
LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

Candidate Logbook

Updated
for the
QCF



City & 
Guilds

‘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

ABOUT CITY & GUILDS AND ACKNOWLEDGEMENTS

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MANDATORY UNITS

Customer Service Foundations

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201 Follow the rules to deliver customer service	33

OPTIONAL UNITS

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204 Promote additional services or products to customers	45
205 Process information about customers	51
209 Deal with customers face to face	57
210 Deal with incoming telephone calls from customers	63

Delivery

212 Deliver reliable customer service	71
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Handling Problems

105 Recognise and deal with customer queries, requests and problems	83
106 Take details of customer service problems	89
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Development and Improvement

221 Develop customer relationships	101
223 Develop personal performance through delivering customer service	107

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.

FOREWORD

CAROLINE GREEN

HEAD OF CUSTOMER SERVICES, RYANAIR

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.



‘A vital part of being an effective member of any customer service team is full product knowledge’

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.

MEET THE CONTRIBUTORS

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.'

GETTING STARTED

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.



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.

CUSTOMER SERVICE IN ACTION

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.'

HOW THE NVQ CERTIFICATE WORKS

STARTING THE UNITS

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.

HOW THE NVQ CERTIFICATE WORKS

THE CUSTOMER SERVICE JOURNEY

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.

- 101** Communicate using customer service language
- 201** Follow the rules to deliver customer service

LEVEL

CREDITS

1

4 credits

2

4 credits



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.

- 102** Maintain a positive and customer-friendly attitude
- 103** Adapt your behaviour to give a good customer service impression
- 202** Communicate effectively with customers
- 203** Give customers a positive impression of yourself and your organisation
- 204** Promote additional services or products to customers
- 205** Process information about customers
- 206** Live up to the customer service promise
- 207** Make customer service personal
- 208** Go the extra mile in customer service
- 209** Deal with customers face to face
- 210** Deal with incoming telephone calls from customers
- 211** Make telephone calls to customers
- 303** Deal with customers in writing or electronically
- 304** Use customer service as a competitive tool
- 305** Organise the promotion of additional services or products to customers
- 306** Build a customer service knowledge set

LEVEL

CREDITS

1

5 credits

1

5 credits

2

5 credits

2

5 credits

2

6 credits

2

5 credits

2

6 credits

2

6 credits

2

6 credits

2

5 credits

2

5 credits

2

6 credits

3

6 credits

3

8 credits

3

7 credits

3

7 credits



3: DELIVERY

This theme covers customer service behaviours and processes that have the most effect on the customer experience during customer service delivery.

	LEVEL	CREDITS
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.

	LEVEL	CREDITS
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.

	LEVEL	CREDITS
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
227 Support customers using self-service technology	2	5 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.



Why customer service matters in... corporate hospitality

Demand for corporate hospitality has been buoyed by the 2006 World Cup and Euro 2008 Football Championship in recent years, with the London 2012 Olympic Games likely to take the industry to new heights. From providing gourmet cuisine and good service through to quality entertainment, making a good first impression is crucial as companies look to build important relationships with their customers.

OBSERVATION

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

	1	2	3
101 Communicate using customer service language Give a brief explanation of your customer service role and how you prepare yourself so that you can deliver customer service effectively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
201 Follow the rules to deliver customer service 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OPTIONAL UNITS

2: IMPRESSIONS AND IMAGE

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

102 Maintain a positive and customer-friendly attitude Describe how you show a positive attitude to customers by establishing a rapport.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
103 Adapt your behaviour to give a good customer service impression Describe how you relate to your customers and colleagues, adapting your behaviour to ensure you give a good customer service impression.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
202 Communicate effectively with customers 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
203 Give customers a positive impression of yourself and your organisation Give an example of an activity you are involved in which could demonstrate how you meet, greet and treat your customers following organisation guidelines.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
204 Promote additional services or products to customers 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
205 Process information about customers Give examples of collecting information on new customers and updating information on existing customers, selecting information within organisational procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
206 Live up to the customer service promise Describe the organisation's service offer, vision and promise, and your role in their application.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
207 Make customer service personal Describe situations in which you can make customers feel treated as individuals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Continues on next page

SKILL SCAN/INITIAL ASSESSMENT FORM

LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

CONTINUED

Key: 1 Little or no responsibility 2 Considerable amount of responsibility 3 Total responsibility		1	2	3
208	Go the extra mile in customer service Give an example of when you have gone the extra mile for a customer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
209	Deal with customers face to face Give an example of building rapport when giving face-to-face customer service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
210	Deal with incoming telephone calls from customers Describe how you deal with incoming calls and ensure customer satisfaction over the phone.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
211	Make telephone calls to customers Describe how you plan and make outgoing calls, focusing on the customer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
303	Deal with customers in writing or electronically Describe an occasion when you handled both incoming and outgoing written and electronic communications.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
304	Use customer service as a competitive tool Describe how you use customer service as a tool to compete effectively with other providers of similar services and products.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
305	Organise the promotion of additional services or products to customers Describe how you organise the promotion of additional use of services or products by customers, monitoring the successes and failures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
306	Build a customer service knowledge set Describe how the organisation's customer service knowledge set is built and give an example of how you have added to the information set.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3: DELIVERY

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

104	Do your job in a customer-friendly way Describe how you ensure you create a good first impression, showing consideration to customers while doing your job in a customer-friendly way.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
212	Deliver reliable customer service Give an example of how you deliver consistent customer service within the guidelines and restraints of the organisation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
213	Deliver customer service on your customer's premises Give an example of when you visited a customer's premises and explain how you dealt with the work to be covered and the customer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
214	Recognise diversity when delivering customer service Describe how you establish the customer's needs and expectations in a way that takes full account of them as an individual.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
215	Deal with customers across a language divide Give an example of when you deal with customers whose first language is not your own, explaining how you can deliver an effective customer service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
216	Use questioning techniques when delivering customer service Describe a situation when you use a range of questioning techniques to establish customer needs and build a rapport.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

	1	2	3
217 Deal with customers using bespoke software Describe how you use the bespoke software system in the delivery of effective customer service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
218 Maintain customer service through effective handover 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
307 Deliver customer service using service partnerships Describe who is involved in the service chain and give an example of a positive relationship you have built and nurtured in that chain.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
308 Organise the delivery of reliable customer service Describe how you plan, organise and review the delivery of customer service, explaining how improvements can be made to the information given.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
309 Improve the customer relationship 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
219 Resolve customer service problems Give an example of a customer service problem and the action you took to resolve it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
312 Process customer service complaints Give an example of a complaint you might investigate and the different options you consider for its resolution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Continues on next page

SKILL SCAN/INITIAL ASSESSMENT FORM

LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

CONTINUED

Key: 1 Little or no responsibility 2 Considerable amount of responsibility 3 Total responsibility		1	2	3
223	Develop personal performance through delivering customer service Describe how you currently measure and develop yourself in order to perform effectively in your customer service role.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
224	Support customers using online customer services Describe a situation where you helped a customer to use an online system.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
225	Buddy a colleague to develop their customer service skills Describe a situation where you have worked alongside a colleague providing them with constructive feedback and support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
226	Develop your own customer service skills through self-study 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
227	Support customers using self-service technology 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
313	Work with others to improve customer service Describe how you monitor your own and your team's performance and how you change the way you do things to improve customer service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
314	Promote continuous improvement Give an example of when you identified a potential change to customer service, thought through the consequences of it and then made it work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
315	Develop your own and others' customer service skills Give an example of how you plan to coach and then coach others in developing specific and agreed customer service skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
316	Lead a team to improve customer service Describe how you plan, organise and support your team members to improve overall customer service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
317	Gather, analyse and interpret customer feedback Describe how you plan, gather, analyse and interpret customer feedback.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
318	Monitor the quality of customer service transactions Describe how you prepare to monitor, then monitor and give feedback on the quality of customer service transactions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

Candidate's name					
Name and contact address of witness	Witness status	Professional relationship	Units witnessed	Witness signature	Date

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

Name and contact address of witness	Witness status	Professional relationship	Units witnessed	Witness signature	Date

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

Assessor's signature	Date
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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.

Candidate name		Candidate enrolment number			
Centre name		Centre number			
	Date started	Date achieved	Assessor signature	Candidate signature	IV signature (if sampled)

Mandatory units (both units must be completed)

CUSTOMER SERVICE FOUNDATIONS

101 Communicate using customer service language					
201 Follow the rules to deliver customer service					

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

IMPRESSION AND IMAGE

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

Continues on next page

SUMMARY OF UNIT ACHIEVEMENT

LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

CONTINUED

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

DELIVERY

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

HANDLING PROBLEMS

105 Recognise and deal with customer queries, requests and problems					
106 Take details of customer service problems					

	Date started	Date achieved	Assessor signature	Candidate signature	IV signature (if sampled)
219 Resolve customer service problems					
220 Deliver customer service to difficult customers					
310 Monitor and solve customer service problems					
311 Apply risk assessment to customer service					
312 Process customer service complaints					

DEVELOPMENT AND IMPROVEMENT

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

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

Employer signature	Date
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FILLING OUT THE UNITS

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.

46 LEVEL 2 NVQ CERTIFICATE IN CUSTOMER SERVICE

UNIT 204 (LEVEL 2 UNIT, 6 CREDITS)
PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

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...

I dealt with a customer who wanted to have new curtains made. I showed her the material and used her measurements to price the curtain. I also showed her curtain poles which she bought and then told her about our new curtain fitting service when she asked how the pole should be fixed. She asked a lot of questions about this but when I said there was a discount as she was buying the material and pole from us she agreed to take it.

...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:

- 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/ 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.

ASSESSED 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'.

UNIT 204 PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS 47

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, e-mail, 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'.

Evidence reference	Evidence title	Assessment method
3	<i>Observation of selling additional products on 6th November</i>	O
4	<i>Customer order</i>	PE
6	<i>Witness testimony on meeting sales targets for new product</i>	WT
7	<i>Sales targets</i>	PE
10	<i>Observation of promoting new product to existing customers/general sales 26th Jun</i>	O
12	<i>Professional discussion</i>	PD

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

is for benefits

Products and services have features and benefits. A feature is what the product or service is, while a benefit will improve the quality of life of the person buying it. Benefits are what sell a product or service.

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.

UNIT 204 (LEVEL 2 UNIT, 6 CREDITS)

PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

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

3, 10, 12

b additional use of services or products that your customer has used before.

10, 12

2 Your evidence must show that you:

a identify what your customer wants by seeking information directly

3, 4, 6, 10, 12

b identify what your customer wants from spontaneous customer comments.

3, 10, 12



S
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.



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.



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 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 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.

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:

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

3, 4, 6, 10

204.4.2 explain how the use of additional services or products will benefit your customers

3, 10

204.4.3 explain how your customer's use of additional services or products will benefit your organisation

6, 7, 12

204.4.4 identify the main factors that influence customers to use your services or products

3, 10, 12

204.4.5 explain how to introduce additional services or products to customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products

3, 4, 10

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

3, 10

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

What you must do

Evidence reference should be entered below in the shaded areas. 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

6, 10, 12

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

6, 10, 12

204.1.3 identify appropriate services or products that may interest your customer

3, 10, 12

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

3, 10, 12

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

3, 10, 12

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

3, 10, 12

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

3, 10, 12

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

3, 10, 12



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.

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

10, 12

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

3, 10, 12

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

3, 4, 10, 12

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

3, 4, 10, 12

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

12

WHAT YOU MUST KNOW

This is 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.

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



UNIT 101

COMMUNICATE USING CUSTOMER SERVICE LANGUAGE

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.

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.



is for role

In every organisation people have specific roles. It is important to understand the structure of your organisation – who does what and how they can help you. There will be times when you will need information or help in dealing with a customer's query or problem and it is vital you know who to approach.

Assessed evidence

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

Evidence reference	Evidence title	Assessment method

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

UNIT 101 (LEVEL 1 UNIT, 4 CREDITS)

COMMUNICATE USING CUSTOMER SERVICE LANGUAGE

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.



What they say...

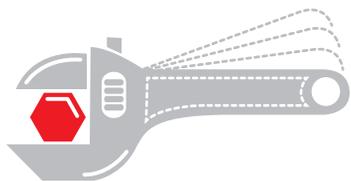
There is only one boss. The customer. And he can fire everybody in the company from the chairman down, simply by spending his money somewhere else.
Sam Walton, founder of Wal-Mart Stores

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'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:

101.3.1 identify the differences between an internal customer and an external customer

101.3.2 list your organisation's services or products

101.3.3 describe the connection between customer expectations and customer satisfaction in customer service

101.3.4 describe why organisation procedures are important to good customer service

101.3.5 explain why teamwork is central to good customer service

101.3.6 identify the service offer of your organisation

101.3.7 identify the part you play in delivering customer service

101.3.8 identify who your customers are

101.3.9 describe the main characteristics of typical customers that you deal with

101.3.10 identify what impresses your customers and what annoys your customers

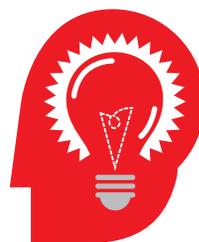
101.3.11 identify who's who and who does what to deliver customer service in your organisation

101.3.12 describe the kinds of information you need to give good customer service to customers

101.3.13 explain how to find information about your organisation's services and products

101.3.14 list typical customer service problems in your work and who should be told about them

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



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.

UNIT 101 (LEVEL 1 UNIT, 4 CREDITS)

COMMUNICATE USING CUSTOMER SERVICE LANGUAGE

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



What they say...

Every company's greatest assets are its customers, because without customers there is no company.

Michael LeBoeuf, author



UNIT 201

FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 203

GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

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.

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'.

Evidence reference	Evidence title	Assessment method

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

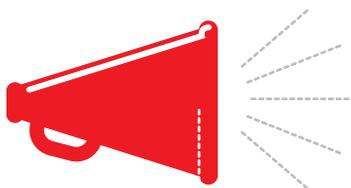
c during a quiet time in your job

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

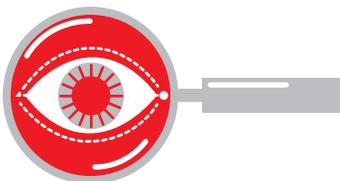
b applying the conventions and rules appropriate to the method of communication you have chosen.



What they say...

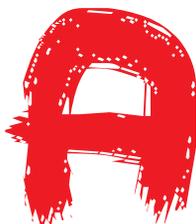
Business is not just doing deals; business is having great products, doing great engineering, and providing tremendous service to customers. Finally, business is a cobweb of human relationships.

H Ross Perot, founder of EDS



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.



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 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

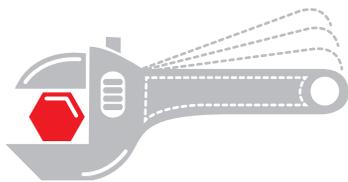
203.1.3 communicate with your customer in a way that makes them feel valued and respected

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

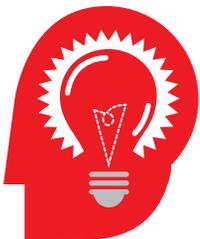
Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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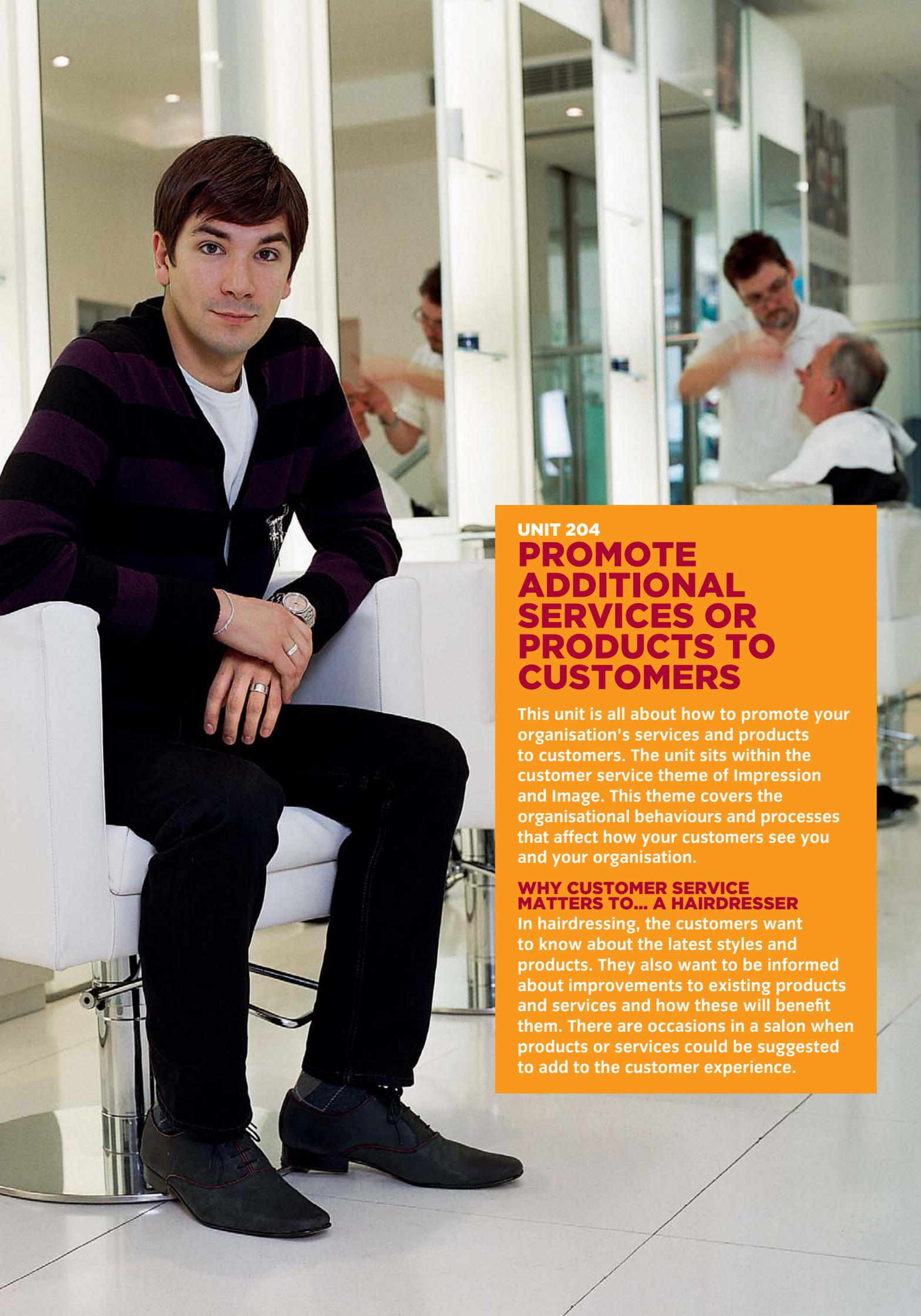
Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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In the know...

Customers expect a certain standard of behaviour and appearance. Find out the dress code and how you are expected to deliver customer service.



UNIT 204

PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

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.

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.

B

is for benefits

Products and services have features and benefits. A feature is what the product or service is, while a benefit will improve the quality of life of the person buying it. Benefits are what sell a product or service.

Assessed evidence

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

Evidence reference	Evidence title	Assessment method

Assessment method key

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

UNIT 204 (LEVEL 2 UNIT, 6 CREDITS)

PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

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:

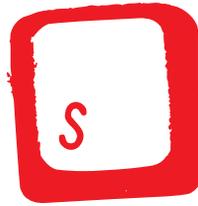
- a use of services or products that are new to your customer

- b additional use of services or products that your customer has used before.

2 Your evidence must show that you:

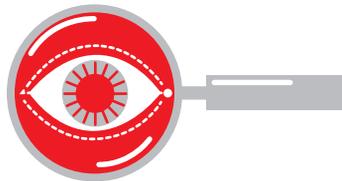
- a identify what your customer wants by seeking information directly

- b identify what your customer wants from spontaneous customer comments.



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.



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 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.

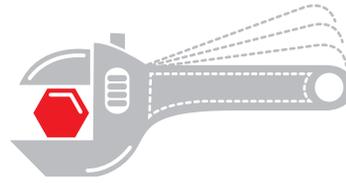
204.2 To inform customers about additional services or products, you must:

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.



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.

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.

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:

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

204.4.2 explain how the use of additional services or products will benefit your customers

204.4.3 explain how your customer's use of additional services or products will benefit your organisation

204.4.4 identify the main factors that influence customers to use your services or products

204.4.5 explain how to introduce additional services or products to customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products

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

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 205

PROCESS INFORMATION ABOUT CUSTOMERS

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.



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'.

Evidence reference	Evidence title	Assessment method

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:

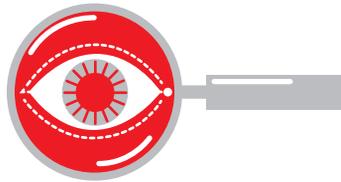
a new customers

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

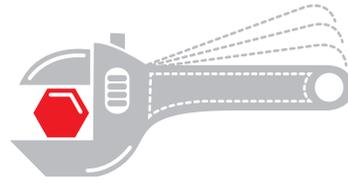
205.2.2 select and retrieve relevant information for customers or colleagues following your organisation's guidelines.

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 209

DEAL WITH CUSTOMERS FACE TO FACE

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.

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.



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.

Assessed evidence

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

Evidence reference	Evidence title	Assessment method

Assessment method key

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

UNIT 209 (LEVEL 2 UNIT, 5 CREDITS)

**DEAL WITH CUSTOMERS
FACE TO FACE**

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

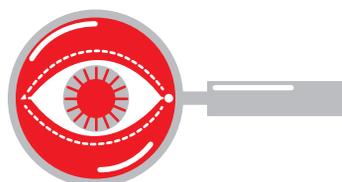
c during a quiet time in your job

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

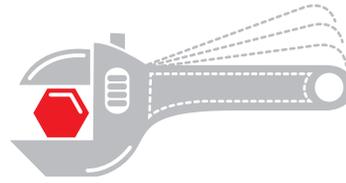
209.1.4 explain your services or products and your organisation's service offer to your customer clearly and concisely

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 210

DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS

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.



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'.

Evidence reference	Evidence title	Assessment method

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

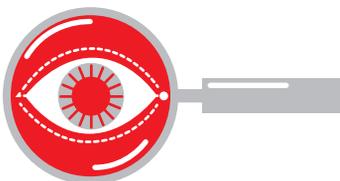
- c have made a specific request for information

- 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

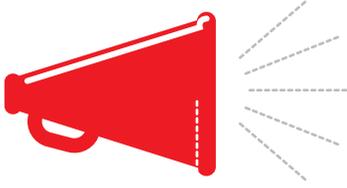
- c during a quiet time in your job

- 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

UNIT 210 (LEVEL 2 UNIT, 5 CREDITS)

DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS*Continued from previous page***210.3 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

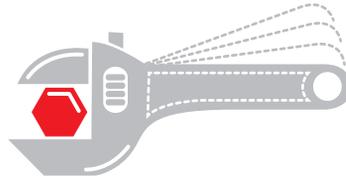
210.3.3 give clear and concise information to customers in response to questions or requests

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

*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.

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 you must know

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

210.4 To know how to deal with incoming telephone calls from customers, you must be able to:

210.4.1 describe your organisation's guidelines and procedures for the use of telecommunication equipment

210.4.2 explain how to operate the organisation's telecommunication equipment

210.4.3 explain the importance of speaking clearly and slowly when dealing with customers by telephone

210.4.4 describe the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone

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

210.4.6 identify what information is important to note during or after telephone conversations with customers



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.

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

210.4.8 explain the importance of keeping your customer informed if they are on hold during a call

210.4.9 explain the importance of not talking across an open line

210.4.10 list details that should be included if taking a message for a colleague

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

210.4.12 describe your organisation's guidelines for handling abusive calls.

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.

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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P

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

UNIT 212

DELIVER RELIABLE CUSTOMER SERVICE

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.





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 that, 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'.

Evidence reference	Evidence title	Assessment method

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

UNIT 212 (LEVEL 2 UNIT, 5 CREDITS)

**DELIVER RELIABLE
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 that you deliver excellent customer service:

a during routine delivery of customer service

b during a busy time in your job

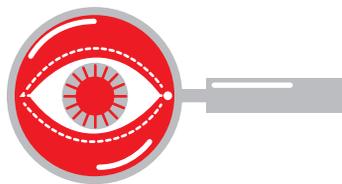
c during a quiet time in your job

d when people, systems or resources have let you down.



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

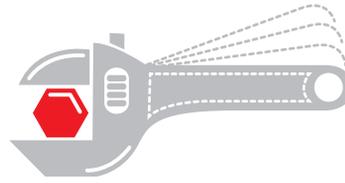
212.2.2 ensure that your promises balance the needs of your customer and your organisation

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

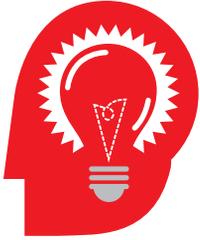
212.3 To check customer service delivery, you must:

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.

UNIT 212 (LEVEL 2 UNIT, 5 CREDITS)

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 214

RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE

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.





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'.

Evidence reference	Evidence title	Assessment method

Assessment method key

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

UNIT 214 (LEVEL 2 UNIT, 5 CREDITS)

RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE

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

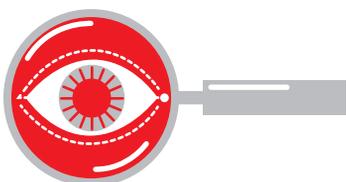
k social class

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

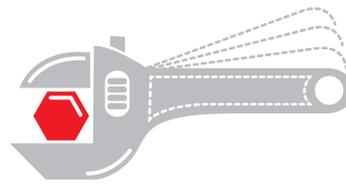
214.1.2 identify and avoid features of stereotypes that might be applied to your customer that could carry the risk of causing offence

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

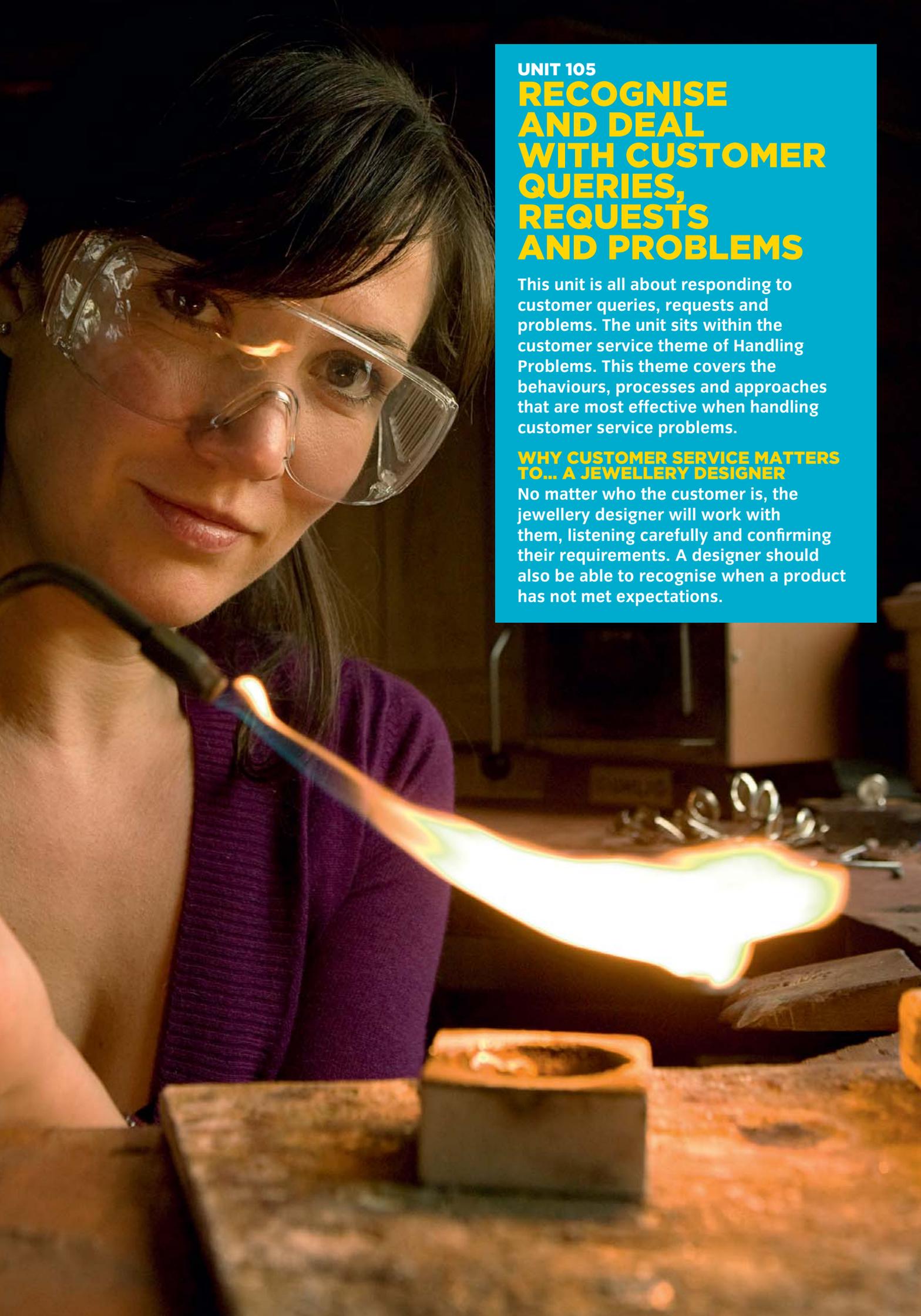
Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 105

RECOGNISE AND DEAL WITH CUSTOMER QUERIES, REQUESTS AND PROBLEMS

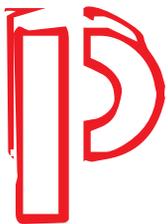
This unit is all about responding to customer queries, requests and problems. The unit sits within the customer service theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

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.

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 5/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'.

Evidence reference	Evidence title	Assessment method

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

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 problems which are:

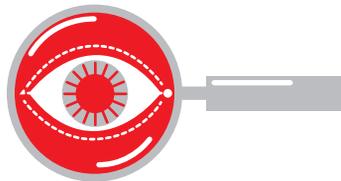
- a brought to your attention by customers

- b identified first by you and/or by your colleagues.

2 The problems included in your evidence must include examples of:

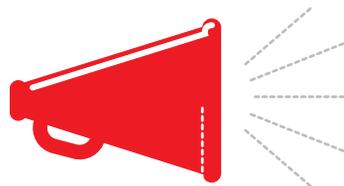
- a a difference between customer expectations and what is offered by your organisation

- 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.

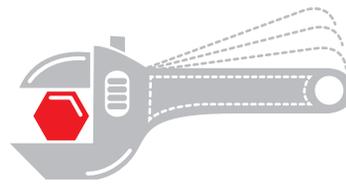
105.1 To recognise and deal with customer queries and requests, you must:

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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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.

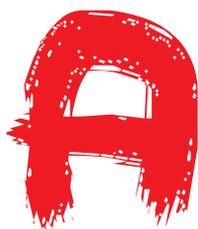
WHY CUSTOMER SERVICE MATTERS TO... A CUSTOMER SERVICE ADVISOR

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.



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.



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!

Assessed evidence

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

Evidence reference	Evidence title	Assessment method

Assessment method key

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

UNIT 106 (LEVEL 1 UNIT, 4 CREDITS)

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.

1 You need to include evidence of taking details of customer service problems from customers who are:

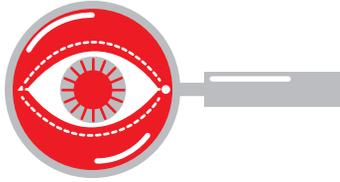
a easy to deal with

b difficult to deal with.



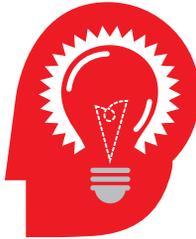
is for organisational structure

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.



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.

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:

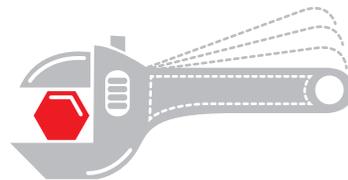
106.2.1 ask your customer questions to clarify what has or has not happened to cause a problem

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.



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.

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.

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:

106.4.1 identify customer expectations of the organisation's services or products that may cause problems if they are not met

106.4.2 describe how to respond to customers who raise problems in a way that the customers will find calm and helpful

106.4.3 name reference codes or identifiers your organisation uses to identify customers

106.4.4 identify questions that can be used to gather information that will be most helpful in resolving a problem

106.4.5 state details your organisation needs to resolve a problem

106.4.6 describe details your organisation uses to identify specific customer transactions

106.4.7 name the appropriate colleagues to whom details of problems should be passed

106.4.8 identify your organisation's preferences for the way in which details of problems should be passed on.

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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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 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 a problem first identified by customers

b a problem identified within the organisation before it has affected your customer

c a problem caused by differences between your customer's expectations and what your organisation can offer

d a problem caused by a system or procedure failure

e a problem caused by a lack of resources or human error.

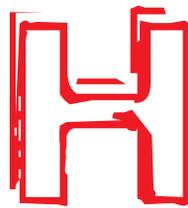
2 Your evidence must prove that you:

a supplied relevant information when customers have requested it

b supplied relevant information when customers have not requested it

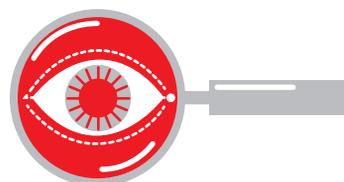
c have used agreed organisational procedures when solving problems

d have made exceptions to usual practice with the agreement of others.



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

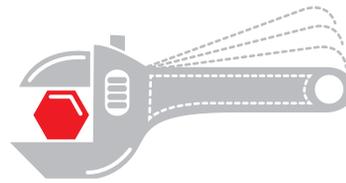
219.1.5 identify problems with systems and procedures before they begin to affect customers.

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



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.

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.

UNIT 219 (LEVEL 2 UNIT, 6 CREDITS)

RESOLVE CUSTOMER SERVICE PROBLEMS

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:

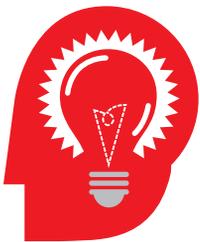
219.4.1 describe organisational procedures and systems for dealing with customer service problems

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.



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.

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 221

DEVELOP CUSTOMER RELATIONSHIPS

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.



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'.

Evidence reference	Evidence title	Assessment method

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

UNIT 221 (LEVEL 2 UNIT, 6 CREDITS)

DEVELOP CUSTOMER RELATIONSHIPS

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

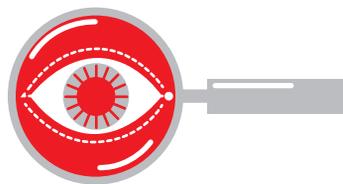
- b varying the service you would normally offer within organisational guidelines

- 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

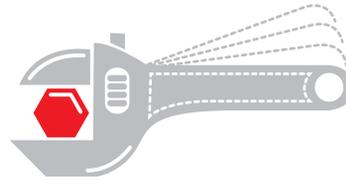
221.1.3 reassure your customer that you are doing everything possible to keep the service promises made by your organisation.

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.



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.

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.

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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UNIT 223

DEVELOP PERSONAL PERFORMANCE THROUGH DELIVERING CUSTOMER SERVICE

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.

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'.

Evidence reference	Evidence title	Assessment method

Assessment method key

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

UNIT 223 (LEVEL 2 UNIT, 6 CREDITS)

DEVELOP PERSONAL PERFORMANCE THROUGH DELIVERING 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 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

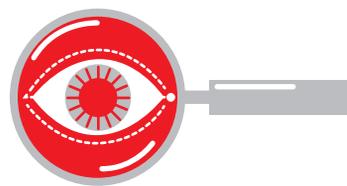
- d opportunities for learning on the job.



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.

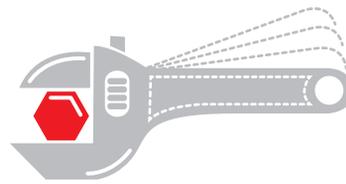
223.2 To prepare a personal development plan and keep it up to date, you must:

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.



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.

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.

UNIT 223 (LEVEL 2 UNIT, 6 CREDITS)

DEVELOP PERSONAL PERFORMANCE THROUGH DELIVERING CUSTOMER SERVICE

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

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of EV (if sampled)	Date
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‘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

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