person within your centre or workplace who checks that all the assessments made by the assessors are carried out to the correct standards.

3 **External Verifier (EV)**
Someone from City & Guilds who visits your centre or workplace to check that all the assessments are correct and are up to the same standard as those made in other centres. This ensures that you are not working to a higher or lower level than candidates in other centres. External Verifiers also check that your centre is operating the qualification properly and fairly and has all the systems and equipment in place for your NVQ Certificate.
From the front office through to the back of the warehouse, customer service is everywhere in the 21st century. Since you are taking this qualification, you obviously understand the value of offering good customer service. But what other types of roles require these skills and knowledge? And what happens to people after they’ve taken the time to study and learn about customer service? Find out how three professionals have applied the qualification in their job by reading about three former City & Guilds candidates.

**Lee Slater**

**Administrator**

‘When my company gave me the opportunity to undertake an NVQ in Customer Service, I jumped at the opportunity, as I wanted to progress my knowledge and add a qualification to my CV. My tutor was friendly and kind – throughout the year of my course she provided me with 100 per cent guidance and support. I enjoyed the tasks provided by my tutor and my learning skills improved, because for some of the tasks I had to look on the internet for information.

‘During my learning, I gained a wealth of knowledge in providing good customer service. It has helped me to understand more about employment regulations, health and safety and how to provide great customer service to our clients. I have enjoyed every second of my learning. After completing a task, I always had a great sense of achievement.’

**Verity Guppy**

**Senior Supervisor**

‘I wanted to do the Level 2 NVQ in Customer Service as I saw it as a good opportunity to learn and gain more experience. There was also the added incentive that it was government funded and that I could complete this course within working hours. From doing the course, I gained increased confidence, especially when dealing with customer complaints.

‘After I completed my Level 2, my NVQ officer asked me if I would be interested in doing Level 3. During my Level 2, I had been promoted to Branch Supervisor, so I jumped at the chance to gain further experience to help me in this new role. I am glad that I took the opportunity to complete Level 3, as this has helped me to develop into the manager that I am today. It has helped me to become more aware of my customers’ needs and to develop my people skills when dealing with awkward customers.’

**Heather Gamble**

**Vocational Coach**

‘While working in retail as a supervisor, I was offered the choice of signing up to an NVQ in Customer Service. I liked the look of the course as I thought it would apply to many job roles. Within a year of being on the programme, I was promoted to Assistant Manager. While on the course, I gained a lot of confidence as I was learning about how to deal with customers in different situations and I found learning about all the legislation very interesting.

‘Before completing my NVQ, I had been taking on more responsibility in my store and was being trained to become a store manager. I enjoyed my NVQ so much, I applied for a position as a vocational coach and I believe that having this qualification has enabled me to develop at a faster pace. I would recommend it to anyone looking to develop their skills, not just in retail, but in any business.’
This qualification is made up of a number of different units, each of which has a credit value. Each unit describes the standards of a broad area of work that a competent person should be able to perform. There is a unit summary that describes what the unit is about and clarifies key words and phrases.

The qualification is broken down into elements of the National Occupational Standards (NOS) using learning outcomes and assessment criteria. These show what needs to be done to achieve the whole unit.

The NOS will include information about:
- the standards of performance expected
- the types of evidence you will need to produce
- the knowledge required.

Once you have achieved all the requirements of the unit, you will have achieved and banked that unit's credit towards your qualification. Each credit indicates 10 hours of learning time, so you can easily see how long the unit and qualification will take you. The qualification you are working towards is the City & Guilds Level 2 NVQ Certificate in Customer Service, and the minimum value you must achieve is 28 credits. This means that the qualification could take you approximately 280 hours of learning to complete.

There are two types of unit in this qualification:
- **Mandatory units**
  You will have to achieve all these in order to achieve the qualification overall.
- **Optional units**
  You will be able to choose from a range of optional units taken from different themes.

To gain your City & Guilds certificate you will be expected to show competence in the mandatory and the chosen optional units and, when you have successfully completed the relevant units, you will be able to claim your qualification from City & Guilds. Even if you only complete some of the chosen units, you will still be able to claim unit certification. Your assessor will be able to tell you exactly what you have achieved if you're unsure.

Once you have completed your Level 2, you may want to progress to another qualification in this area. Talk to your assessor about whether you can count any of your achieved units towards a higher level or size of qualification.

**WHAT'S IN A UNIT?**
There are four main parts in each unit. These are briefly explained below:

**You should note**
Any points under this heading should be remembered when you're putting together your evidence for that unit. For example, in all the units you need to make sure that evidence is collected when carrying out a real job or in a realistic working environment. In unit 210, for example, you should note that you will provide evidence of dealing with customers using landline telephones, mobile telephones, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

**What you must cover**
This is the range of evidence you must have experienced when completing the unit. For example, in unit 210, your evidence must include examples of dealing with customers that are both planned and unplanned.

**What you must do**
These are the general tasks that you need to complete successfully in order to achieve the unit. For example, in unit 210, you must operate the telecommunication equipment efficiently and effectively.

**What you must know**
This is what you must understand in order to complete the unit successfully. For example, in unit 210, you must be able to describe your organisation's guidelines and procedures for the use of telecommunication equipment.
To complete the Level 2 NVQ Certificate in Customer Service, you must achieve:

- a minimum credit value of 28
- a minimum of 15 credits must be at Level 2
- 8 credits by doing the two mandatory units
- a further 20 credits by completing a minimum of one unit from each Optional Group.

The themes of the unit groups take you on a customer service journey. It starts with understanding your own organisation and moves on to how to create a good impression. Next, you will cover how to deliver effective service to customers. You then look at how to deal with customer complaints and finally at how to improve your customer service. Below is a guide to the units and how they fit into the themes.

### 1: CUSTOMER SERVICE FOUNDATIONS

This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you have to work.

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>CREDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>4 credits</td>
</tr>
<tr>
<td>201</td>
<td>4 credits</td>
</tr>
</tbody>
</table>

### 2: IMPRESSION AND IMAGE

This theme covers the customer service behaviours and processes that have the most influence on the way your customer sees you and your organisation.

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>CREDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>102</td>
<td>5 credits</td>
</tr>
<tr>
<td>103</td>
<td>5 credits</td>
</tr>
<tr>
<td>202</td>
<td>5 credits</td>
</tr>
<tr>
<td>203</td>
<td>5 credits</td>
</tr>
<tr>
<td>204</td>
<td>6 credits</td>
</tr>
<tr>
<td>205</td>
<td>5 credits</td>
</tr>
<tr>
<td>206</td>
<td>6 credits</td>
</tr>
<tr>
<td>207</td>
<td>6 credits</td>
</tr>
<tr>
<td>208</td>
<td>6 credits</td>
</tr>
<tr>
<td>209</td>
<td>5 credits</td>
</tr>
<tr>
<td>210</td>
<td>5 credits</td>
</tr>
<tr>
<td>211</td>
<td>6 credits</td>
</tr>
<tr>
<td>303</td>
<td>6 credits</td>
</tr>
<tr>
<td>304</td>
<td>8 credits</td>
</tr>
<tr>
<td>305</td>
<td>7 credits</td>
</tr>
<tr>
<td>306</td>
<td>7 credits</td>
</tr>
</tbody>
</table>
3: **DELIVERY**
This theme covers customer service behaviours and processes that have the most effect on the customer experience during customer service delivery.

| 104 | Do your job in a customer-friendly way | 1 | 5 credits |
| 212 | Deliver reliable customer service | 2 | 5 credits |
| 213 | Deliver customer service on your customer's premises | 2 | 5 credits |
| 214 | Recognise diversity when delivering customer service | 2 | 5 credits |
| 215 | Deal with customers across a language divide | 2 | 8 credits |
| 216 | Use questioning techniques when delivering customer service | 2 | 4 credits |
| 217 | Deal with customers using bespoke software | 2 | 5 credits |
| 218 | Maintain customer service through effective handover | 2 | 4 credits |
| 307 | Deliver customer service using service partnerships | 3 | 6 credits |
| 308 | Organise the delivery of reliable customer service | 3 | 6 credits |
| 309 | Improve the customer relationship | 3 | 7 credits |

4: **HANDLING PROBLEMS**
This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

| 105 | Recognise and deal with customer queries, requests and problems | 1 | 5 credits |
| 106 | Take details of customer service problems | 1 | 4 credits |
| 219 | Resolve customer service problems | 2 | 6 credits |
| 220 | Deliver customer service to difficult customers | 2 | 6 credits |
| 310 | Monitor and solve customer service problems | 3 | 6 credits |
| 311 | Apply risk assessment to customer service | 3 | 10 credits |
| 312 | Process customer service complaints | 3 | 6 credits |

5: **DEVELOPMENT AND IMPROVEMENT**
This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

| 221 | Develop customer relationships | 2 | 6 credits |
| 222 | Support customer service improvements | 2 | 5 credits |
| 223 | Develop personal performance through delivering customer service | 2 | 6 credits |
| 224 | Support customers using online customer services | 2 | 5 credits |
| 225 | Buddy a colleague to develop their customer service skills | 2 | 5 credits |
| 226 | Develop your own customer service skills through self-study | 2 | 6 credits |
| 313 | Work with others to improve customer service | 3 | 8 credits |
| 314 | Promote continuous improvement | 3 | 7 credits |
| 315 | Develop your own and others' customer service skills | 3 | 8 credits |
| 316 | Lead a team to improve customer service | 3 | 7 credits |
| 317 | Gather, analyse and interpret customer feedback | 3 | 10 credits |
| 318 | Monitor the quality of customer service transactions | 3 | 7 credits |
HOW THE NVQ CERTIFICATE WORKS

USEFUL WORDS

WHAT DO THESE WORDS MEAN?
Here are some words that you may hear over the course of doing your NVQ Certificate.

ASSESSMENT CRITERIA
The task you need to successfully achieve.

ASSESSMENT PLAN
An action plan set by you and your assessor at the beginning of your course, which then updates as you progress through your assessments. It shows which optional units you have chosen and in which order you are going to work towards all the units. It has key dates for collecting evidence for the units and for reviewing your progress, and explains who will assess you, what type of assessment will be used and when and where the assessments will take place.

ASSESSOR
A person qualified and experienced in customer service who will help plan your work and assessments and organise your evidence. Your assessor will be responsible for judging if you are competent and will give you feedback.

AWARDING ORGANISATION
An approved organisation that issues certificates that are recognised by places of education and employers. For Level 2 Customer Service, your awarding organisation is City & Guilds.

CANDIDATE
A person working towards a qualification, i.e. yourself.

CANDIDATE APPEALS PROCEDURE
A system within a centre designed to help you have your evidence checked again if you disagree with the outcome of an assessment. Your centre will explain this procedure to you when you start. You may also find out at any time by asking your assessor or Internal Verifier.

CENTRE
A place where training and/or assessment towards qualifications is carried out, which may be a college, training centre or workplace. Only approved centres that meet strict standards can offer City & Guilds qualifications.

CITY & GUILDS
An awarding organisation for customer service and many other qualifications. City & Guilds checks and approves centres, sets and monitors assessment and issues certificates to candidates. Almost 19,000 candidates were working towards their Level 2 NVQ in Customer Service in 2009.

COMPETENT
This means being able to do your work well. You are competent in an NVQ when you show that you can work consistently to the required standards in a real work situation and that you know and understand the correct way to do your job.

EVIDENCE
This is proof of your competence. In an NVQ, such as Level 2 Customer Service, you need to collect evidence to show you are competent at your work. There are different types of evidence, ranging from your assessor observing your work to a photograph documenting your work (see Product Evidence).

EXTERNAL VERIFIER (EV)
An expert from City & Guilds who visits centres to check that all assessments are carried out correctly and to the same National Occupational Standards. They also check that your centre is operating the qualification properly and fairly.

INTERNAL VERIFIER (IV)
A person within your centre who makes sure that all assessments are carried out correctly and to the same National Occupational Standards.

NATIONAL OCCUPATIONAL STANDARDS
These describe what a candidate must do consistently in a work situation as well as what they must understand to do their job competently. The Institute of Customer Service set the standards for these customer service qualifications.

NVQ
National Vocational Qualifications. These are based on real work activities. To gain an NVQ, you must show that you have the skills and knowledge to do your job effectively by meeting the National Occupational Standards.
Observation is one of the main types of evidence in this NVQ Certificate. Your assessor will watch you work and judge whether you consistently meet the national standards. They will then give you feedback and an updated assessment plan.

Portfolio
This is where you keep all the evidence you collect to show that you are competent. Usually, this is a binder where you can put the sheets of this logbook. Your portfolio needs to be clearly organised and contain all your evidence referenced to the units.

Product Evidence
These are actual outputs of your performance in the workplace that provide evidence of competence. Work products may include reports, specifications, contract documentation and general communication, such as letters, emails, memos or minutes of meetings.

QCF
The Qualifications and Credit Framework is the new government framework that sets out how all qualifications should be structured and titled. It recognises achievement through the award of credit for completion of units building to full qualifications. Each qualification has a name that tells you its difficulty – from entry level to the highest level 8 – and its size – how many credits you need to achieve. An Award is a qualification of up to 12 credits. A Certificate is between 13 and 36 credits. A Diploma needs 37 or more credits. Further information about the QCF can be found at www.cityandguilds.com/qcf

Units (Mandatory and Optional)
The main building blocks of your qualification; each unit describes one aspect of your work. In this Level 2 NVQ Certificate, two units are mandatory, which means you must achieve them. You must also gain 20 more credits from a list of optional units.

Vocational
An NVQ is a vocational qualification because it is based on skills and knowledge that you need in order to work and build a career in customer service.

Witness Statement
A witness is someone who testifies that something happened and comments on it. For some units, a witness statement can be used as evidence. A witness may be a customer, a colleague, a manager other than your assessor, or someone else qualified to testify about your work. Your assessor will tell you when and how a witness statement may be used.
HOW THE NVQ CERTIFICATE WORKS
WHAT STEPS WILL I NEED TO TAKE TO COMPLETE MY QUALIFICATION?

STEP 1 – PLANNING
Your assessor will tell you about the mandatory units that you’re going to be doing and will help you choose the right optional units. Your assessor will want to find out what experience you already have, because it may count towards your qualification. At the end of this discussion, you should have an ‘assessment plan’, which sets out how you will go about achieving this qualification.

STEP 2 – PRODUCING EVIDENCE
You will produce your ‘evidence’. You will find out much more about this as you go along, but evidence for an NVQ Certificate can consist of:
- being observed working by your assessor
- being asked questions by your assessor
- completing assignments
- keeping documents, e.g. work logs.
You will keep all your evidence in a portfolio.

STEP 3 – FEEDBACK
You will regularly be given feedback by your assessor and further training will be suggested if you need it. If your assessor tells you that you are competent after an assessment, it will be recorded on the forms in your logbook. You should keep track of how much you have achieved and what you still have to achieve, but don’t worry as you will discuss your progress with your assessor regularly. You can also use the ‘Summary of unit achievement’ form on page 21 to help you.

STEP 4 – ACHIEVEMENT
When you have completed your units and your assessor is sure that you have the evidence you need, your centre will apply to City & Guilds for your certificate. At this stage you could let your employer know you are now finished and ask if they would be willing to sign that you have ‘personally completed the work as part of regular duties in the workplace’ (see page 23). You will receive the full NVQ Certificate only if you have completed all the required units, otherwise you will receive a certificate listing the units that you have completed successfully.

HOW LONG WILL IT TAKE?
There is no time limit set by City & Guilds for you to complete your qualification but your centre may have some requirements that they will explain to you. Many candidates complete the Level 2 NVQ Certificate within 6–12 months.

WHERE DO I GO IF I NEED MORE INFORMATION ABOUT MY ASSESSMENTS AND QUALIFICATION?
- Your assessor is the most important source of information about your qualification.
- On very rare occasions, if you disagree with an assessor’s decision, you should use your centre’s appeals procedure. Ask an assessor or your Internal Verifier (IV) to help you if you are unsure about how to do this. Your centre will refer any unresolved problems to City & Guilds.
- Your centre’s website. Make a note of the address here:

  - The City & Guilds website: www.cityandguilds.com or City & Guilds Customer Relations on: +44 (0)844 543 0033.
  - The CFA (Council for Administration) website: www.cfa.uk.com
SKILL SCAN/INITIAL ASSESSMENT FORM
LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

COMPLETING YOUR SKILL SCAN/INITIAL ASSESSMENT
Included here is a skill scan/initial assessment form. To ensure that this is the right qualification and at the right level for you, complete the boxes below to show how much responsibility you have or will have within the following areas, and write your longer answers on a separate sheet of paper. To achieve this qualification, you must be able to complete both the two mandatory units and at least one optional unit from each theme, following the rules of combination set out on page 10. Further forms may be provided by your assessor, which may be used to plan and record your progress. Your assessor will give you guidance on how and when these may be completed.

Key: 1 Little or no responsibility  2 Considerable amount of responsibility  3 Total responsibility

MANDATORY UNITS
1: CUSTOMER SERVICE FOUNDATIONS

<table>
<thead>
<tr>
<th>101</th>
<th>Communicate using customer service language</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give a brief explanation of your customer service role and how you prepare yourself so that you can deliver customer service effectively.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>201</th>
<th>Follow the rules to deliver customer service</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give a brief explanation of your organisation's policies and procedures and your responsibilities, giving examples of when you need to refer to others for assistance.</td>
</tr>
</tbody>
</table>

OPTIONAL UNITS
2: IMPRESSIONS AND IMAGE
(Choose at least one of these units, which you feel is relevant to your role.)

<table>
<thead>
<tr>
<th>102</th>
<th>Maintain a positive and customer-friendly attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe how you show a positive attitude to customers by establishing a rapport.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>103</th>
<th>Adapt your behaviour to give a good customer service impression</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe how you relate to your customers and colleagues, adapting your behaviour to ensure you give a good customer service impression.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>202</th>
<th>Communicate effectively with customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give an example of when you communicate with your customers, show you listen and explain what you can and cannot do, remaining professional at all times.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>203</th>
<th>Give customers a positive impression of yourself and your organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give an example of an activity you are involved in which could demonstrate how you meet, greet and treat your customers following organisation guidelines.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>204</th>
<th>Promote additional services or products to customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe how you keep up with new developments in products and services, giving an example of how you identify those that may be of interest to customers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>205</th>
<th>Process information about customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give examples of collecting information on new customers and updating information on existing customers, selecting information within organisational procedures.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>206</th>
<th>Live up to the customer service promise</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe the organisation's service offer, vision and promise, and your role in their application.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>207</th>
<th>Make customer service personal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe situations in which you can make customers feel treated as individuals.</td>
</tr>
</tbody>
</table>

Continues on next page
### Level 2 NVQ Certificate in Customer Service

#### Skill Scan/Initial Assessment Form

**Key:** 1 Little or no responsibility  2 Considerable amount of responsibility  3 Total responsibility

<table>
<thead>
<tr>
<th>Unit</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>208</td>
<td>Go the extra mile in customer service</td>
<td>3</td>
</tr>
<tr>
<td>209</td>
<td>Deal with customers face to face</td>
<td>3</td>
</tr>
<tr>
<td>210</td>
<td>Deal with incoming telephone calls from customers</td>
<td>3</td>
</tr>
<tr>
<td>211</td>
<td>Make telephone calls to customers</td>
<td>3</td>
</tr>
<tr>
<td>303</td>
<td>Deal with customers in writing or electronically</td>
<td>3</td>
</tr>
<tr>
<td>304</td>
<td>Use customer service as a competitive tool</td>
<td>3</td>
</tr>
<tr>
<td>305</td>
<td>Organise the promotion of additional services or products to customers</td>
<td>3</td>
</tr>
<tr>
<td>306</td>
<td>Build a customer service knowledge set</td>
<td>3</td>
</tr>
</tbody>
</table>

### 3: Delivery

(Choose at least one of these units, which you feel is relevant to your role.)

<table>
<thead>
<tr>
<th>Unit</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>104</td>
<td>Do your job in a customer-friendly way</td>
<td>3</td>
</tr>
<tr>
<td>212</td>
<td>Deliver reliable customer service</td>
<td>3</td>
</tr>
<tr>
<td>213</td>
<td>Deliver customer service on your customer's premises</td>
<td>3</td>
</tr>
<tr>
<td>214</td>
<td>Recognise diversity when delivering customer service</td>
<td>3</td>
</tr>
<tr>
<td>215</td>
<td>Deal with customers across a language divide</td>
<td>3</td>
</tr>
<tr>
<td>216</td>
<td>Use questioning techniques when delivering customer service</td>
<td>3</td>
</tr>
<tr>
<td>Key: 1 Little or no responsibility 2 Considerable amount of responsibility 3 Total responsibility</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>217</strong></td>
<td>Deal with customers using bespoke software</td>
<td>⬤ ⬤ ⬤</td>
</tr>
<tr>
<td>Describe how you use the bespoke software system in the delivery of effective customer service.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>218</strong></td>
<td>Maintain customer service through effective handover</td>
<td>⬤ ⬤ ⬤</td>
</tr>
<tr>
<td>Give an example of when you passed on responsibility for a task, checking with those in the handover that the customer service action required was seen through to completion.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>307</strong></td>
<td>Deliver customer service using service partnerships</td>
<td>⬤ ⬤ ⬤</td>
</tr>
<tr>
<td>Describe who is involved in the service chain and give an example of a positive relationship you have built and nurtured in that chain.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>308</strong></td>
<td>Organise the delivery of reliable customer service</td>
<td>⬤ ⬤ ⬤</td>
</tr>
<tr>
<td>Describe how you plan, organise and review the delivery of customer service, explaining how improvements can be made to the information given.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>309</strong></td>
<td>Improve the customer relationship</td>
<td>⬤ ⬤ ⬤</td>
</tr>
<tr>
<td>Give an example of when you have had to balance the needs of your customer with those of the organisation while still managing to exceed customer expectations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**4: HANDLING PROBLEMS**
(Choose at least one of these units, which you feel is relevant to your role.)

| **105** | Recognise and deal with customer queries, requests and problems | ⬤ ⬤ ⬤ |
| Describe how you provided consistent and reliable customer service while dealing with customer queries, requests or problems. |
| **106** | Take details of customer service problems | ⬤ ⬤ ⬤ |
| Give an example of when you identified that there was a problem, obtained information about the problem and passed on the information so that the problem could be tackled. |
| **219** | Resolve customer service problems | ⬤ ⬤ ⬤ |
| Give an example of a customer service problem and the action you took to resolve it. |
| **220** | Deliver customer service to difficult customers | ⬤ ⬤ ⬤ |
| Describe a situation where you dealt directly with a difficult customer, trying to reach a resolution that satisfied everybody or at least reduced the risk of dissatisfaction. |
| **310** | Monitor and solve customer service problems | ⬤ ⬤ ⬤ |
| Give an example of a repeated customer service problem and the action you would take to solve it and avoid its future repetition. |
| **311** | Apply risk assessment to customer service | ⬤ ⬤ ⬤ |
| Describe a risk assessment technique you use to reduce any risks involved in the provision of customer service. |
| **312** | Process customer service complaints | ⬤ ⬤ ⬤ |
| Give an example of a complaint you might investigate and the different options you consider for its resolution. |

**5: DEVELOPMENT AND IMPROVEMENT**
(Choose at least one of these units, which you feel is relevant to your role.)

| **221** | Develop customer relationships | ⬤ ⬤ ⬤ |
| Give an example of how you have developed the long-term relationship between your customers and your organisation. |
| **222** | Support customer service improvements | ⬤ ⬤ ⬤ |
| Describe how you seek or could seek informal feedback from your customers in order to identify and support the implementation of improvements. |

*Continues on next page*
<table>
<thead>
<tr>
<th>Key: 1 Little or no responsibility 2 Considerable amount of responsibility 3 Total responsibility</th>
<th>1 2 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>223</strong></td>
<td><strong>Develop personal performance through delivering customer service</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you currently measure and develop yourself in order to perform effectively in your customer service role.</td>
</tr>
<tr>
<td><strong>224</strong></td>
<td><strong>Support customers using online customer services</strong></td>
</tr>
<tr>
<td></td>
<td>Describe a situation where you helped a customer to use an online system.</td>
</tr>
<tr>
<td><strong>225</strong></td>
<td><strong>Buddy a colleague to develop their customer service skills</strong></td>
</tr>
<tr>
<td></td>
<td>Describe a situation where you have worked alongside a colleague providing them with constructive feedback and support.</td>
</tr>
<tr>
<td><strong>226</strong></td>
<td><strong>Develop your own customer service skills through self-study</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you take responsibility for your own self-development in relation to customer service skills, locating and using the materials that help your learning.</td>
</tr>
<tr>
<td><strong>227</strong></td>
<td><strong>Support customers using self-service technology</strong></td>
</tr>
<tr>
<td></td>
<td>Describe a situation where you recognised the help needed by a customer to use self-service technology and gave it in a way that builds confidence in the equipment’s use.</td>
</tr>
<tr>
<td><strong>313</strong></td>
<td><strong>Work with others to improve customer service</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you monitor your own and your team’s performance and how you change the way you do things to improve customer service.</td>
</tr>
<tr>
<td><strong>314</strong></td>
<td><strong>Promote continuous improvement</strong></td>
</tr>
<tr>
<td></td>
<td>Give an example of when you identified a potential change to customer service, thought through the consequences of it and then made it work.</td>
</tr>
<tr>
<td><strong>315</strong></td>
<td><strong>Develop your own and others’ customer service skills</strong></td>
</tr>
<tr>
<td></td>
<td>Give an example of how you plan to coach and then coach others in developing specific and agreed customer service skills.</td>
</tr>
<tr>
<td><strong>316</strong></td>
<td><strong>Lead a team to improve customer service</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you plan, organise and support your team members to improve overall customer service.</td>
</tr>
<tr>
<td><strong>317</strong></td>
<td><strong>Gather, analyse and interpret customer feedback</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you plan, gather, analyse and interpret customer feedback.</td>
</tr>
<tr>
<td><strong>318</strong></td>
<td><strong>Monitor the quality of customer service transactions</strong></td>
</tr>
<tr>
<td></td>
<td>Describe how you prepare to monitor, then monitor and give feedback on the quality of customer service transactions.</td>
</tr>
</tbody>
</table>

Note additional qualifications, experience or responsibilities you have, which are relevant to this NVQ Certificate.

Candidate signature                  Candidate name (print)

Assessor signature                  Date
# WITNESS STATUS LIST

## LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

## USING YOUR WITNESS STATUS LIST

The witness status list lets you keep track of all the people who have witnessed the evidence you will use to complete the Level 2 NVQ Certificate in Customer Service. All necessary details must be included and signed by witnesses as being correct. Further forms may be provided by your assessor, which may be used to plan and record your progress. Your assessor will give you guidance on how and when these may be completed.

<table>
<thead>
<tr>
<th>Candidate's name</th>
<th>Name and contact address of witness</th>
<th>Witness status</th>
<th>Professional relationship</th>
<th>Units witnessed</th>
<th>Witness signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Include all witnesses who have signed candidate evidence or witnessed a report. Ensure that the witness signs the details as correct.

## Witness status categories

1. A1, A2, V1, V2 or TAQA with occupational experience
2. A1, A2, V1, V2 or TAQA without occupational experience
3. Occupational expert familiar with standards
4. Occupational expert not familiar with standards
5. Non-expert not familiar with standards

*Continues on next page*
## WITNESS STATUS LIST

**LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE CONTINUED**

<table>
<thead>
<tr>
<th>Name and contact address of witness</th>
<th>Witness status</th>
<th>Professional relationship</th>
<th>Units witnessed</th>
<th>Witness signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Include all witnesses who have signed candidate evidence or witnessed a report. Ensure that the witness signs the details as correct.

**Witness status categories**

1. A1, A2, V1, V2 or TAQA with occupational experience
2. A1, A2, V1, V2 or TAQA without occupational experience
3. Occupational expert familiar with standards
4. Occupational expert not familiar with standards
5. Non-expert not familiar with standards

<table>
<thead>
<tr>
<th>Assessor’s signature</th>
<th>Date</th>
</tr>
</thead>
</table>
# SUMMARY OF UNIT ACHIEVEMENT

**LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE**

By signing this summary of unit achievement we are confirming that all the assessment criteria and evidence requirements for these units have been completed and that the evidence is authentic and has been obtained under specified conditions for which certification is now requested.

<table>
<thead>
<tr>
<th>Candidate name</th>
<th>Candidate enrolment number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Centre name</th>
<th>Centre number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date started</th>
<th>Date achieved</th>
<th>Assessor signature</th>
<th>Candidate signature</th>
<th>IV signature (if sampled)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Mandatory units (both units must be completed)**

**CUSTOMER SERVICE FOUNDATIONS**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Communicate using customer service language</td>
</tr>
<tr>
<td>201</td>
<td>Follow the rules to deliver customer service</td>
</tr>
</tbody>
</table>

**Optional units (including at least one from each of the themes)**

**IMPRESSION AND IMAGE**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>102</td>
<td>Maintain a positive and customer-friendly attitude</td>
</tr>
<tr>
<td>103</td>
<td>Adapt your behaviour to give a good customer service impression</td>
</tr>
<tr>
<td>202</td>
<td>Communicate effectively with customers</td>
</tr>
<tr>
<td>203</td>
<td>Give customers a positive impression of yourself and your organisation</td>
</tr>
<tr>
<td>204</td>
<td>Promote additional services or products to customers</td>
</tr>
<tr>
<td>205</td>
<td>Process information about customers</td>
</tr>
<tr>
<td>206</td>
<td>Live up to the customer service promise</td>
</tr>
<tr>
<td>207</td>
<td>Make customer service personal</td>
</tr>
<tr>
<td>208</td>
<td>Go the extra mile in customer service</td>
</tr>
<tr>
<td>209</td>
<td>Deal with customers face to face</td>
</tr>
<tr>
<td>210</td>
<td>Deal with incoming telephone calls from customers</td>
</tr>
</tbody>
</table>

*Continues on next page*
## SUMMARY OF UNIT ACHIEVEMENT

### LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

**CONTINUED**

<table>
<thead>
<tr>
<th>Candidate signature</th>
<th>Assessor signature</th>
<th>Date achieved</th>
<th>Date started</th>
<th>IV signature (if sampled)</th>
</tr>
</thead>
<tbody>
<tr>
<td>211 Make telephone calls to customers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>303 Deal with customers in writing or electronically</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>304 Use customer service as a competitive tool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>305 Organise the promotion of additional services or products to customers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>306 Build a customer service knowledge set</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### DELIVERY

<table>
<thead>
<tr>
<th>Candidate signature</th>
<th>Assessor signature</th>
<th>Date achieved</th>
<th>Date started</th>
<th>IV signature (if sampled)</th>
</tr>
</thead>
<tbody>
<tr>
<td>104 Do your job in a customer-friendly way</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>212 Deliver reliable customer service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>213 Deliver customer service on your customer’s premises</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>214 Recognise diversity when delivering customer service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>215 Deal with customers across a language divide</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>216 Use questioning techniques when delivering customer service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>217 Deal with customers using bespoke software</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>218 Maintain customer service through effective handover</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>307 Deliver customer service using service partnerships</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>308 Organise the delivery of reliable customer service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>309 Improve the customer relationship</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### HANDLING PROBLEMS

<table>
<thead>
<tr>
<th>Candidate signature</th>
<th>Assessor signature</th>
<th>Date achieved</th>
<th>Date started</th>
<th>IV signature (if sampled)</th>
</tr>
</thead>
<tbody>
<tr>
<td>105 Recognise and deal with customer queries, requests and problems</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>106 Take details of customer service problems</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>Task Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>----------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>219</td>
<td>Resolve customer service problems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>220</td>
<td>Deliver customer service to difficult customers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>310</td>
<td>Monitor and solve customer service problems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>311</td>
<td>Apply risk assessment to customer service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>312</td>
<td>Process customer service complaints</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DEVELOPMENT AND IMPROVEMENT**

<table>
<thead>
<tr>
<th>Number</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>221</td>
<td>Develop customer relationships</td>
</tr>
<tr>
<td>222</td>
<td>Support customer service improvements</td>
</tr>
<tr>
<td>223</td>
<td>Develop personal performance through delivering customer service</td>
</tr>
<tr>
<td>224</td>
<td>Support customers using online customer services</td>
</tr>
<tr>
<td>225</td>
<td>Buddy a colleague to develop their customer service skills</td>
</tr>
<tr>
<td>226</td>
<td>Develop your own customer service skills through self-study</td>
</tr>
<tr>
<td>227</td>
<td>Support customers using self-service technology</td>
</tr>
<tr>
<td>313</td>
<td>Work with others to improve customer service</td>
</tr>
<tr>
<td>314</td>
<td>Promote continuous improvement</td>
</tr>
<tr>
<td>315</td>
<td>Develop your own and others' customer service skills</td>
</tr>
<tr>
<td>316</td>
<td>Lead a team to improve customer service</td>
</tr>
<tr>
<td>317</td>
<td>Gather, analyse and interpret customer feedback</td>
</tr>
<tr>
<td>318</td>
<td>Monitor the quality of customer service transactions</td>
</tr>
</tbody>
</table>

I can confirm the candidate has personally completed the work as part of regular duties in the workplace.

<table>
<thead>
<tr>
<th>Employer signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WHAT HAVE YOU DONE IN YOUR WORKPLACE THAT IS SIMILAR?

This space allows you to write down an activity that you have carried out in your job that you believe shows you can do this unit (e.g. promoting extra products and services). You can then talk to your assessor about how this activity might be turned into observed evidence that will make part of your evidence portfolio.

ASSESSMENT METHOD KEY

There are various different types of evidence that you can use to complete a unit. You may use observation, where your assessor sees you complete an action, or witness testimony, where an expert witness (e.g. your manager) observes you in the workplace. You could even use a photograph or a piece of video documenting that you have carried out an activity. Whichever route you take, talk to your assessor to agree a plan of how to put together the evidence.

ASSESSMENT EVIDENCE

This shows 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 a variety of methods and recorded and referenced by your assessor in the box below. On the following 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’.

You should note

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and it must be sufficient to show you can do the activities described in the unit. Evidence can be obtained from internal or external to the organisation, however, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Evidence is not allowed for any performance evidence within the unit. Guidelines for a Realistic Working Environment (arcs found evidence) are available for NVQs at Levels 1, 2, 3 and 4 (February 2010).

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

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

4. Your communication with customers may be face to face, in writing, telephone, text message, e-mail, internet (including social networking), in a not-for-profit organisation or a public sector organisation through work in a private sector organisation, a not for profit organisation or a public services organisation. Evidence may be gained through direct observation or products of work, recorded and referenced 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’.

Assessed evidence

Evidence from your workplace that is similar...
WHAT YOU MUST COVER

These statements include the range of different activities or tasks that need to be undertaken in order for you to prove competence. The relevant evidence reference from your ‘Assessed evidence’ box should be written in the shaded area.

WHAT YOU MUST DO

These statements describe the tasks and activities you must complete. The relevant evidence reference from your ‘Assessed evidence’ box is written in the shaded area.

**Get it covered…**

This isn’t about hard sell - it’s about involving your products or services and what meets your customers’ needs. It’s about making sure you offer your customers products or services that are to their needs, not to your organisation or that can add the way they use existing products or services.

**R is for refer**

It is important in any organisation that any information you give your customers on services or products is accurate. If a customer asks for information about a service or product that you are not responsible, it is important you ask someone else for the information or pass it to the right person to deal with.

**Evidence reference should be entered in the shaded area.**

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

**Signature of assessor Date**

**Signature of candidate Date**

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

**Countersignature of IV Date**

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

**Countersignature of EV Date**

**Unit sign-off**

The knowledge that you need to demonstrate you have. The relevant evidence reference from your ‘Assessed evidence’ box should be written in the shaded area.

**Filling out the units**
FURTHER INFORMATION

CONTACTING THE SECTOR SKILLS BODY
The Sector Skills Body (SSB) responsible for the National Occupational Standards on which this NVQ Certificate is based is:

The CFA (Council for Administration)
6 Graphite Square
Vauxhall Walk
London
SE11 5EE
T +44 (0)20 7091 9620
email: info@cfa.uk.com
website: www.cfa.uk.com

APPRENTICESHIP FRAMEWORK
Apprenticeships are planned programmes of training, learning and assessment aimed at young people. This government-led initiative is primarily aimed at 16- to 25-year-olds, although if you’re over 25 you might still be eligible for funding. There’s also funding available to help employers to deliver apprenticeships. See the following websites for information on the apprenticeship framework for customer service:
www.cfa.uk.com/qualifications/apprenticeships_pan_sector.html
www.instituteofcustomerservice.com/Apprenticeships.aspx

STAR UNITS
The Star Units scheme seeks to recognise exceptional performance in candidates completing their vocational, competence-based qualifications. Star Units differentiates between those candidates who are competent and those who go the extra mile and deliver higher standards and quality in the workplace having been given the same specification of work. If you and your assessor would like to know more, contact star.units@cityandguilds.com or go to www.starunits.org

FURTHER RESOURCES
The Level 2 NVQ Certificate in Customer Service is just the starting point for your career:

• Interested in taking your qualification further? For more information about other customer service qualifications, including the Level 3 and 4 qualifications, go to:
www.cityandguilds.com

• The Institute of Customer Service publishes a range of materials to support customer service professionals and keep them up to date with the world of customer service. Its range includes ICS Breakthrough Research reports, Literature Reviews and customerfirst, the bi-monthly magazine for ICS members.
To find out more, go to:
www.instituteofcustomerservice.com/Publications.aspx

• Good customer service is its own reward, as the winners of the National Customer Service Awards discovered; see:
www.customerserviceawards.com/ncsahomepage/index.cfm

• Or why not take a look at how the government is taking customer service seriously in the public sector at:
www.cse.cabinetoffice.gov.uk/homeCSE.do
This unit is all about the basic skills you need to play your part in your organisation’s overall customer service operation. The unit sits within the customer service theme of Customer Service Foundations. This theme covers the language and concepts of customer service, as well as the organisational context and the external environment in which you have to work.

**WHY CUSTOMER SERVICE MATTERS TO... AN ENGINEER**

Engineers must know about the products or services the organisation delivers and be able to answer simple questions about them. They also need to know the organisation’s procedures and guidelines to make sure they deliver efficiently.
UNIT 101 (LEVEL 1 UNIT, 4 CREDITS)
COMMUNICATE USING CUSTOMER SERVICE LANGUAGE

What this unit is about

This unit is about the language and basic principles that are at the heart of customer service and the skills needed to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service.

You need to be able to describe and explain the service or products that your organisation offers and how it delivers customer service.

**AN EXAMPLE**
Your team leader gave you an induction when you started, where you were told about the organisation, what it does, who’s who and what you were expected to do. Over time you are encouraged to update your knowledge from the organisation’s intranet, trade magazines and training sessions. You also attend team meetings where you discuss your experiences and how your practice could improve.

<table>
<thead>
<tr>
<th>What have you done in your workplace that is similar?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write your answer in this space…</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

101.1 can identify customers and their characteristics and expectations

101.2 can identify your organisation’s services and products

101.3 know how to communicate using customer service language.

Key words and phrases for this unit

types of customer
customer expectations
customer service language
organisation’s procedures
services and products
internal/external customer
teamwork
service offer
sources of information

Evidence for this unit could come from many other units in this qualification, e.g. 204, 206 or 209.
### You should note

1. Wherever possible, your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. The ‘organisation’ from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The ‘organisation’ may be the whole of the organisation or the business unit, division or department with which you are involved.

---

### 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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**

- O Observation
- Q Questioning
- PE Product Evidence
- WT Witness Testimony
- PD Professional Discussion
What you must do

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

101.1 To identify customers and their characteristics and expectations, you must:
  101.1.1 recognise typical customers and their expectations
  101.1.2 discuss customer expectations with colleagues using recognised customer service language
  101.1.3 follow procedures through which you and your colleagues deliver effective customer service.

101.2 To identify your organisation’s services and products, you must:
  101.2.1 outline your organisation’s services and products to customers
  101.2.2 greet customers politely and positively
  101.2.3 list the information you need to deliver effective customer service and where that information can be found.

What they say...
There is only one boss. The customer. And he can fire everybody in the company from the chairman down, simply by spending his money somewhere else.
Sam Walton, founder of Wal-Mart Stores

What’s good to do?
Keep up to date on the products and services offered and know where to get that information. Good customer service is as important for the organisation as it is for the customer.
What you must know

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

**101.3** To know how to communicate using customer service language, you must be able to:

<table>
<thead>
<tr>
<th>101.3.1</th>
<th>identify the differences between an internal customer and an external customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>101.3.2</td>
<td>list your organisation’s services or products</td>
</tr>
<tr>
<td>101.3.3</td>
<td>describe the connection between customer expectations and customer satisfaction in customer service</td>
</tr>
<tr>
<td>101.3.4</td>
<td>describe why organisation procedures are important to good customer service</td>
</tr>
<tr>
<td>101.3.5</td>
<td>explain why teamwork is central to good customer service</td>
</tr>
<tr>
<td>101.3.6</td>
<td>identify the service offer of your organisation</td>
</tr>
<tr>
<td>101.3.7</td>
<td>identify the part you play in delivering customer service</td>
</tr>
<tr>
<td>101.3.8</td>
<td>identify who your customers are</td>
</tr>
<tr>
<td>101.3.9</td>
<td>describe the main characteristics of typical customers that you deal with</td>
</tr>
<tr>
<td>101.3.10</td>
<td>identify what impresses your customers and what annoys your customers</td>
</tr>
<tr>
<td>101.3.11</td>
<td>identify who’s who and who does what to deliver customer service in your organisation</td>
</tr>
<tr>
<td>101.3.12</td>
<td>describe the kinds of information you need to give good customer service to customers</td>
</tr>
<tr>
<td>101.3.13</td>
<td>explain how to find information about your organisation’s services and products</td>
</tr>
<tr>
<td>101.3.14</td>
<td>list typical customer service problems in your work and who should be told about them</td>
</tr>
<tr>
<td>101.3.15</td>
<td>explain how the way you behave affects your customer’s service experience</td>
</tr>
</tbody>
</table>

**In the know...**

Which policies and rules at your organisation do you think are about internal issues such as health and safety, and which are about providing a better service to customers? Offering good customer service can ensure your organisation has a good reputation with customers.
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.

<table>
<thead>
<tr>
<th>Signature of candidate</th>
<th>Date</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Signature of assessor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of assessor</td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signature of IV (if sampled)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of IV</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of EV (if sampled)</td>
<td>Date</td>
</tr>
</tbody>
</table>

What they say...
Every company’s greatest assets are its customers, because without customers there is no company.
Michael LeBocuf, author
This unit is all about making sure you work within the rules and regulations that govern your organisation and its business. The unit sits within the customer service theme of Customer Service Foundations. This theme covers the language and concepts of customer service, as well as the organisational context and the external environment in which you have to work.

**WHY CUSTOMER SERVICE MATTERS TO... A CARE ASSISTANT**

A care assistant may work with a range of people requiring care and assistance. Carers can provide both physical and emotional support for many people, working in a person’s own home or in a residential setting. Whatever the circumstances, there will be a need for confidentiality and to ensure the security and safety of the client.
UNIT 201 (LEVEL 2 UNIT, 4 CREDITS)
FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

What this unit is about

There are rules in organisations that limit what you can and cannot do for customers. Some rules are set by your organisation and some are defined by law and apply to everybody’s jobs. Other rules are set by regulations that apply to particular industries. You need to know your organisation’s rules and procedures and how these limit what you can do for customers. You also need to be aware of the wider laws and regulations, which are set outside of your organisation, and how they apply to you and your job.

This unit requires you to understand all the rules that apply to customer service delivered by the organisation and how they apply to you and your job.

AN EXAMPLE

You are asked to buddy a new team member. You tell him about the job, what he can do and what he needs to refer to others. You explain to him what the organisation’s policies and procedures are and where this information can be found. By following the policies and procedures correctly yourself, you set an example for him to follow.

What have you done in your workplace that is similar?

Write your answer in this space...

Now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

201.1 can follow your organisation’s customer service practices and procedures

201.2 know how to follow the rules to deliver customer service.

Key words and phrases for this unit

- follow organisation procedures
- recognise limitations
- refer on (i.e. pass on the problem or task to someone who can deal with it)
- follow external regulations
- follow external legislation
- work safely
- respect confidentiality
- awareness of security

Evidence for this unit could come from many other units in this qualification, e.g. 214, 220, 221 or 223.
You should note

1 Wherever possible, your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4 The ‘organisation’ from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The ‘organisation’ may be the whole of the organisation or the business unit, division or department with which you are involved.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment method key

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

is for regulations

There are rules, regulations, policies and procedures in place to make sure everyone knows what they can and can’t do, and you are no different. There will be a point beyond which you will need permission to do things.
UNIT 201 (LEVEL 2 UNIT, 4 CREDITS)
FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

What you must cover

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

1. You must provide evidence of following the rules to deliver customer service:
   a. during routine delivery of customer service
   b. during a busy time in your job
   c. during a quiet time in your job
   d. when people, systems or resources have let you down.

is for legislation
Any organisation offering products or services must abide by laws that affect its business and apply the legislation through policies and procedures. If you don’t follow those policies and procedures you may cause your organisation to break the law.

What they say...
The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.

Peter F Drucker, writer
What you must do

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

### 201.1 To follow your organisation’s customer service practices and procedures, you must:

| 201.1.1 | follow organisational practices and procedures that relate to your customer service work |
| 201.1.2 | recognise the limits of what you are allowed to do when delivering customer service |
| 201.1.3 | refer to somebody in authority when you need to |
| 201.1.4 | work in a way that protects the security of customers and their property |
| 201.1.5 | work in a way that protects the security of information about customers. |

---

**What they say...**

If you do build a great experience, customers tell each other about that. Word of mouth is very powerful.

Jeff Bezos, founder of Amazon.com

---

**R**

is for reputation

Reputation is all about an organisation’s good name, and businesses work hard to protect theirs. Your behaviour can affect that reputation, so always offer excellent customer service and you will assist your organisation in protecting its good name.
UNIT 201 (LEVEL 2 UNIT, 4 CREDITS)
FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

What you must know

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

201.2 To know how to follow the rules to deliver customer service, you must be able to:

201.2.1 describe organisational practices and procedures that relate to your customer service work

201.2.2 identify the limits of what you are allowed to do when delivering customer service

201.2.3 explain when and how you should refer to somebody in authority about rules for delivering customer service

201.2.4 explain how you protect the security of customers and their property

201.2.5 explain how you protect the security of information about customers

201.2.6 describe your health and safety responsibilities as they relate to your customer service work

201.2.7 explain your responsibilities to deliver customer service treating customers equally

201.2.8 explain why it is important to respect customer and organisation confidentiality

201.2.9 list the main things that you must do and not do in your job under legislation that affects your customer service work

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

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
This unit is about how to create a good impression with customers, of both yourself and your organisation. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

WHY CUSTOMER SERVICE MATTERS TO... A FLIGHT ATTENDANT
The main duty of flight attendants is to ensure safety but they also provide a vital care-giving and customer service role. Effectively acting as ambassadors for the airline, they reassure passengers in the event of an emergency, as well as dealing with unacceptable behaviour.
UNIT 203 (LEVEL 2 UNIT, 5 CREDITS)
GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

What this unit is about

Excellent customer service is provided by those who are good with people. Your behaviour affects the impression that customers form of the service they are receiving.

This unit is all about communicating with customers and giving a positive impression of yourself whenever you deal with a customer. By doing this you will also be giving a positive impression of your organisation and the service it provides.

All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, respond to us and give us good information. Every detail of your behaviour counts when dealing with a customer.

AN EXAMPLE

A customer returns to your shop complaining that the handbag she bought a week ago is no longer fit for use. By listening to her without interruption, giving eye contact and the occasional nod of the head in affirmation, you are already on the right track to negotiating a positive outcome for both your customer and your organisation.

Elements in this unit

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

- 203.1 can establish rapport with customers
- 203.2 can respond appropriately to customers
- 203.3 can communicate information to customers
- 203.4 understand how to give customers a positive impression of yourself and your organisation.

Key words and phrases for this unit

meeting and greeting
identifying customer expectations
respond appropriately
give information to customers
check understanding
locating information
adapting behaviour
communicating

What have you done in your workplace that is similar? Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.
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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4 Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

is for expectation

Customers’ expectations are formed by a number of things: what they hear and see, what they read and what the organisation tells them, what happens during their experience and what has happened to them in the past.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment method key

O Observation Q Questioning PE Product Evidence WT Witness Testimony PD Professional Discussion
UNIT 203 (LEVEL 2 UNIT, 5 CREDITS)
GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

What you must cover

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

1  You must provide evidence of creating a positive impression with customers:
   a  during routine delivery of customer service
   b  during a busy time in your job
   c  during a quiet time in your job
   d  when people, systems or resources have let you down.

2  You must provide evidence that you communicate with customers effectively by:
   a  using appropriate spoken or written language
   b  applying the conventions and rules appropriate to the method of communication you have chosen.

Get it covered...

Remember how you feel when you have been treated badly or given poor customer service. You want to be treated as an individual and so do your customers. Show you can remain calm, attentive and polite to everyone, and stick to the organisation’s procedures at all times.

A

is for adapting behaviour

Customers have expectations. They expect to be dealt with courteously and with respect. Sometimes this means you need to adapt your behaviour, e.g. speak confidently and knowledgeably to someone who expects you to offer them information promptly and accurately.

What they say...

Business is not just doing deals; business is having great products, doing great engineering, and providing tremendous service to customers. Finally, business is a cobweb of human relationships.

H Ross Perot, founder of EDS
What you must do

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

**203.1** To establish rapport with customers, you must:

- **203.1.1** meet your organisation’s standards of appearance and behaviour
- **203.1.2** greet your customer respectfully and in a friendly manner
- **203.1.3** communicate with your customer in a way that makes them feel valued and respected
- **203.1.4** identify and confirm your customer’s expectations
- **203.1.5** treat your customer courteously and helpfully at all times
- **203.1.6** keep your customer informed and reassured
- **203.1.7** adapt your behaviour to respond effectively to different customer behaviour.

**What’s good to do?**

No matter what work or task you do, your customers will expect you to treat them courteously and with respect. Help your customers by getting them the information they need and make sure they understand it. If you can’t meet their needs clearly explain why.

**203.2** To respond appropriately to customers, you must:

- **203.2.1** respond promptly to a customer seeking help
- **203.2.2** choose the most appropriate way to communicate with your customer
- **203.2.3** check with your customer that you have fully understood their expectations
- **203.2.4** respond promptly and positively to your customer’s questions and comments
- **203.2.5** allow your customer time to consider your response and give further explanation when appropriate.

**203.3** To communicate information to customers, you must:

- **203.3.1** quickly find information that will help your customer
- **203.3.2** give your customer information they need about the services or products offered by your organisation
- **203.3.3** recognise information that your customer might find complicated and check whether they fully understand
- **203.3.4** explain clearly to your customers any reasons why their expectations cannot be met.
UNIT 203 (LEVEL 2 UNIT, 5 CREDITS)
GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

What you must know

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

203.4 To understand how to give customers a positive impression of yourself and the organisation, you must be able to:

203.4.1 describe your organisation's standards for appearance and behaviour

203.4.2 explain your organisation's guidelines for how to recognise what your customer wants and respond appropriately

203.4.3 identify your organisation's rules and procedures regarding the methods of communication you use

203.4.4 explain how to recognise when a customer is angry or confused

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

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

In the know...

Customers expect a certain standard of behaviour and appearance. Find out the dress code and how you are expected to deliver customer service.
This unit is all about how to promote your organisation’s services and products to customers. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

**WHY CUSTOMER SERVICE MATTERS TO... A HAIRDRESSER**

In hairdressing, the customers want to know about the latest styles and products. They also want to be informed about improvements to existing products and services and how these will benefit them. There are occasions in a salon when products or services could be suggested to add to the customer experience.
What this unit is about

Services or products in organisations continually change to keep up with customers’ expectations. By offering new or improved services and products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world.

However, it is equally important for organisations that are not in competitive environments to encourage their customers to try new services or products.

This unit is all about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect to be offered services or products to meet their expectations.

They need to be made aware of what is available from your organisation to give them a greater choice. Because of this, everybody offering services or products needs to play a part in making customers aware of what is available.

**AN EXAMPLE**

A new product has arrived and you read the literature on it. You realise a number of customers who have previously bought a similar product might be interested in this one. You give detailed information on this product to customers who have shown an interest.

What have you done in your workplace that is similar? Write your answer in this space...

---

Elements in this unit

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

- **204.1** can identify additional services or products that are available
- **204.2** can inform customers about additional services or products
- **204.3** can gain customer commitment to using additional services or products
- **204.4** understand how to promote additional services or products to customers.

**Key words and phrases for this unit**

- promote additional products or services (e.g. what’s new or improved)
- refer customer (e.g. if you can’t help your customers, find out who can)
- identify opportunities
- give information
- listen
- secure agreement
- close conversation (e.g. leave the customer satisfied and willing to return)

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 201, 202, 203, 205, 207 or 209.

...now talk to your assessor about how this could be turned into observed evidence.
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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4 Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment method key
O Observation Q Questioning PE Product Evidence WT Witness Testimony PD Professional Discussion
What you must cover

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

1 You must provide evidence that the additional services or products offered include:
   a use of services or products that are new to your customer
   b additional use of services or products that your customer has used before.

2 Your evidence must show that you:
   a identify what your customer wants by seeking information directly
   b identify what your customer wants from spontaneous customer comments.

Get it covered...
This isn’t about hard sell – it’s about knowing your products or services and what meets your customers’ needs. It is about making sure you offer your customers products or services that are new to them, new to your organisation or that can add to the way they use existing products or services.

is for sources of information
Organisations need to develop new products or services to ensure they satisfy customer needs. Information on products and services can be obtained from a variety of sources – for example, an intranet, organisational updates, training, even from colleagues – and should be accessed to ensure accurate information is given to customers.

is for refer
It is important in any organisation that any information you give your customers on services or products is accurate. If a customer asks for information about a service or product that is not your responsibility, it is important you ask someone else for the information or pass it to the right person to deal with.
What you must do

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

204.1 To identify additional services or products that are available, you must:

204.1.1 update and develop your knowledge of your organisation’s services or products

204.1.2 check with others when you are unsure about new service or product details

204.1.3 identify appropriate services or products that may interest your customer

204.1.4 spot opportunities for offering your customer additional services or products that will improve the customer experience.

204.2 To inform customers about additional services or products, you must:

204.2.1 choose the best time to inform your customer about additional services or products

204.2.2 choose the best method of communication to introduce your customer to additional services or products

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

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

204.3 To gain customer commitment to using additional services or products, you must:

204.3.1 close the conversation if your customer shows no interest

204.3.2 give information to move the situation forward when your customer shows interest

204.3.3 secure customer agreement and check customer understanding of the delivery of the service or product

204.3.4 take action to ensure prompt delivery of the additional services or products to your customer

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

What’s good to do?

Keep up to date on your products and services. Know your customers and keep them up to date, too. When they show interest in a new or improved product or service, answer their questions and help them to make a decision.
## UNIT 204 (LEVEL 2 UNIT, 6 CREDITS)

### PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

**What you must know**

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

### 204.4 To understand how to promote additional services or products to customers, you must be able to:

<table>
<thead>
<tr>
<th>Sub-point</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>204.4.1</td>
<td>describe your organisation's procedures and systems for encouraging the use of additional services or products</td>
</tr>
<tr>
<td>204.4.2</td>
<td>explain how the use of additional services or products will benefit your customers</td>
</tr>
<tr>
<td>204.4.3</td>
<td>explain how your customer's use of additional services or products will benefit your organisation</td>
</tr>
<tr>
<td>204.4.4</td>
<td>identify the main factors that influence customers to use your services or products</td>
</tr>
<tr>
<td>204.4.5</td>
<td>explain how to introduce additional services or products to customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</td>
</tr>
<tr>
<td>204.4.6</td>
<td>state how to give appropriate, balanced information to customers about services or products</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Signature of candidate</th>
<th>Date</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Signature of assessor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of assessor</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of IV (if sampled)</td>
<td>Date</td>
</tr>
<tr>
<td>Countersignature of IV</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of EV (if sampled)</td>
<td>Date</td>
</tr>
</tbody>
</table>
This unit is all about collecting and using information about your customers, which can help you to provide them with the service they expect. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

**WHY CUSTOMER SERVICE MATTERS TO... AN ESTATE AGENT**

Working in an estate agency means dealing with customers who want to sell and those who want to buy. Processing information is a large part of this job – from answering queries to confirming a sale, the estate agent needs to collect information and then ensure it is correct.
Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 105, 106, 201, 203, 205, 206, 207 or 209.

What this unit is about

You and your organisation need customer service information to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service.

Some customer service information is collected from your customers. Other customer service information is collected through information systems and equipment that make records of service delivery. In either case, you must collect information, retrieve it and supply it when appropriate.

Good customer service information provides a sound basis for all customer service transactions. The quality of the customer service information depends heavily on the skills and attention to detail of the person dealing with the information.

**AN EXAMPLE**

You receive a call from a customer who is moving house and wants to give you their forwarding address. You take all the details and confirm them, updating the customer’s records accordingly. You ask the customer if they require further assistance and agree to have some further information sent out to them. You note this, closing the call accordingly.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

**Elements in this unit**

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

- **205.1** can collect information about customers
- **205.2** can select and retrieve information about customers
- **205.3** can supply information about customers
- **205.4** understand how to process customer service information.

**Key words and phrases for this unit**

- collect information
- record information
- ensure accuracy and sufficiency of information
- store information
- answer questions
- select information
- retrieve information
- supply information

You and your organisation need customer service information to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service.

Some customer service information is collected from your customers. Other customer service information is collected through information systems and equipment that make records of service delivery. In either case, you must collect information, retrieve it and supply it when appropriate.

Good customer service information provides a sound basis for all customer service transactions. The quality of the customer service information depends heavily on the skills and attention to detail of the person dealing with the information.

**AN EXAMPLE**

You receive a call from a customer who is moving house and wants to give you their forwarding address. You take all the details and confirm them, updating the customer’s records accordingly. You ask the customer if they require further assistance and agree to have some further information sent out to them. You note this, closing the call accordingly.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

**Elements in this unit**

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

- **205.1** can collect information about customers
- **205.2** can select and retrieve information about customers
- **205.3** can supply information about customers
- **205.4** understand how to process customer service information.

**Key words and phrases for this unit**

- collect information
- record information
- ensure accuracy and sufficiency of information
- store information
- answer questions
- select information
- retrieve information
- supply information

You and your organisation need customer service information to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service.

Some customer service information is collected from your customers. Other customer service information is collected through information systems and equipment that make records of service delivery. In either case, you must collect information, retrieve it and supply it when appropriate.

Good customer service information provides a sound basis for all customer service transactions. The quality of the customer service information depends heavily on the skills and attention to detail of the person dealing with the information.

**AN EXAMPLE**

You receive a call from a customer who is moving house and wants to give you their forwarding address. You take all the details and confirm them, updating the customer’s records accordingly. You ask the customer if they require further assistance and agree to have some further information sent out to them. You note this, closing the call accordingly.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.
**I**
is for information systems

Organisations collect information about their customers that helps them deliver effective customer service. This information may be as simple as customers’ names and addresses and the products and services purchased, while some organisations may collect more detailed information. Whatever is collected and stored, the organisation must comply with data protection legislation to ensure the information remains confidential.

**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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

**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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**

- **O** Observation
- **Q** Questioning
- **PE** Product Evidence
- **WT** Witness Testimony
- **PD** Professional Discussion
UNIT 205 (LEVEL 2 UNIT, 5 CREDITS)
PROCESS INFORMATION ABOUT CUSTOMERS

What you must cover

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

1 Your evidence must prove that you have processed customer information relating to:
   a new customers
   b existing customers.

2 In dealing with customers’ information, you must provide evidence that you have:
   a checked whether the information you are collecting and retrieving is accurate and up to date
   b selected information that is directly relevant to each of your customers.

Get it covered...

It is important to know as much as possible about your customers. Get to know your new customers and update the information on your existing customers. Your organisation will set guidelines on the information you should gather, but it is important that the information you have is always accurate and up to date.

is for costs and resources

Delivering customer service involves an organisation spending money and using resources such as staff time, equipment and materials. Accurate detail on customers is necessary to ensure time and resources are not spent on incorrect information.
What you must do

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

205.1 To collect information about customers, you must:

205.1.1 collect and record new information about customers following your organisation’s guidelines

205.1.2 update existing information about customers

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

205.2 To select and retrieve information about customers, you must:

205.2.1 respond promptly to authorised requests for information about customers

205.2.2 select and retrieve relevant information for customers or colleagues following your organisation’s guidelines.

205.3 To supply information about customers, you must:

205.3.1 supply accurate and sufficient information about customers to meet your customers’ or colleagues’ expectations

205.3.2 choose the most appropriate way to supply information to your customers or colleagues

205.3.3 confirm that your customers or colleagues have received and understood the customer service information.

What’s good to do?

In dealing with customer data you need to collect accurate information about customers and make it available only to those who are authorised to have it. Remember that information is confidential and covered by legislation. Don’t give it out unless you have permission.

What they say...

If things are not going well with you, begin your effort at correcting the situation by carefully examining the service you are rendering, and especially the spirit in which you are rendering it.

Roger Babson, business forecaster and author
UNIT 205 (LEVEL 2 UNIT, 5 CREDITS)
PROCESS INFORMATION ABOUT CUSTOMERS

What you must know

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

205.4 To understand how to process customer service information, you must be able to:

205.4.1 describe your organisation’s procedures and guidelines for collecting, retrieving and supplying information about customers

205.4.2 identify types of personal information about customers that should and should not be kept on record

205.4.3 explain how to collect information about customers efficiently and effectively

205.4.4 explain how to operate the customer information storage system

205.4.5 explain why processing information about customers correctly makes an important contribution to effective customer service

205.4.6 explain the importance of attention to detail when processing information about customers

205.4.7 describe the legal and regulatory restrictions on the storage and use of customer data.

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
This unit is all about providing service to customers in person. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

**WHY CUSTOMER SERVICE MATTERS TO... A RECEPTIONIST**

A receptionist is the face of the organisation and can be found in all types of settings, including businesses, government offices, medical centres and hospitals. They greet visitors and direct them to the correct person or department, often providing information about the organisation. Increasingly, they help to monitor the security of an organisation and sometimes can encounter difficult or irate visitors.
UNIT 209 (LEVEL 2 UNIT, 5 CREDITS)
DEAL WITH CUSTOMERS
FACE TO FACE

What this unit is about

This unit is all about the skills you need to deal with your customer in person. When you are working with a customer in this way, good feelings about the way you look and behave can improve how your customer feels about the transaction and give them greater satisfaction.

While verbal communication is important, your focus on your customer and the relationship that is formed also depends on the non-verbal communication that takes place between you. You have many opportunities to impress your customer and your behaviour in this situation can make all the difference to the customer’s behaviour and the satisfaction that they feel.

AN EXAMPLE

You work in a reception area and need to have all the information regarding the organisation to hand and know all the contact details. On a busy day, a large group of foreign visitors arrives. In order to deal with this situation, you must be conscious of the needs, expectations, safety and security of the many different types of customers.

What have you done in your workplace that is similar? Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

209.1 can communicate effectively with your customer
209.2 can improve the rapport with your customer through body language
209.3 understand how to deal with customers face to face.

Key words and phrases for this unit

communicating
working face to face
understanding behaviour
giving a professional image
balancing demands
understanding body language
building a rapport
keeping focused

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 105, 201, 203, 205, 207, 210, 214, 219 or 221.
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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

is for body language

Body language means the facial expressions, gestures and postures that you use in order to communicate. The customer’s body language can tell you more about what they are thinking than the words they use. Your body language is important, too. Having folded arms and not smiling is unlikely to make your customer feel welcome, whereas smiling and shaking their hand does.

Assessment method key

O Observation Q Questioning PE Product Evidence WT Witness Testimony PD Professional Discussion
What you must cover

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

1 Your evidence must include examples of dealing with customers who:
   a have standard expectations of your organisation’s customer service
   b have experienced difficulties when dealing with your organisation
   c have made a specific request for information
   d need to be informed of circumstances of which they are unaware.

2 Your evidence must include examples of dealings with customers that are:
   a planned
   b unplanned.

3 You must provide evidence of dealing with customers face to face:
   a during routine delivery of customer service
   b during a busy time in your job
   c during a quiet time in your job
   d when people, systems or resources have let you down.

4 You must include examples of how you have made use of:
   a verbal communication skills
   b non-verbal communication skills.

Get it covered...
In any organisation you are likely to deal face to face with a variety of customers, in a variety of situations. You need to be prepared for anything, from people who just want information to those who have a problem.
What you must do

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

209.1 To communicate effectively with your customer, you must:

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

209.1.2 hold a conversation with your customer that establishes rapport

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

209.1.4 explain your services or products and your organisation’s service offer to your customer clearly and concisely

209.1.5 adapt your communication to meet the individual needs of your customer

209.1.6 anticipate your customer’s requests and needs for information

209.1.7 balance conflicting demands for your attention while maintaining rapport with your current customer

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

What’s good to do?

With face-to-face communication, you must be professional and always aware of the need to impress your customer. The customer will want you to focus on them and you should do this while also being aware of the situation and other customers around you.

209.2 To improve the rapport with your customer through body language, you must:

209.2.1 present a professional and respectful image when dealing with your customer

209.2.2 show an awareness of your customer’s needs for personal space

209.2.3 focus your attention on your customer so that non-verbal signs do not betray disinterest, boredom or irritation

209.2.4 ensure that your customer focus is not disrupted by colleagues

209.2.5 observe all customers and the total customer service situation while maintaining rapport with your current customer

209.2.6 observe your customer to read non-verbal clues about the customer’s wishes and expectations.
UNIT 209 (LEVEL 2 UNIT, 5 CREDITS)
DEAL WITH CUSTOMERS FACE TO FACE

What you must know

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

209.3 To understand how to deal with customers face to face, you must be able to:

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

209.3.2 state the importance of taking the time to listen carefully to what the customer is saying

209.3.3 identify your organisation’s procedures that impact on the way you are able to deal with your customers face to face

209.3.4 describe the features and benefits of your organisation’s services or products

209.3.5 explain your organisation’s service offer and how it affects the way you deal with customers face to face

209.3.6 explain the principles of body language that enable you to interpret customer feelings without verbal communication

209.3.7 explain the difference between behaving assertively, aggressively and passively

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

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

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
This unit is all about the skills you will need to have in order to deal with your customers on the telephone. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

**WHY CUSTOMER SERVICE MATTERS TO... A CONTACT CENTRE ADVISER**

Contact centres can be found in most sectors. Working in a contact centre, the adviser is the first point of contact for the customer. The role may involve advising customers, offering information and resolving problems. Crucially, when dealing with customers on the phone, the contact centre adviser needs to be prepared for anything.
UNIT 210 (LEVEL 2 UNIT, 5 CREDITS)
DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS

What this unit is about

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for the call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem.

This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

AN EXAMPLE

Your organisation has been advertising heavily and you have been taking the calls. You have a customer record management system which gives you the detail you need to ask each caller and on which you record the response. From the questions asked and responses given you decide who to transfer the call to or the information to be sent.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

210.1 can use communication systems effectively
210.2 can establish rapport with customers who are calling
210.3 can deal effectively with customer questions and requests
210.4 know how to deal with incoming telephone calls from customers.

Key words and phrases for this unit

operate telephone system
listen carefully
taking messages
speaking
selecting information
selecting among options (e.g. selecting the appropriate person to pass a caller on to)
recording information

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 105, 201, 203, 204, 205, 207, 212, 217 or 221.
is for rapport

Establishing rapport is about good communication between two people. Good customer service is about building rapport and making sure you and the customer like, understand and trust each other.

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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. You may provide evidence of dealing with customers using landline telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment method key
O Observation  Q Questioning  PE Product Evidence  WT Witness Testimony  PD Professional Discussion
UNIT 210 (LEVEL 2 UNIT, 5 CREDITS)
DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS

What you must cover

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

1 Your evidence must include examples of dealing with customers who:
   a have standard expectations of your organisation’s customer service
   b have experienced difficulties when dealing with your organisation
   c have made a specific request for information
   d need to be informed of circumstances of which they are unaware.

2 Your evidence must include examples of dealings with customers that are:
   a planned
   b unplanned.

Get it covered...

When dealing with customers on the phone you need to be prepared for anything. Whether dealing with incoming or outgoing calls you can’t know what to expect. You can’t see the customers’ facial expressions or body language. So, take notes, listen and confirm. Above all, stay calm even when under pressure!

3 You must provide evidence of dealing with customers by telephone:
   a during routine delivery of customer service
   b during a busy time in your job
   c during a quiet time in your job
   d when people, systems or resources have let you down.

4 You must provide evidence that you have taken messages that are passed on to colleagues:
   a verbally
   b in a form that maintains a permanent record.
What they say...
A customer is the most important visitor on our premises. He is not dependent on us. We are dependent on him. He is not an interruption in our work – he is the purpose of it. He is not an outsider in our business. He is part of it. We are not doing him a favour by serving him. He is doing us a favour by giving us an opportunity to do so. Mahatma Gandhi, Indian spiritual leader and activist

is for listening
Listening is more than hearing. In order to listen effectively, you need to hear, understand and check. Listening is about focusing on the customer, giving them your full attention and letting them finish before you respond. Don’t concentrate on the answer you should give before they’ve finished. You could miss a key point!

---

### What you must do

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

**210.1 To use communication systems effectively, you must:**

| 210.1.1 | operate telecommunication equipment efficiently and effectively |
| 210.1.2 | speak clearly and slowly, and adapt your speech to meet the individual needs of your customer |
| 210.1.3 | listen carefully when collecting information from your customer |
| 210.1.4 | select the information you need to record and store following your organisation’s guidelines |
| 210.1.5 | update your customer records during or after the call to reflect the key points of the conversation |

**210.2 To establish rapport with customers who are calling, you must:**

| 210.2.1 | greet your customer following your organisation’s guidelines |
| 210.2.2 | listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call |
| 210.2.3 | confirm the identity of your customer following organisational guidelines |
| 210.2.4 | use effective and assertive questions to clarify your customer’s requests |

*Continued on next page*
To deal effectively with customer questions and requests, you must:

210.3.1 Identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each.

210.3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer.

210.3.3 Give clear and concise information to customers in response to questions or requests.

210.3.4 Use questions and answers to control the length of the conversation.

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

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

210.3.7 Summarise the outcome of the call and any actions that you or your customer will take as a result.

210.3.8 Check before the call is finished that your customer is content that all their questions or requests have been dealt with.

210.3.9 Complete any follow-up actions agreed during the call.

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

210.3.11 Ensure that promises to call back are kept.

What’s good to do?
Finding out how the telephone system works is crucial. How do you transfer calls or put people on hold? Telephone calls can be stressful without having to find out how to use the equipment. Also don’t be afraid to ask people to repeat what they said – they’d rather you got it right.
What you must know

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

<table>
<thead>
<tr>
<th>210.4</th>
<th>To know how to deal with incoming telephone calls from customers, you must be able to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>210.4.1</td>
<td>describe your organisation’s guidelines and procedures for the use of telecommunication equipment</td>
</tr>
<tr>
<td>210.4.2</td>
<td>explain how to operate the organisation’s telecommunication equipment</td>
</tr>
<tr>
<td>210.4.3</td>
<td>explain the importance of speaking clearly and slowly when dealing with customers by telephone</td>
</tr>
<tr>
<td>210.4.4</td>
<td>describe the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone</td>
</tr>
<tr>
<td>210.4.5</td>
<td>explain the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand</td>
</tr>
<tr>
<td>210.4.6</td>
<td>identify what information is important to note during or after telephone conversations with customers</td>
</tr>
<tr>
<td>210.4.7</td>
<td>describe your organisation’s guidelines and procedures for what should be said during telephone conversations with customers</td>
</tr>
<tr>
<td>210.4.8</td>
<td>explain the importance of keeping your customer informed if they are on hold during a call</td>
</tr>
<tr>
<td>210.4.9</td>
<td>explain the importance of not talking across an open line</td>
</tr>
<tr>
<td>210.4.10</td>
<td>list details that should be included if taking a message for a colleague</td>
</tr>
<tr>
<td>210.4.11</td>
<td>describe your organisation’s guidelines and procedures for taking action to follow up calls made to customers</td>
</tr>
<tr>
<td>210.4.12</td>
<td>describe your organisation’s guidelines for handling abusive calls.</td>
</tr>
</tbody>
</table>

In the know...

Getting the correct message across by telephone can be more difficult than face to face. Customers may not be able to see you but they can tell by the tone of your voice if you are interested. Smile when on the phone, as this really will make a difference to how friendly and engaged you sound.
UNIT 210 (LEVEL 2 UNIT, 5 CREDITS)
DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS

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.

<table>
<thead>
<tr>
<th>Signature of candidate</th>
<th>Date</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Signature of assessor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of assessor</td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signature of IV (if sampled)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of IV</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of EV (if sampled)</td>
<td>Date</td>
</tr>
</tbody>
</table>

is for promises

It is important that when you promise to call a customer back you do so. When a promise is made to call a customer back at an agreed time, the customer is likely to wait at the promised time for the call and be disappointed, even angry, if the call is not made. If you make a promise to call, do so – even if it is to let the customer know you still haven’t got an answer for them.

What they say...

We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.

Jeff Bezos, founder of Amazon.com
This unit is all about being consistent in the standards of service you deliver. The unit sits within the customer service theme of Delivery. This theme covers the organisational behaviours and processes that affect how your customers experience service delivery.

**WHY CUSTOMER SERVICE MATTERS TO... A WAREHOUSE WORKER**

Working in a warehouse involves handling the safe and secure receipt, storage, retrieval and timely despatch of goods – the latter being crucial for the customer. The customer will want the goods when promised, so accurate record keeping is necessary and, increasingly, to improve efficiency, computerised administration and automated storage and retrieval systems are used.
What this unit is about

This unit is all about how you deliver consistent and reliable service to customers.

As well as being good with people, you need to work with your organisation's service systems to meet and, wherever possible, exceed customer expectations.

In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations.

To meet this standard you have to deliver excellent customer service over and over again.

**AN EXAMPLE**

You work in a busy organisation and have a number of customers you are responsible for. They expect a reliable service from you with promises kept, information given to be accurate and updates on what is happening should there be any delays or problems. Your customers expect you to be in control.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

- **212.1** can prepare to deal with customers
- **212.2** can give consistent service to customers
- **212.3** can check customer service delivery
- **212.4** know how to deliver reliable customer service.

Key words and phrases for this unit

- prepare service
- keep promises
- inform customers
- check delivery (e.g. make sure the customer is satisfied by the service you’ve given)
- improve service
- share information

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. **101, 105, 201, 203, 204, 205, 207, 212** or **221**.
**C is for consistency**
Organisations try to deliver the same level of customer service time after time, so that the service customers receive matches what they expect. If customers have received good service in the past, that’s what they expect to receive. If customers have received poor service previously, unfortunately, may be what they expect, so you need to do your best to exceed expectations.

**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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. You must provide evidence that you have worked with different customers who have different needs and expectations.

### 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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**
- **O** Observation
- **Q** Questioning
- **PE** Product Evidence
- **WT** Witness Testimony
- **PD** Professional Discussion
What you must cover

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

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

### R

is for reliability

There are times when customers are more concerned about reliability than about special features. If someone is told they will receive a product by a certain day they want it then – not later! They need to have confidence it will arrive or they will be kept up to date if it can’t arrive on time.

### Get it covered...

In any customer service role you will deal with different customers: those who are internal to your organisation or those who are external – or both! Customers have different needs and expectations. You need to recognise these and check with customers that they are being met. Customer feedback should never be ignored.
What you must do

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

212.1 To prepare to deal with customers, you must:

212.1.1 keep your knowledge of your organisation’s services or products up to date

212.1.2 ensure that the area you work in is tidy, safe and organised efficiently

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

212.2 To give consistent service to customers, you must:

212.2.1 make realistic customer service promises to customers

212.2.2 ensure that your promises balance the needs of your customer and your organisation

212.2.3 keep your promises to customers

212.2.4 inform your customers if you cannot keep your promises due to unforeseen circumstances

212.2.5 recognise when your customers’ needs or expectations have changed and adapt your service to meet the new requirements

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

What’s good to do?

Be organised, prepared and informed at all times. You need to keep your promises so don’t make promises you can’t keep. If circumstances change, be honest and tell your customer—they’d rather know than not. Listen to your customer’s comments—their feedback should be noted and used.

What they say...

It is not the employer who pays the wages. Employers only handle the money. It is the customer who pays the wages.

Henry Ford, pioneer of the assembly-line production method

212.3 To check customer service delivery, you must:

212.3.1 check that the service you have given meets your customers’ needs and expectations

212.3.2 identify when you could have given better service to customers and how your service could have been improved

212.3.3 share information with colleagues and service partners to maintain and improve your standards of service delivery.
In the know...
In delivering customer service you need to know what you can and can’t do. Your organisation will have procedures for everything – from the level of customer service it expects you to deliver, to your responsibilities in relation to health and safety.

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

212.4 To know how to deliver reliable customer service, you must be able to:

212.4.1 describe your organisation’s services or products

212.4.2 explain your organisation’s procedures and systems for delivering customer service

212.4.3 describe methods or systems for measuring an organisation’s effectiveness in delivering customer service

212.4.4 explain your organisation’s procedures and systems for checking service delivery

212.4.5 explain your organisation’s requirements for health and safety in your area of work.

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
This unit is all about how to respond to a diverse range of people in ways that avoid the possibility of discrimination. The unit sits within the customer service theme of Delivery. This theme covers the organisational behaviours and processes that affect how your customers experience service delivery.

**WHY CUSTOMER SERVICE MATTERS TO... A NURSERY NURSE**

Nursery nurses work with babies and young children. They plan and supervise activities such as developing language skills and introduce basic tasks such as dressing. They also observe children and write reports on their progress. The children can come from very different backgrounds or have physical or learning difficulties. They will be a diverse group but all should be given the same respect and consideration.
UNIT 214 (LEVEL 2 UNIT, 5 CREDITS)
RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE

What this unit is about

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate.

Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from assumptions that are drawn from stereotypes rather than from solid evidence obtained from your customer.

This unit is all about how you establish your customer’s expectations and needs in a way that takes full account of them as an individual. The unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

AN EXAMPLE
You work in a leisure centre and notice a woman who you assume has come to collect her grandchildren. You think about it for a moment and realise you may have made an assumption. You ask her how you may help her, and it turns out she wants to join the gym to improve her fitness.

Elements in this unit

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

214.1 can respect customers as individuals and promote equality in customer service
214.2 can adapt customer service to recognise the different needs and expectations of diverse groups of customers
214.3 understand how to recognise diversity when delivering customer service.

Key words and phrases for this unit

verbal clues
non-verbal clues
stereotyping
impression formation
(e.g. don’t judge by first impressions)
inclusive (don’t exclude people, everyone should be treated fairly)
show respect
vary approach

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 105, 201, 203, 205, 208, 209 or 221.
**is for stereotypes**

Sometimes our first impressions of people are not accurate. Try not to judge people without knowing them as this may lead to prejudice on the basis of age, sex, social class or physical appearance. Treat every person as an individual and get to know their personality before making assumptions about them.

**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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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.

**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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**

- **O** Observation  
- **Q** Questioning  
- **PE** Product Evidence  
- **WT** Witness Testimony  
- **PD** Professional Discussion
What you must cover

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

1 Your evidence must show that you have developed your approach to diversity taking account of:
   a relevant legislation
   b sector or industry codes of practice
   c the policies and procedures of your own organisation.

2 You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to four of the following sources of diversity:
   a age
   b disability
   c national origin
   d sexual orientation
   e values
   f ethnic culture
   g education
   h lifestyle
   i beliefs
   j physical appearance
   k social class
   l economic status.

3 You must provide examples of situations when you have adapted your behaviour to:
   a deliberately adopt different approaches to different groups of customers
   b deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements.

Get it covered...
You will deal with a wide variety of people. In delivering customer service, you need to be aware that your organisation may have policies and procedures in place that reflect legislation relating to diversity. It is very important that you observe these.
What you must do

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

214.1 To respect customers as individuals and promote equality in customer service, you must:

214.1.1 observe verbal and non-verbal clues that provide information about your customer’s expectations and needs

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

214.1.3 identify aspects of your customer’s appearance or communication that risk leading you to treat the customer differently

214.1.4 consider aspects of your customer’s appearance or communication in the light of your own beliefs about various groups of people that include your customer

214.1.5 question your customers to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence

214.1.6 adjust your interpretation of the customer’s expectations and wishes as a result of further evidence you have collected by talking to your customer.

What’s good to do?

It is important that you don’t make assumptions about your customers as you could easily cause offence. Show respect for them no matter how they are behaving and always think about the way you have dealt with each customer. Consider whether you could have dealt with them better.

214.2 To adapt customer service to recognise the different needs and expectations of diverse groups of customers, you must:

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

214.2.2 show respect for your customer’s individual beliefs, expectations and needs that may result from their membership of a particular group

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

214.2.4 work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group.
UNIT 214 (LEVEL 2 UNIT, 5 CREDITS)
RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE

What you must know

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

214.3 To understand how to recognise diversity when delivering customer service, you must be able to:

214.3.1 explain the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status

214.3.2 explain why consideration of diversity and inclusion issues affects customer service

214.3.3 describe organisational guidelines to make customer service inclusive for diverse groups of customers

214.3.4 explain how to observe and interpret non-verbal clues

214.3.5 describe how to listen actively for clues about your customer’s expectations and needs

214.3.6 identify techniques for obtaining additional information from customers through tactful and respectful questions

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

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

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
UNIT 105
RECOGNISE AND DEAL WITH CUSTOMER QUERIES, REQUESTS AND PROBLEMS

This unit is all about responding to customer queries, requests and problems. The unit sits within the customer service theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

WHY CUSTOMER SERVICE MATTERS TO... A JEWELLERY DESIGNER
No matter who the customer is, the jewellery designer will work with them, listening carefully and confirming their requirements. A designer should also be able to recognise when a product has not met expectations.
UNIT 105 (LEVEL 1 UNIT, 5 CREDITS)
RECOGNISE AND DEAL WITH CUSTOMER QUERIES, REQUESTS AND PROBLEMS

What this unit is about

No matter how good you are at providing consistent and reliable customer service, some of your customers will, from time to time, expect more. They can signal this in various ways and when they do you must know how to handle it.

Sometimes customers ask different questions and request special treatment. You may be able to help them yourself and you certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. You must recognise that there is a problem and make sure that the appropriate person deals with it.

AN EXAMPLE
While covering the hotel reception a guest telephones to say their breakfast, ordered 30 minutes ago, has still not arrived. To ensure customer satisfaction you agree to talk with the kitchen and confirm that a breakfast will be sent up to their room immediately. You phone the kitchen and carry out a follow-up call to ensure the breakfast has arrived.

Elements in this unit

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

105.1 can recognise and deal with customer queries and requests
105.2 can recognise and deal with customer problems
105.3 know how to recognise and deal with customer queries, requests and problems.

Key words and phrases for this unit

recognise problems
obtain help
pass on a problem
limits of authority
check understanding (check the customer understands what is being done for them)

What have you done in your workplace that is similar? Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 201, 203, 208, 209, 218 or 219.
You should note

1 Wherever possible, your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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.

is for problem

A problem occurs when customer service does not meet customer expectations. Spotting customer service problems early and working to solve them is likely to impress customers and restore satisfaction. Failing to deal with a problem early can result in it becoming a complaint.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment method key

O Observation Q Questioning PE Product Evidence WT Witness Testimony PD Professional Discussion
### UNIT 105 (LEVEL 1 UNIT, 5 CREDITS)
#### RECOGNISE AND DEAL WITH CUSTOMER QUERIES, REQUESTS AND PROBLEMS

<table>
<thead>
<tr>
<th>What you must cover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence reference should be entered in the shaded areas below. You must cover all the points listed.</td>
</tr>
</tbody>
</table>

**1 Your evidence must include examples of problems which are:**
- **a** brought to your attention by customers
- **b** identified first by you and/or by your colleagues.

**2 The problems included in your evidence must include examples of:**
- **a** a difference between customer expectations and what is offered by your organisation
- **b** a problem resulting from a system or procedure failure.

---

**Get it covered...**

Problems arise for many reasons. Once a problem occurs, it’s the way you deal with it that’s important. Find out why it occurred and then consider the various ways it could be dealt with. Any solution needs to satisfy the customer and the organisation.

---

**What they say...**

The magic formula that successful businesses have discovered is to treat customers like guests and employees like people.

Thomas J Peters, author and consultant
What you must do

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

105.1  To recognise and deal with customer queries and requests, you must:

105.1.1 deal with queries and requests from customers in a positive and professional way

105.1.2 seek information or help from a colleague if you cannot answer your customer’s query or request

105.1.3 obtain help from a colleague if you are not able to deal with your customer’s request

105.1.4 always tell your customer what is happening.

What’s good to do?

When a customer has a request or wants information, they expect a knowledgeable response. However, sometimes they have a problem that you may not be able to deal with. It’s important to know who to approach for help and when, rather than trying to deal with a problem that you have never dealt with before, or don’t have the authority within your role to resolve.

105.2  To recognise and deal with customer problems, you must:

105.2.1 recognise when something is a problem from the customer’s point of view

105.2.2 avoid saying or doing anything which may make the problem worse

105.2.3 deal with a difficult customer calmly and confidently

105.2.4 recognise when to pass a problem on to an appropriate colleague

105.2.5 pass the problem on to your colleague with the appropriate information

105.2.6 check that the customer knows what is happening.
UNIT 105 (LEVEL 1 UNIT, 5 CREDITS)
RECOGNISE AND DEAL WITH CUSTOMER QUERIES, REQUESTS AND PROBLEMS

What you must know

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

105.3 To know how to recognise and deal with customer queries, requests and problems, you must be able to:

105.3.1 list who in the organisation is able to give help and information

105.3.2 state the limits of what you are allowed to do

105.3.3 identify what professional behaviour is

105.3.4 describe how to speak to people who are dissatisfied

105.3.5 describe how to deal with difficult people

105.3.6 state what customers normally expect

105.3.7 identify how to recognise a problem from what a customer says or does

105.3.8 describe what kinds of behaviours/actions would make situations worse

105.3.9 list the organisational procedures you must follow when you deal with problems or complaints

105.3.10 identify the types of behaviour that may make a problem worse.

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
UNIT 106
TAKE DETAILS OF CUSTOMER SERVICE PROBLEMS

This unit is all about being the first port of call for customer service problems. The unit sits within the customer service theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

WHY CUSTOMER SERVICE MATTERS TO... A CUSTOMER SERVICE ADVISOR
Customers will always present a customer service advisor with their problems. The advisor will be expected to listen to the problem, gather the details and pass the problem to the relevant person should they be unable to resolve it.
UNIT 106 (LEVEL 1 UNIT, 4 CREDITS)
TAKE DETAILS OF CUSTOMER SERVICE PROBLEMS

What this unit is about

However good the customer service you offer is, some problems will occur. You may not have the authority or experience to deal with the customer’s problem so it is important to collect information on it to pass to those who will deal with it. You will need to be able to identify that there is a problem, discover detailed information about it and pass on the information so that the problem can be tackled.

Essentially, this unit is about how to collect information about a customer service problem, pass it to the right people in the organisation and keep the customer informed about what is being done.

AN EXAMPLE
A customer approaches you about the fact that the flooring he has had delivered is not what he ordered. You take details, noting the order number and the reference codes of the flooring concerned and explain that you would prefer to get the flooring expert to discuss this to ensure the customer gets the right information and advice. You contact the flooring expert and pass the information on keeping the customer informed.

What have you done in your workplace that is similar? Write your answer in this space...

<table>
<thead>
<tr>
<th>Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 102, 103, 104, 105, 201, 202, 203, 205, 209, 210, 211, 212, 216, 218, 219, 220 or 221.</th>
</tr>
</thead>
</table>

Elements in this unit

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

106.1 can respond to customers who raise a problem
106.2 can gather details from customers who raise a problem
106.3 can pass details of problems raised by customers to the colleague who can deal with them
106.4 know how to take details of customer service problems.

Key words and phrases for this unit

- respond calmly
- take details
- clarify
- customer’s expectations
- confirm
- resolve the problem
- pass on the details

…now talk to your assessor about how this could be turned into observed evidence.
You should note

1. Wherever possible, your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (Guidelines for the assessment of simulated activities and a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. You may include evidence that you have passed details to a colleague able to deal with the problem either verbally or in writing.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A

is for attitude

Your attitude can be the difference between a good customer experience and a bad one. Customers expect to see a positive, motivated and professional person. If you have a negative attitude they are likely to have the impression that you are not interested and any interest they may have in your products and services will be lost. Equally, your customer may arrive with a negative attitude and it is your job to turn that to a positive one – not mirror it!

Assessment method key
O Observation Q Questioning PE Product Evidence WT Witness Testimony PD Professional Discussion
## Take Details of Customer Service Problems

### What you must cover

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

<table>
<thead>
<tr>
<th></th>
<th>You need to include evidence of taking details of customer service problems from customers who are:</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>easy to deal with</td>
</tr>
<tr>
<td>b</td>
<td>difficult to deal with</td>
</tr>
</tbody>
</table>

### Get it covered...

In any customer service role it is important to share information. You need to keep people informed – let the customer know what is happening while keeping those in the organisation aware of how the customer feels.

### In the know...

The service offer is communicated to customers through, for example, staff, advertising and public relations. Knowing what the service offer covers is vital. The words you use and what you do need to mirror the service offer.

### is for organisational structure

An organisation can be structured in many ways. There may be many departments or functions doing many different things. However, they will all be structured in such a way that they can work together to a common goal. It is important to understand the structure of your organisation so that you can refer customers to the appropriate person.
What you must do

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

106.1 To respond to customers who raise a problem, you must:

106.1.1 recognise when your customer is raising a problem

106.1.2 respond to your customer calmly and helpfully

106.1.3 take details that will identify your customer.

106.2 To gather details from customers who raise a problem, you must:

106.2.1 ask your customer questions to clarify what has or has not happened to cause a problem

106.2.2 check your understanding of what your customer sees as the problem

106.2.3 ask your customer questions to clarify the customer’s expectations about the service or product that is now causing a problem

106.2.4 note the details of what your customer tells you about the problem

106.2.5 confirm with your customer details of what the customer has told you about the problem.

106.3 To pass details of problems raised by customers to the colleague who can deal with them, you must:

106.3.1 collect details of any reference codes or identifiers which your organisation uses to identify the customer transaction that is now causing a problem

106.3.2 gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications

106.3.3 tell your customer what you will do with the details of the problem so that action is taken

106.3.4 tell your customer what to expect without making customer service promises that may not be met

106.3.5 pass the details to a colleague who is able to deal with the problem.

What’s good to do?

Listen and learn. Listen carefully to what your customer is saying. It is not enough to hear – you must listen and learn.
## UNIT 106 (LEVEL 1 UNIT, 4 CREDITS)
### TAKE DETAILS OF CUSTOMER SERVICE PROBLEMS

### What you must know

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

#### 106.4 To know how to take details of customer service problems, you must be able to:

<table>
<thead>
<tr>
<th>Sub-point</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>106.4.1</td>
<td>Identify customer expectations of the organisation’s services or products that may cause problems if they are not met</td>
</tr>
<tr>
<td>106.4.2</td>
<td>Describe how to respond to customers who raise problems in a way that the customers will find calm and helpful</td>
</tr>
<tr>
<td>106.4.3</td>
<td>Name reference codes or identifiers your organisation uses to identify customers</td>
</tr>
<tr>
<td>106.4.4</td>
<td>Identify questions that can be used to gather information that will be most helpful in resolving a problem</td>
</tr>
<tr>
<td>106.4.5</td>
<td>State details your organisation needs to resolve a problem</td>
</tr>
<tr>
<td>106.4.6</td>
<td>Describe details your organisation uses to identify specific customer transactions</td>
</tr>
<tr>
<td>106.4.7</td>
<td>Name the appropriate colleagues to whom details of problems should be passed</td>
</tr>
<tr>
<td>106.4.8</td>
<td>Identify your organisation’s preferences for the way in which details of problems should be passed on.</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Signature of candidate</th>
<th>Date</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Signature of assessor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of assessor</td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signature of IV (if sampled)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countersignature of IV</td>
<td>Date</td>
</tr>
</tbody>
</table>

| Signature of EV (if sampled) | Date |
UNIT 219

RESOLVE CUSTOMER SERVICE PROBLEMS

This unit is all about dealing with any customer problems as they arise. The unit sits within the customer service theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

WHY CUSTOMER SERVICE MATTERS TO... A POLICE OFFICER

The police deal with the public every day and are faced with many problems. Although no two days are likely to be the same, there are some problems that they face repeatedly. In looking for solutions, they are required to weigh up the options. Keeping the people concerned up to date on how the problem is being solved, whether good news or otherwise, is vital.
UNIT 219 (LEVEL 2 UNIT, 6 CREDITS)
RESOLVE CUSTOMER SERVICE PROBLEMS

What this unit is about

Even if the service you give is excellent, some customers will experience problems. Part of your job is to help to resolve those problems. A problem is anything that means customer expectations are not met. This may be because your customer’s expectations involve more than you can offer or because service procedures haven’t been followed.

As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right.

This unit is particularly important because many customers judge how good the customer service of your organisation is by the way problems are handled.

AN EXAMPLE
A customer phones about damaged goods they have received, explaining that they phoned about this earlier but no one has returned the call. You note the goods sent and realise you have had previous calls from customers on this. You feel this must be a packaging problem and, after dealing with the customer, resolve to let the warehouse know.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

219.1 can spot customer service problems
219.2 can pick the best solution to resolve customer service problems
219.3 can take action to resolve customer service problems
219.4 know how to resolve customer service problems.

Key words and phrases for this unit

listening
recognise repeated problems
share feedback
choose among options (e.g. when faced with a customer problem there may be a number of possible solutions)
work with others
resolve problems
check progress
give explanations

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 105, 201, 203, 205, 206, 210, 212, 219 or 221.
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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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.

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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
</table>

**N**

**is for negotiation**

Negotiation can be the discussion of terms and conditions to reach an agreement or set a contract. Negotiation can also be about bargaining. However, it can also be used to resolve disputes, with discussion taking place before a decision is reached.

**What they say...**

The golden rule for every businessman is this: ‘Put yourself in your customer’s place’. Orison Swett Marden, writer

**Assessment method key**

O Observation  Q Questioning  PE Product Evidence  WT Witness Testimony  PD Professional Discussion
# Unit 219 (Level 2 Unit, 6 Credits)

## Resolve Customer Service Problems

### What you must cover

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

1. **Your evidence must include examples of resolving problems involving each of the following:**
   - a problem first identified by customers
   - a problem identified within the organisation before it has affected your customer
   - a problem caused by differences between your customer’s expectations and what your organisation can offer
   - a problem caused by a system or procedure failure
   - a problem caused by a lack of resources or human error.

2. **Your evidence must prove that you:**
   - supplied relevant information when customers have requested it
   - supplied relevant information when customers have not requested it
   - have used agreed organisational procedures when solving problems
   - have made exceptions to usual practice with the agreement of others.

---

**H is for human error**

We can all make mistakes. Sometimes, though, those mistakes can cause problems that colleagues have to deal with. Care and attention to detail are important in customer service. So, think before you act and remember to do what you said you would do.

---

**Get it covered...**

Problems can be caused by you or your colleagues, the organisational procedures, technical reasons or because customers just expect more than you can give. Don’t wait on a problem being raised. If you see a possible problem arising, look for a solution.
What you must do

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

219.1 To spot customer service problems, you must:

219.1.1 listen carefully to customers about any problems they have raised

219.1.2 ask customers about the problem to check your understanding

219.1.3 recognise repeated problems and alert the appropriate authority

219.1.4 share customer feedback with others to identify potential problems before they happen

219.1.5 identify problems with systems and procedures before they begin to affect customers.

219.2 To pick the best solution to resolve customer service problems, you must:

219.2.1 identify the options for resolving a customer service problem

219.2.2 work with others to identify and confirm the options to resolve a customer service problem

219.2.3 work out the advantages and disadvantages of each option for your customer and your organisation

219.2.4 pick the best option for your customer and your organisation

219.2.5 identify for your customer other ways that problems may be resolved if you are unable to help.

219.3 To take action to resolve customer service problems, you must:

219.3.1 discuss and agree the options for solving the problem with your customer

219.3.2 take action to implement the option agreed with your customer

219.3.3 work with others and your customer to make sure that any promises related to solving the problem are kept

219.3.4 keep your customer fully informed about what is happening to resolve the problem

219.3.5 check with your customer to make sure the problem has been resolved to the customer’s satisfaction

219.3.6 give clear reasons to your customer when the problem has not been resolved to the customer’s satisfaction.

What’s good to do?

A problem arises for a reason. Find out why there is a problem, look for the options and using the best one, resolve it.
What you must know

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

219.4 To know how to resolve customer service problems, you must be able to:

219.4.1 describe organisational procedures and systems for dealing with customer service problems

219.4.2 explain how to defuse potentially stressful situations

219.4.3 describe how to negotiate

219.4.4 identify the limitations of what you can offer your customer

219.4.5 describe types of action that may make a customer problem worse and should be avoided.

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

In the know...

Dealing with customer problems can be stressful for the customer and for you! You need to appreciate that it may seem a minor problem to you, but to your customer it could be major. Learn to talk to your customers, stay calm, discuss a solution and know what you can agree.
This unit is all about how to ensure that your customers can be confident that dealing with you will be a positive experience. The unit sits within 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.

**WHY CUSTOMER SERVICE MATTERS TO... A WAITER**

In a restaurant a waiter will greet the customer and assist them to a table. They will take the order, offering advice on the menu, serve the food as it becomes available and generally be responsible for ensuring the continued satisfaction of customers. Repeat customers are important and the service a customer receives will play a large part in this.
UNIT 221 (LEVEL 2 UNIT, 6 CREDITS)
DEVELOP CUSTOMER RELATIONSHIPS

What this unit is about

When you deal with your customer regularly, you want to make each encounter a good customer experience. The impression you create and the way the service is delivered affects this in the same way as when you deal with a customer only once.

However, a longer-term relationship with a repeat customer also depends on building up your customer’s confidence in the service you offer. Loyalty and a long-term relationship rely on your customer having a realistic view of your organisation’s service and being comfortable with it.

Your customer will return if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with you before.

AN EXAMPLE
A customer visits for a personal financial review. They have various accounts and loans with the bank. By spending time with them to assess immediate, medium- or long-term needs and look at ways in which the bank can offer more beneficial services, you show you are interested in retaining them as a loyal customer and in their repeat business.

Elements in this unit

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

- 221.1 can build your customer’s confidence that the service you give will be excellent
- 221.2 can meet the expectations of your customers
- 221.3 can develop the long-term relationship between your customer and your organisation
- 221.4 know how to develop customer relationships.

Key words and phrases for this unit

customer retention
customer confidence
allocate time
reassure customers
balance expectations
work with others
advise others
added value

What have you done in your workplace that is similar? Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 201, 203, 204, 205, 207, 208, 209 or 303.
**is for loyalty**

Customer loyalty can be built up if the customer experience of an organisation has been good – customers then tend to return. Customer loyalty is valuable to an organisation because it is generally cheaper and easier to do repeat business with an existing satisfied customer than it is to find a new one.

**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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

**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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**

- O Observation
- Q Questioning
- PE Product Evidence
- WT Witness Testimony
- PD Professional Discussion
**What you must cover**

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

1. You must provide evidence of taking actions to meet the needs and expectations of your customer and of your organisation:
   a. without being asked by your customer
   b. at your customer’s request.

2. You must include evidence that you have balanced the needs of your customers and your organisation by:
   a. making use of alternative products or services offered by the organisation
   b. varying the service you would normally offer within organisational guidelines
   c. saying ‘no’ to your customer and explaining the limits of your organisation’s service offer.

---

**is for organisational guidelines**

Organisational guidelines or procedures are written to achieve consistency and ensure everyone carries out a task in the same way. This means customers know what to expect. Follow the guidelines, because if you don’t, you could cause problems for yourself, the organisation and the customer.

---

**Get it covered...**

You can improve the customer service you offer by making changes yourself or as part of a team. Change needs to be managed and you need to be part of the process – using the feedback to create change, helping implement the change, then reviewing customers’ opinions and whether the change has worked.
## What you must do

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

### 221.1 To build your customer’s confidence that the service you give will be excellent, you must:

- **221.1.1** show that you behave assertively and professionally with customers
- **221.1.2** allocate the time you take to deal with your customer following organisational guidelines
- **221.1.3** reassure your customer that you are doing everything possible to keep the service promises made by your organisation.

### 221.2 To meet the expectations of your customers, you must:

- **221.2.1** recognise when there may be a conflict between your customer’s expectations and your organisation’s service offer
- **221.2.2** balance your customer’s expectations with your organisation’s service offer by offering an alternative or explaining the limits of the service offer
- **221.2.3** work effectively with others to resolve any difficulties in meeting your customer’s expectations.

### 221.3 To develop the long-term relationship between your customer and your organisation, you must:

- **221.3.1** give additional help and information to your customer in response to customer questions and comments about your organisation’s services or products
- **221.3.2** discuss expectations with your customer and explain how these compare with your organisation’s services or products
- **221.3.3** advise others of feedback received from your customer
- **221.3.4** identify new ways of helping your customers based on the feedback they have given you
- **221.3.5** identify added value that your organisation could offer to long-term customers.

## What’s good to do?

Customers often give you opinions on the service they receive. Listen to what they say and decide if there is anything you can do personally to improve the service given or if there is something you can suggest to the team.
UNIT 221 (LEVEL 2 UNIT, 6 CREDITS)
DEVELOP CUSTOMER RELATIONSHIPS

What you must know

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

221.4 To know how to develop customer relationships, you must be able to:

221.4.1 describe your organisation’s services or products

221.4.2 explain the importance of customer retention

221.4.3 explain how your own behaviour affects the behaviour of the customer

221.4.4 describe how to behave assertively and professionally with customers

221.4.5 describe how to defuse potentially stressful situations

221.4.6 identify the limitations of your organisation’s customer service offer

221.4.7 compare how customer expectations may change as the customer deals with your organisation

221.4.8 identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations

221.4.9 explain the cost implications of bringing in new customers as opposed to retaining existing customers

221.4.10 identify who to refer to when considering any variation to your organisation’s service offer.

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
This unit is all about how you can develop your personal skills while delivering improved customer service. The unit sits within 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.

**WHY CUSTOMER SERVICE MATTERS TO... A BIKE MECHANIC**

From ensuring that cyclists find the right model to communicating the essentials of bicycle maintenance, bike mechanics offer a service that can be tailored to suit the exact needs of their customers. They also need to have a good idea of the needs and wants of any cyclist—child or adult, amateur or professional.
UNIT 223 (LEVEL 2 UNITS, 6 CREDITS)
DEVELOP PERSONAL PERFORMANCE THROUGH DELIVERING CUSTOMER SERVICE

What this unit is about

Delivering customer service presents many opportunities for learning and for developing personal skills.

This unit is all about how you can improve your customer service performance at the same time as developing your personal skills. Together with a manager or mentor, you will need to plan and then carry out activities that help you learn and develop in your customer service role.

Customer service improvements rely on continuous improvement – this includes improving your own skills.

AN EXAMPLE
Your organisation has a system of obtaining feedback from customers about the performance of its staff. You are required to look at the feedback about your performance and consider what you could do to improve or develop, then discuss it with your manager at your appraisal.

What have you done in your workplace that is similar?
Write your answer in this space...

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

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

223.1 can review performance in your customer service role
223.2 can prepare a personal development plan and keep it up to date
223.3 can undertake development activities and obtain feedback on your customer service performance
223.4 understand how to develop your personal performance through delivering customer service.

Key words and phrases for this unit

personal performance
self-assessment
personal development plan
obtain personal feedback
strengths and weaknesses
self-development
review and update
identify development objectives
review development progress

Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. 101, 210, 212 or 222.
**P**

**is for personal development plan**

This helps you identify any gaps in your skills, as well as areas for improvements. As a minimum, it should cover the action required, the timescales for completion and who is responsible for ensuring the work is completed. A personal development plan should be used to build your skills on an ongoing basis.

---

**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. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a realistic working environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010.)

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

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

4. Your personal development plan must be put on record and agreed with an appropriate person. An ‘appropriate person’ must be one or more of the following: your manager, your supervisor or team leader, a colleague detailed to help you learn, your assessor, your mentor, or someone from your training or personnel department.

---

**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’.

<table>
<thead>
<tr>
<th>Evidence reference</th>
<th>Evidence title</th>
<th>Assessment method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assessment method key**

- **O** Observation
- **Q** Questioning
- **PE** Product Evidence
- **WT** Witness Testimony
- **PD** Professional Discussion
What you must cover

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

1 You must provide evidence that you have developed your personal development plan taking account of:

a information about the knowledge and skills relevant to your customer service role

b your own learning style preferences

c your workload

d opportunities for learning on the job.

What they say...

Profit in business comes from repeat customers, customers that boast about your project or service, and that bring friends with them.

W Edwards Deming, statistician

Get it covered...

You need to be actively involved in the completion of your personal development plan. Assess your strengths and weaknesses, know the skills needed for your job and think about the way you prefer to learn. Discuss and agree any gaps and the improvements needed with your manager, then work on their completion.
### What you must do

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

**223.1** To review performance in your customer service role, you must:

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

223.1.2 identify and review situations from your own positive and negative experiences as a customer

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

**223.2** To prepare a personal development plan and keep it up to date, you must:

223.2.1 agree your strengths, weaknesses and development needs with an appropriate person

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

223.2.3 develop a customer service personal development plan

223.2.4 regularly review your progress towards your objectives with an appropriate person.

**223.3** To undertake development activities and obtain feedback on your customer service performance, you must:

223.3.1 complete development activities identified in your customer service personal development plan

223.3.2 use your day-to-day experiences with your customers and your own experiences as a customer to develop your customer service performance

223.3.3 obtain feedback from an appropriate person about your customer service performance

223.3.4 review and update your customer service personal development plan.

### What’s good to do?

A regular review or appraisal will give feedback on the standard of your work – what is good and what needs to improve or be developed. Use it to develop yourself and your skills, and regularly review how you are doing. Your career progression depends on you growing and developing your skills.
What you must know

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

223.4 To understand how to develop your personal performance through delivering customer service, you must be able to:

223.4.1 describe your organisation’s systems and procedures for developing personal performance in customer service.

223.4.2 explain how your behaviour has an effect on the behaviour of others.

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

223.4.4 describe how to effectively review your personal strengths and development needs.

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

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

223.4.7 explain how to obtain useful and constructive personal feedback from others.

223.4.8 describe how to respond positively to personal feedback.

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
‘Whether you’re dealing with an enquiry over the phone, helping a shopper find the right product, or making a house call to fix a problem, you can be confident that you’re equipped to deliver fantastic customer service.

Good luck as you progress on your customer service journey and career.’

Linda Orr
City & Guilds Customer Service
Strategic Advisor and External Verifier