Level 4 NVQ Diploma in Customer Service (4430-04)

Qualification handbook for centres

500/8817/8

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Level 4 NVQ Diploma in Customer Service (4430-04)

Qualification handbook for centres

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1   Introduction to the qualification

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

Qualification title and level	Level 4 NVQ Diploma in Customer Service
City & Guilds qualification number	4430-04
Qualification accreditation number	500/8817/8
Last registration date	31/07/2014
Last certification date	31/07/2017

The level 4 City & Guilds NVQ Diploma in Customer Service qualification provides opportunities to recognise the development and implementation of customer service strategies at an operational level. Candidates may not necessarily be responsible for other people within the workplace as their main role will be to ensure effective processes and practice are in place to achieve and continually improve customer service across an entire team, department or organisation, managing change as necessary. The flexible structure of the qualification enables individuals to develop the skills to manage and resolve challenging issues raised by customers. They may implement customer service management software to support their strategy.

Contacting the Sector Skills Body (SSB)
The Council for Administration (CFA)
Tel: 020 7091 9620
Website: **www.cfa.uk.com**

The Institute of Customer Service (ICS)
Tel: 01206 571 716
Fax: 01206 546 688
Website: **www.instituteofcustomerservice.com**

1.1 Qualification structure

To achieve the **Level 4 NVQ Diploma in Customer Service**, learners must achieve:

Minimum Credit Value: 67
A minimum of **35 credits** must be at **level 4**
The learner must achieve **20 credits** from the **Mandatory Units**.
A further **47 credits** must be achieved by completing a **minimum of one unit** from each **Optional Group**.

The diagram below illustrates the unit titles, the credit value of each unit and the title of the qualification which will be awarded to candidates successfully completing the required combination of units and/or credits.

City & Guilds unit number	Mandatory Units - Customer Service Foundations	QCF Level	QCF Credit	GLH
4430-401	Demonstrate understanding of customer service management (F5)	4	10	65
4430-402	Follow organisational rules, legislation and external regulations when managing customer service (F6)	4	10	65

City & Guilds unit number	Optional Units - Impression and Image	QCF Level	QCF Credit	GLH
4430-303	Deal with customers in writing or electronically (A13)	3	6	40
4430-304	Use customer service as a competitive tool (A14)	3	8	53
4430-305	Organise the promotion of additional services or products to customers (A15)	3	7	47
4430-306	Build a customer service knowledge set (A16)	3	7	47
4430-403	Champion customer service (A17)	4	10	67
4430-404	Make customer service environmentally friendly and sustainable (A18)	4	11	73

City & Guilds unit number	Optional Units - Delivery	QCF Level	QCF Credit	GLH
4430-307	Deliver customer service using service partnerships (B9)	3	6	40
4430-308	Organise the delivery of reliable customer service (B10)	3	6	40
4430-309	Improve the customer relationship (B11)	3	7	47
4430-405	Maintain and develop a healthy and safe customer service environment (B12)	4	8	53
4430-406	Plan, organise and control customer service operations (B13)	4	10	67
4430-407	Review the quality of customer service (B14)	4	8	53
4430-408	Build and maintain effective customer relations (B15)	4	8	53
4430-409	Deliver seamless customer service with a team (B16)	4	8	53

City & Guilds unit number	Optional Units - Handling Problems	QCF Level	QCF Credit	GLH
4430-310	Monitor and solve customer service problems (C5)	3	6	40
4430-311	Apply risk assessment to customer service (C6)	3	10	67
4430-312	Process customer service complaints (C7)	3	6	40
4430-410	Handle referred customer complaints (C8)	4	10	67

City & Guilds unit number	Optional Units - Development and Improvement	QCF Level	QCF Credit	GLH
4430-313	Work with others to improve customer service (D8)	3	8	53
4430-314	Promote continuous improvement (D9)	3	7	47
4430-315	Develop your own and others' customer service skills (D10)	3	8	53
4430-316	Lead a team to improve customer service (D11)	3	7	47
4430-317	Gather, analyse and interpret customer feedback (D12)	3	10	67
4430-318	Monitor the quality of customer service transactions (D13)	3	7	47
4430-411	Implement quality improvements to customer service (D14)	4	10	67
4430-412	Plan and organise the development of customer service staff (D15)	4	9	60
4430-413	Develop a customer service strategy for a part of an organisation (D16)	4	11	73
4430-414	Manage a customer service award programme (D17)	4	7	47
4430-415	Apply technology or other resources to improve customer service (D18)	4	11	73
4430-416	Review and re-engineer customer service processes (D19)	4	11	73
4430-417	Manage customer service performance (D20)	4	7	47

1.2   Opportunities for progression

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

- Institute of Leadership and Management (ILM) qualifications
- NVQ/SVQs in other work-related areas (for example Administration, Retail, Contact Centres Accounting, IT and other technical sectors)

1.3   Qualification support materials

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

Description	How to access
Candidate logbook / recording forms	**TBA**
Centre guide	**www.cityandguilds.com**
Promotional materials	**www.cityandguilds.com**

2   Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 4 NVQ in Customer Service (4543-04) will be given automatic approval for the new Level 4 NVQ Diploma in Customer Service (4430-04). Existing sanctions will apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1   Resource requirements

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors, internal verifiers and external verifiers

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

- have a thorough knowledge of the Level 4 National Occupational Standards for Customer Service, appropriate to the Level they are working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service NVQ at the Level they are working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and NVQs at the Level they are working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

The Assessor, IV and EV working at Level 4 must have:	This can be evidenced by:	A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 4 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the ICS		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the ICS Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	joining the ICS	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 4	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVS and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Employer Direct Model

The ICS feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs and NVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the ICS works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The organisation must:

- liaise with City & Guilds to attain approval to offer this model prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with City & Guilds
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

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

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

Assessment of the Level 4 NVQ Diploma in Customer Service Units should be carried out in a **real job (either paid or voluntary**). Simulation and Realistic Working Environment is not accepted at this level by the Institute of Customer Service Assessment Strategy.

Age restrictions

This qualification is not approved for use by candidates under the age of 18 and City & Guilds cannot accept any registrations for candidates in this age group.
There are no other age limits attached to candidates undertaking this qualification unless it is a legal requirement of the process or the environment.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:
- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

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

Centres may design course programmes of study in any way which:
- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:
- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

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

For further information to assist with the planning and development of the programme, please refer to the following:
- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen **www.smartscreen.co.uk**
- Useful material is available from **www.instituteofcustomerservice.com**

4   Assessment

4.1   Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

4.2   Evidence requirements

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

4.3   Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: **www.cityandguilds.com/eportfolios**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

4.4   Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the Institute of Customer Service (ICS) March 2010 and can be located on their website **www.instituteofcustomerservice.com**

5 Units

Availability of units

The Customer Service units for this qualification follow.

The learning outcomes and assessment criteria are also viewable on the National Database of Accredited Qualifications (NDAQ) **www.accreditedqualifications.org.uk**

Structure of units

The units in this qualification are written in a standard format and comprise the following:
- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a Standard Setting Body (SSB)
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- evidence requirements.

Unit 401   Demonstrate understanding of customer service management

Level: 4
Credit value: 10
NDAQ number: J/601/1630

Unit aim

This unit covers the key principles of customer service that influence how it is managed and the links between management responsibilities and those key principles. The unit also recognises that knowledge and understanding of customer service principles and systems required in a management role may not be as detailed as that required in a delivery role. Instead, knowledge and understanding must relate clearly to a more strategic appreciation of the principles of customer service. This unit provides the opportunity to demonstrate the knowledge and understanding that is needed to be effective in customer service management.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Demonstrate an understanding of the principles of customer service that influence the way it is managed
2   Demonstrate how their management responsibilities link with customer service principles
3   Understand how their management responsibilities link with customer service principles

Guided learning hours

It is recommended that 65 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit F5 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 401 Demonstrate understanding of customer service management

Outcome 1: Demonstrate an understanding of the principles of customer service that influence the way it is managed

Assessment Criteria

The learner can:

1.1 exercise customer service management responsibility with consideration for their organisation's service offer, customer expectations and resources

1.2 supervise and develop staff skills in the delivery of customer service

1.3 contribute to the development of customer service policies, culture and ethics in their organisation

1.4 evaluate options for technology that will improve customer service delivery

1.5 carry out risk assessment when dealing with customer service problems

Outcome 2: Demonstrate how their management responsibilities link with customer service principles

Assessment Criteria

The learner can:

2.1 display leadership in a customer service role

2.2 contribute to recruitment and development of staff with appropriate customer service skills

2.3 monitor and maintain effective customer service in their organisation

2.4 promote improvement of customer service in their organisation

Outcome 3: Understand how their management responsibilities link with customer service principles

Assessment Criteria

The learner can:

3.1 describe the customer service management role and responsibilities in relation to their organisation's service offer

3.2 describe the customer service management role and responsibilities in relation to customer expectations and customer satisfaction

3.3 explain how effective customer service depends on a combination of organisational systems and the skills of those responsible for customer service delivery

3.4 explain how organisational systems balance customer satisfaction, financial considerations and the requirements of legislation and regulation

3.5 explain how effective customer service delivery by staff involves a combination of skills acquired through training and experience and personality

3.6   compare the options for monitoring customer service performance and the benefits and drawbacks of each option

3.7   explain the use of customer service as a competitive tool by the commercial sector and its use as a contribution to best value in the public or third sectors

3.8   describe the key features of a customer service culture in an organisation

3.9   explain how risk assessment can be applied to customer service situations when dealing with customer service problems

3.10   evaluate options for making use of technology to improve customer service delivery

3.11   describe ways in which an organisation can seek continuous improvement in its customer service

3.12   describe ways in which the ethical and values base of an organisation's approach to customer service are demonstrated and maintained

3.13   explain the nature of their responsibilities for customer service resources and systems in their organisation

3.14   describe their leadership role in customer service delivery

3.15   identify the key skills and attributes to be sought when recruiting for a person to deliver customer service in their organisation

3.16   describe options for training and development of their organisation's staff in customer service and the benefits and drawbacks of each option

3.17   identify qualifications in customer service that may be appropriate for the development of people in their organisation

3.18   explain the importance of the steps they take to monitor and maintain effective delivery of customer service in their organisation

3.19   describe ways in which they promote continuous improvement within their organisation

3.20   explain the importance of establishing a strong network of contacts with similar interests in customer service

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

3   You must provide evidence that shows you have done this over a sufficient period of time 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

Unit 402 Follow organisational rules, legislation and external regulations when managing customer service

Level: 4
Credit value: 10
NDAQ number: D/601/1634

Unit aim

This unit is about management responsibilities in a role that is directly related to customer service generally involving actions and a set of knowledge and understanding of legislation and regulation that impact on the management function and the way it is fulfilled. It is about observing the law and rules and what the individual needs to know and understand in order to manage customer service processes effectively.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Follow their organisation's rules and culture related to customer service
2 Follow legislation and external regulation when managing customer service
3 Understand the rules to follow when managing customer service

Guided learning hours

It is recommended that 65 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit F6 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 402 Follow organisational rules, legislation and external regulations when managing customer service

Outcome 1: Follow their organisation's rules and culture related to customer service

Assessment Criteria

The learner can:

1.1 contribute to the development of customer service in their organisation within the organisation's rules and culture

1.2 act within their own authority to promote customer service in their organisation

1.3 use appropriate sources of information about organisational rules, policies and procedures that relate to customer service

1.4 deal with customer service problems and complaints within organisational rules

Outcome 2: Follow legislation and external regulation when managing customer service

Assessment Criteria

The learner can:

2.1 manage customer service activities following legislation and external regulation

2.2 assess the risks resulting from non-compliance with legislation and external regulation when supervising the delivery of customer service

2.3 contribute to development of customer service policies and strategy that comply with legislation and external regulation

Outcome 3: Understand the rules to follow when managing customer service

Assessment Criteria

The learner can:

3.1 explain the steps that managers can take to encourage development of a customer service culture in their organisation

3.2 describe the importance of influencing skills for the development of customer service in their organisation

3.3 identify the opportunities provided and constraints placed on customer service delivery by the policies and procedures of their organisation

3.4 describe the structure of authority in their organisation relating to customer service management

3.5   explain the limits of their own authority and who else in the organisation needs to be involved if they cannot authorise customer service management actions alone

3.6   explain how they should involve service partners in customer service management actions

3.7   identify the sources of information about organisational rules, policies and procedures that relate to customer service

3.8   explain their organisation's definition of a complaint and their responsibility in connection with complaints

3.9   explain the structure of legislation and external regulation that impacts on the customer service of their organisation

3.10   explain the importance of the regulatory authority of different legal and regulatory bodies for their organisation

3.11   explain the risks for their organisation presented by non-compliance with different legal and regulatory bodies

3.12   describe the level of knowledge and understanding needed by people in their organisation involved in customer service delivery regarding relevant legislation and external regulation

3.13   explain the importance of taking full account of legal and regulatory requirements when planning customer service developments

3.14   describe the relationship between customer service strategy and compliance

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

3   You must provide evidence that shows you have done this over a sufficient period of time 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

Unit 403 Champion customer service

Level: 4
Credit value: 10
NDAQ number: T/601/1235

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Promote the importance and benefits of customer service
2   Provide advice and information on customer service issues
3   Know how to champion customer service

Guided learning hours

It is recommended that 67 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A17 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 403   Champion customer service

Outcome 1: Promote the importance and benefits of customer service

Assessment Criteria

The learner can:

1.1   explain the role of customer service within their organisation's strategic and business plans

1.2   monitor developments in their organisation in order to identify those important to customer service

1.3   analyse the implications of these customer service developments

1.4   question and challenge developments from the customer's standpoint

1.5   use their influence to ensure that developments improve customer service

Outcome 2: Provide advice and information on customer service issues

Assessment Criteria

The learner can:

2.1   inform customer that they can provide customer service advice and information

2.2   respond to requests for customer service advice and information

2.3   carry out any necessary research to enhance or verify the advice and information they are giving

2.4   communicate customer service advice and information effectively

2.5   help others to explore the implications of their advice and information for their own work and identify actions that the advice and information might prompt

2.6   monitor how effective their advice and information has been

2.7   review the way they collect information, formulate advice and communicate it to others

Outcome 3: Know how to champion customer service

Assessment Criteria

The learner can:

3.1   describe the processes for decision making within their organisation and who is involved

3.2   explain how to monitor developments within their organisation

3.3   describe how to use their influence and authority to affect decision making

3.4   describe the types of developments that are likely to affect customer service and how to analyse the implications for customer service

3.5   explain the importance of empathising with customers and how to represent their viewpoint in a constructive way

3.6   explain how to identify when others need advice and information on customer service issues

3.7   explain how to use different types of research to support their advice and information on customer service

3.8   explain how to apply their advice and information in practice

3.9   explain how to monitor the effect of their advice and information

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   You must provide evidence that you have monitored developments that, in relation to your own area of responsibility, are:

   a   strategic

   b   operational.

5   Your evidence must show that you have analysed the implications of customer service developments for:

   a   the quality of services or products

   b   the way services or products are delivered

   c   customer relationships.

6   You must provide evidence that you have responded to requests for information and advice from two of these groups:

   a   front line staff

   b   supervisors or team leaders

   c   senior managers

   d   colleagues in other departments

   e   service partners.

7   You evidence must show that you have provided information and advice about:

   a   the quality of services or products

   b   the way services or products are delivered

   c   customer relationships.

8   Your evidence must show that you have communicated customer service advice and information using two different communication media.

Unit 404 Make customer service environmentally friendly and sustainable

Level: 4
Credit value: 11
NDAQ number: F/601/1237

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1   Review and monitor environmental and sustainability aspects of customer service
2   Promote environmental and sustainable aspects of customer service in their organisation
3   Understand how to make customer service environmentally friendly and sustainable

Guided learning hours

It is recommended that 73 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit A18 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 404 Make customer service environmentally friendly and sustainable

Outcome 1: Review and monitor environmental and sustainability aspects of customer service

Assessment Criteria

The learner can:

1.1 identify their organisation's policies on customer service and on the environment and trace links between the two

1.2 identify their organisation's policy on energy management and carbon emissions and their key links with customer service systems

1.3 identify their organisation's policy on waste management and its key links with customer service systems

1.4 carry out a systematic review of their organisation's customer service systems to identify opportunities for environmental improvements

1.5 identify service partnerships that affect their organisation's environmental profile and what they might do to improve it

1.6 develop an action plan to promote environmental actions and improvements in their organisation's customer service delivery

Outcome 2: Promote environmental and sustainable aspects of customer service in their organisation

Assessment Criteria

The learner can:

2.1 make links between their organisation's environmental policies and customer service delivery routines

2.2 encourage those involved in customer service delivery to promote an environmental approach by customers

2.3 identify and promote ways to minimise resource use in customer service delivery

2.4 communicate their organisation's environmental policies to service partners including suppliers and encourage their participation in environmental improvements

2.5 communicate their organisation's environmental policies to customers and encourage their participation in environmental improvements

2.6 develop staff awareness of environmental matters and ways they can contribute to environmentalism and sustainability

2.7 develop community stakeholder's awareness of their organisation's environmental policies and approaches

Outcome 3: Understand how to make customer service environmentally friendly and sustainable

Assessment Criteria

The learner can:

3.1 explain principles of environmentalism and sustainability that are relevant to customer service operations

3.2 investigate ways to express environmental policies and link them with customer service

3.3 explain principles of energy management and reduction of carbon emissions

3.4 explain principles of waste management relevant to their organisation

3.5 evaluate techniques for reviewing environmental aspects of customer service systems

3.6 review different actions that may be taken to improve environmental aspects of customer service delivery

3.7 describe ways to minimise resource use in customer service delivery

3.8 evaluate techniques for communicating and developing awareness of environmental matters among stakeholders

3.9 describe ways to encourage customers to act more environmentally

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

4 The customer service systems referred to in your evidence may be formal or informal.

5 The waste management policy used in your evidence must cover:

   a   reduction

   b   re-use

   c   re-cycling

   d   disposal.

6 Your evidence should include working with customers who are:

   a   receptive to environmental initiatives

   b   resistant to environmental initiatives.

Unit 405 Maintain and develop a healthy and safe customer service environment

Level: 4
Credit value: 8
NDAQ number: M/601/1234

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Assess the customer service environment for factors that affect health and safety
2 Minimise risks to health and safety in the customer service environment
3 Understand how to maintain a healthy, safe and effective working environment for customers and staff

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B12 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 405 Maintain and develop a healthy and safe customer service environment

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

Assessment Criteria

The learner can:

1.1 identify health and safety hazards in their customer service environment

1.2 assess the risks associated with these hazards

1.3 identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers

1.4 evaluate health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers against the organisation's policies and procedures and customer expectations

1.5 provide information about risks and hazards to those responsible for health and safety

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

Assessment Criteria

The learner can:

2.1 ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety

2.2 ensure that measures are in place to control risks to health and safety and are consistent with organisational policies and procedures

2.3 ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them

2.4 enable staff to identify and report health and safety hazards

2.5 use agreed organisational procedures to deal with hazards when they occur

2.6 review the health and safety aspects of the customer service environment as required by law and their organisation

2.7 carry out emergency drills within their area of responsibility

2.8 follow organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents

Outcome 3: Understand how to maintain a healthy, safe and effective working environment for customers and staff

Assessment Criteria

The learner can:

3.1   explain their responsibilities for health and safety in the workplace

3.2   explain their responsibilities for maintaining an effective working environment

3.3   describe how to access information on legal and regulatory requirements for health and safety and relevant codes of practice

3.4   describe the types of health and safety hazards that are likely to occur in their area of responsibility

3.5   explain how to assess the risks associated with these health and safety hazards

3.6   explain how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice

3.7   explain their organisation's policies and procedures for health and safety

3.8   describe the recording and reporting procedures within their organisation that are relevant to maintaining a healthy and safe environment

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for performance evidence within this Unit except when realistic practices are staged to test emergency procedures.

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 for your assessor to be confident that you are competent.

4   Your evidence must show that you have assessed and controlled risks associated with:

a   the use of equipment

b   the working environment

c   working practices

d   potential breaches of security

e   factors that affect the well-being of staff

f   factors that affect the well-being of customers.

5   You must provide evidence that you have collected and evaluated key requirements of:

a   legal requirements

b   regulatory requirements

c   organisational codes of practice

d   ethical codes of practice.

Unit 406　　　Plan, organise and control customer service operations

Level:　　　　　4
Credit value:　　10
NDAQ number:　A/601/1236

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1　Plan customer service operations
2　Supervise customer service operations
3　Deal with problems relating to customer service operations
4　Understand how to plan, organise and control customer service operations

Guided learning hours

It is recommended that 67 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B13 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 406 Plan, organise and control customer service operations

Outcome 1: Plan customer service operations

Assessment Criteria

The learner can:

1.1 analyse customer expectations and define the service offer designed to meet those expectations

1.2 develop specific plans that will ensure sustainable and consistent delivery of customer service

1.3 identify any contingencies that may occur, assess their risks and develop effective plans to deal with them

1.4 plan how they will monitor and evaluate customer service operations

Outcome 2: Supervise customer service operations

Assessment Criteria

The learner can:

2.1 negotiate the availability of people and other resources that they need to implement their customer service delivery plans

2.2 develop specific, measurable and realistic targets for the staff who deliver customer service

2.3 ensure that planned resources are available when required

2.4 brief staff on their objectives and targets

2.5 encourage feedback from staff and customers and use their feedback to modify objectives and targets

2.6 collect and analyse feedback from customers and staff on customer service operations

2.7 evaluate how effectively agreed outcomes and processes are being achieved

2.8 modify their plans for customer service operations in the light of their evaluation.

Outcome 3: Deal with problems relating to customer service operations

Assessment Criteria

The learner can:

3.1 collect information on the nature of the problem and assess the likely impact on the customer

3.2 identify the causes of the problem and possible solutions

3.3 evaluate possible solutions against customer expectations and organisational needs

3.4   select and implement an acceptable solution with the minimum possible disruption to customers

3.5   monitor the implementation of the solution and, where necessary, make adjustments

Outcome 4: Understand how to plan, organise and control customer service operations

Assessment Criteria

The learner can:

4.1   explain how to develop plans for customer service operations and what these plans should contain

4.2   explain how to identify and work within allocated budgets and time targets for customer service operations

4.3   Describe the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them

4.4   describe the types of monitoring methods that can be used and the criteria they should select to evaluate the effectiveness of customer service operations

4.5   explain how to develop objectives and targets for staff

4.6   explain the importance of briefing staff and how to do so effectively

4.7   explain the importance of monitoring the quality of their customer service operations

4.8   investigate the types of problems that are likely to occur in their customer service operations and how to plan for dealing with these

4.9   explain the importance of liaising with customers and colleagues about problems and possible solutions

4.10   explain how to identify and evaluate possible solutions

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   Your plans must provide evidence that you have taken into account:

   a   the aims, objectives and targets for your area of responsibility

   b   your organisation's customer service strategy

   c   your customers' needs and expectations.

5   Your evidence must show that your plans include consideration of:

   a   time

   b   physical resources

   c   human resources

   d   financial resources.

6   You must show that you have negotiated with:

    a   front-line staff

    b   supervisors or team leaders

    c   senior managers.

7   You must provide evidence that you have collected and analysed:

    a   qualitative information

    b   quantitative information.

Unit 407　　　　　Review the quality of customer service

Level:　　　　4
Credit value:　　8
NDAQ number:　J/601/1238

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1　Plan how to measure customer service
2　Collect and analyse information on customer service
3　Understand how to review the quality of customer service

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B14 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 407 Review the quality of customer service

Outcome 1: Plan how to measure customer service

Assessment Criteria

The learner can:

1.1 identify the features of customer service delivery that affect customer satisfaction

1.2 plan how they will monitor the features of customer service delivery that affect customer satisfaction

1.3 plan how they will analyse the information they have collected

Outcome 2: Collect and analyse information on customer service

Assessment Criteria

The learner can:

2.1 implement their plans for monitoring customer service processes and outcomes

2.2 analyse the monitoring information they have collected

2.3 compare the conclusions of their analysis with the criteria they identified

2.4 adapt their plans if the agreed methods of collecting and analysing information are not proving effective

2.5 communicate the results of their measurement of customer service to colleagues

2.6 agree actions to improve customer service that result from their measurements and analysis

Outcome 3: Understand how to review the quality of customer service

Assessment Criteria

The learner can:

3.1 explain the importance of measuring the quality of customer service

3.2 explain which aspects of the customer service process affect customer satisfaction

3.3 explain how to select the criteria they will use for measurement of customer service

3.4 explain how to construct representative samples

3.5 describe the types of information collection methods they could use

3.6 describe methods of analysing information on the quality of service

3.7 explain how to identify recommendations that flow from their measurement of customer service

3.8 explain the procedures for making recommendations on customer service improvements within their organisation

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   You must include evidence of collecting and analysing information that is:

   a   quantitative

   b   qualitative.

5   Your communication of the results of your measurements 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.

6   Your evidence must show that you have communicated the results of your measurements to three of these groups of people:

   a   front line staff

   b   supervisors or team leaders

   c   senior managers

   d   colleagues in other departments

   e   service partners.

Unit 408 Build and maintain effective customer relations

Level: 4
Credit value: 8
NDAQ number: L/601/1239

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Establish effective customer relations
2   Maintain and develop effective customer relations
3   Understand how to build and maintain customer relations

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B15 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 408   Build and maintain effective customer relations

Outcome 1: Establish effective customer relations

Assessment Criteria

The learner can:

1.1   identify the types of customers with whom they should build longer term customer relations and promote loyalty

1.2   communicate with these customers so that they know they are important to the organisation

1.3   explain their role, the purpose of making contact and the mutual benefits of building a longer term relationship

1.4   make it clear that they welcome two-way communication about customer expectations

Outcome 2: Maintain and develop effective customer relations

Assessment Criteria

The learner can:

2.1   keep customers informed and accept criticism from customers openly and constructively

2.2   regularly assess whether customer expectations are being consistently met

2.3   use their influence and authority in their own organisation to ensure that customer needs are being met and, where possible, exceeded

2.4   collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction

2.5   analyse customer relations and propose changes that will develop longer term loyalty to people with authority in their organisation

Outcome 3: Understand how to build and maintain customer relations

Assessment Criteria

The learner can:

3.1   identify and prioritise types of customers with whom they should be building a longer term relationship

3.2   describe the most appropriate method of establishing relationships with customers targeted for longer term relationships

3.3   explain the importance of effective communication skills when dealing with customers

3.4   explain how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship

3.5   explain how to communicate with customers, especially when they are dissatisfied with products and services

3.6   explain how to negotiate with customers in a way that balances customer expectations with the expectations of their own organisation

3.7   describe the types of compromises that would be acceptable to their organisation when meeting customer expectations

3.8   explain how to use their influence and authority in their organisation to meet or exceed customer expectations

3.9   describe methods of monitoring customer satisfaction appropriate to their level of authority in the organisation

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   You must provide evidence that you can build and maintain relationships with:

        a   potential or new customers

        b   existing customers

        c   customers with particular needs and expectations

        d   customers who have experienced problems with your organisation's services or products.

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.

5.   You must provide evidence that you have collected feedback that is:

        a   qualitative

        b   quantitative

        c   formal

        d   informal

Unit 409 Deliver seamless customer service with a team

Level: 4
Credit value: 8
NDAQ number: F/601/1240

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Build effective working relationships with colleagues
2 Build effective relationships with service partners
3 Understand how to deliver seamless customer service with a team

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B16 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 409   Deliver seamless customer service with a team

Outcome 1: Build effective working relationships with colleagues

Assessment Criteria

The learner can:

1.1   identify and agree with colleagues team strategies for delivering seamless customer service

1.2   share information and knowledge to improve customer service

1.3   encourage, accept and respond positively to feedback from colleagues on customer service performance

1.4   work with colleagues to deal with conflict constructively

1.5   review teamwork strategies for delivering seamless customer service with colleagues

Outcome 2: Build effective relationships with service partners

Assessment Criteria

The learner can:

2.1   identify the service partners who are most significant to delivery of seamless customer service

2.2   take opportunities to establish and develop effective working relationships with service partners

2.3   ensure that their commitments to service partners and service partners' commitments to them are being fulfilled as agreed

2.4   communicate clearly and in good time with service partners on issues that affect those partners and the learner's customers

2.5   work together with service partners to resolve customer service problems

2.6   work together with service partners to deal with conflict constructively

Outcome 3: Understand how to deliver seamless customer service with a team

Assessment Criteria

The learner can:

3.1   explain how to analyse the contribution and roles of colleagues and service partners when delivering customer service

3.2   describe the types of support they could provide to colleagues and service partners and those people could provide to them to deliver seamless customer service

3.3   explain the benefits and challenges of collaborative working, what may go wrong and how to prepare for this

3.4   explain the value and importance of effective communication with colleagues and service partners

3.5   describe the types of behaviours that show they have a relationship of respect and honesty with colleagues and service partners

3.6   explain how to deal with conflict constructively

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   Your evidence must show that you have built relationships with members of your organisation from two of these groups of people:

   a   front line staff

   b   supervisors or team leaders

   c   senior managers

   d   colleagues in other departments

   e   service partners.

5   Your evidence must show that you have communicated with team members and service partners using two different communication media.

Unit 410   Handle referred customer complaints

Level: 4
Credit value: 10
NDAQ number: K/601/1524

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1   Investigate referred customer complaints
2   Take action to deal with referred customer complaints
3   Identify repeated customer complaints and recommend changes to policies and procedures
4   understand how to handle referred customer complaints

Guided learning hours

It is recommended that 67 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit C8 of the Customer Service NOS 2010
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Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 410 Handle referred customer complaints

Outcome 1: Investigate referred customer complaints

Assessment Criteria

The learner can:

1.1 collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint

1.2 take personal responsibility for dealing with the complaint subject to the limits of their authority

1.3 keep their customer informed about what steps are being taken to deal with the customer's complaint

1.4 follow the correct procedures if their customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation.

Outcome 2: Take action to deal with referred customer complaints

Assessment Criteria

The learner can:

2.1 identify a range of possible solutions that balance customer expectations and the organisation's service offer

2.2 liaise with their customer and colleagues to negotiate an acceptable solution

2.3 agree a solution that adapts current policies and procedures within their own authority and furthers their organisation's aims and objectives

2.4 implement the agreed solution and liaise with their customer to ensure that the customer is satisfied with the action that has been taken

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

Assessment Criteria

The learner can:

3.1 identify patterns and trends in customer complaints

3.2 analyse trends in customer complaints

3.3 identify solutions acceptable to their customers that fit the organisation's service offer

3.4 identify possible changes to customer service policies and procedures

3.5 consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims

3.6 select an option for change and follow organisational procedures to ensure that their recommendations come to the attention of decision makers

Outcome 4: understand how to handle referred customer complaints

Assessment Criteria

The learner can:

4.1   explain the importance of minimising customer complaints and dealing with them effectively and promptly when they occur

4.2   explain their organisation's complaints procedures and the limits of their authority

4.3   describe the procedures they must follow if a complaint is likely to be escalated or have wider implications

4.4   describe the types of complaints that could have wider implications for their organisation

4.5   explain why it is important to communicate with their customer at all stages of the complaints procedure

4.6   explain how to devise solutions that balance customer expectations and organisational aims

4.7   explain why it is important to identify and present to the customer a range of possible options

4.8   explain why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to their customer and how they could justify this

4.9   research how to identify trends and patterns in customer complaints and solutions

4.10   describe how to explore the implications of these patterns and trends for their organisations policies and procedures

4.11   explain how to recommend changes to organisational policies and procedures

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   You must provide evidence that you have collected and analysed:

        a   qualitative information

        b   quantitative information.

5   You must show that you have dealt with complaints from customers who are:

        a   prepared to accept your proposed solutions

        b   not prepared to accept your proposed solutions.

6   The complaints 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

        c   a problem resulting from a shortage of resources or human error.

Unit 411 Implement quality improvements to customer service

Level: 4
Credit value: 10
NDAQ number: L/601/1578

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Plan the introduction of customer service improvements
2 Manage the implementation of customer service improvements
3 Monitor and evaluate customer service improvements
4 Understand how to implement quality improvements to customer service

Guided learning hours

It is recommended that 67 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D14 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 411 Implement quality improvements to customer service

Outcome 1: Plan the introduction of customer service improvements

Assessment Criteria

The learner can:

1.1 identify possible customer service improvements and the resources available to implement them

1.2 evaluate factors that may help or hinder the introduction of change

1.3 develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues

1.4 assess the risks associated with each action to effect change

1.5 plan how they will evaluate the proposed improvements

Outcome 2: Manage the implementation of customer service improvements

Assessment Criteria

The learner can:

2.1 inform the people who will be affected by change, win their support and keep them informed of progress

2.2 implement their plans for improvements dealing effectively with any difficulties

2.3 provide the necessary support to all their colleagues who are involved with changes and improvements

2.4 ensure that the planned improvements are implemented on time and within budget

Outcome 3: Monitor and evaluate customer service improvements

Assessment Criteria

The learner can:

3.1 monitor and evaluate the impact that the changes are having on the quality of customer service

3.2 identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements

3.3 identify any lessons from the change process and note these for future activities

Outcome 4: Understand how to implement quality improvements to customer service

Assessment Criteria

The learner can:

4.1   explain the importance of careful planning when introducing change

4.2   evaluate the types of factors that may help or hinder the process of change and how to identify and plan for these

4.3   describe how to develop plans that contain realistic objectives, tasks and schedules

4.4   explain the importance of having clear lines of responsibility and accountability

4.5   explain how to identify and plan for possible contingencies

4.6   describe the importance of clear communication when changes are taking place

4.7   explain why it is important to win the support of people who will be affected by change

4.8   describe how to win over staff who are resistant to change

4.9   describe the types of support that staff may need when improvements are being implemented and how to provide such support

4.10   explain why it is important to complete change on time and within budget

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   Your evidence must include planning for and using the following resources when implementing improvements to customer service:

    a   time

    b   human resources

    c   physical resources

    d   financial resources.

5   You must provide evidence of communicating with:

    a   customers

    b   front-line staff

    c   colleagues

    d   supervisors/team leaders

    e   senior managers

    f   service partners.

6   Your communication 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.

7   You must include evidence of collecting, analysing and using information that is:

a   quantitative

b   qualitative.

Unit 412 Plan and organise the development of customer service staff

Level: 4
Credit value: 9
NDAQ number: L/601/1581

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1   Identify customer service staff development and training needs
2   Organise customer service development and training
3   Understand how to plan and organise the development of customer service staff

Guided learning hours

It is recommended that 60 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D15 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 412 Plan and organise the development of customer service staff

Outcome 1: Identify customer service staff development and training needs

Assessment Criteria

The learner can:

1.1 identify where customer service could be improved through staff training and development

1.2 help staff providing customer service to identify their own development and training needs

1.3 help staff to identify how they learn best

1.4 agree the types of staff development and training activities that are needed

1.5 report staff development needs to relevant people in your organisation

Outcome 2: Organise customer service development and training

Assessment Criteria

The learner can:

2.1 agree the aims and objectives of the customer service development and training activities

2.2 agree the type and style of customer service development and training that are appropriate

2.3 agree the detailed design of customer service development and training activities

2.4 organise customer service development and training activities

2.5 monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice

2.6 organise additional help and training for staff where this is needed

Outcome 3: Understand how to plan and organise the development of customer service staff

Assessment Criteria

The learner can:

3.1 explain the importance of continuously developing staff that provide customer service

3.2 describe current objectives and targets that relate to customer service in their area of responsibility

3.3 identify when development and training could improve customer service performance

3.4 describe the range of types and styles of development and training and how to select those that are appropriate to customer service, their organisation, and specific training and development needs

3.5 explain why it is important that they should have an input into the design and delivery of customer service development and training for their staff

3.6 describe how they can help staff to put into practice what they have learned

3.7   explain how to assess the impact that development and training has had on customer service performance

3.8   describe the types of additional support they could provide to staff following development and training

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   Your evidence must show that you have been involved with the training and development of staff from two of the following groups

    a   new staff

    b   existing staff

    c   front-line staff

    d   supervisors and team leaders

    e   part-time staff

    f   support staff

    g   service partners.

5   You must show that you monitor the performance of staff involved in development and training activities through:

    a   formal monitoring mechanisms such as appraisals and Key Performance Indicators (KPIs)

    b   informal and more immediate monitoring such as direct supervision.

Unit 413 Develop a customer service strategy for a part of an organisation

Level: 4
Credit value: 11
NDAQ number: M/601/1587

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

1 Research and evaluate their organisation's business and customer service strategy
2 Help to identify current and future best practice in customer service
3 Identify and recommend the key features of a customer service strategy
4 Understand how to develop a customer service strategy for an area

Guided learning hours

It is recommended that 73 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D16 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 413   Develop a customer service strategy for a part of an organisation

Outcome 1: Research and evaluate their organisation's business and customer service strategy

Assessment Criteria

The learner can:

1.1   identify their organisation's values, aims and objectives

1.2   identify the role of a given part of the organisation in achieving the strategy

1.3   evaluate the implications of the strategy for customer service in this part of the organisation

1.4   confirm the implications of the strategy for customer service with colleagues

1.5   collect information on and analyse customer expectations

1.6   match customer expectations with the customer service implications of the business strategy for a given part of their organisation

Outcome 2: Help to identify current and future best practice in customer service

Assessment Criteria

The learner can:

2.1   identify other organisations which represent models of good practice in customer service

2.2   evaluate the key features of customer service in these organisations and the principles that underpin their approaches

2.3   identify and analyse current research on trends and developments in customer service

2.4   identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations

2.5   explore the implications of their research for the part of the organisation they are working in

2.6   discuss the outcomes of their research with colleagues

Outcome 3: Identify and recommend the key features of a customer service strategy

Assessment Criteria

The learner can:

3.1   identify values, aims and objectives that are consistent with their research

3.2   identify contact processes and channels for customer service that are consistent with their values, aims and objectives

3.3   identify how they will evaluate the effectiveness of the strategy

3.4   discuss with colleagues the key features of a customer service strategy

3.5   construct a customer service strategy for the chosen part of the organisation and agree it with colleagues and managers

Outcome 4: Understand how to develop a customer service strategy for an area

Assessment Criteria

The learner can:

4.1   evaluate the importance of having a customer service strategy for a given part of the organisation

4.2   describe how to access information on their organisation's overall business strategy and analyse its implications

4.3   describe sources of information they can use to find out about their customers and their expectations

4.4   evaluate the importance of customer loyalty and customer service practices that can help to retain loyalty

4.5   explain how to identify other organisations which might represent models of best practice in customer service

4.6   describe sources of research on trends and developments in customer service

4.7   explain how to develop values, aims and objectives relevant to customer service

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   You should be able to identify and analyse the needs and expectations of:

a   existing customers

b   potential or new customers.

5   Your evidence of the approach taken by other organisations may relate to competitors or to organisations that provide similar services or products but are not competitors.

6   The mission, aims, objectives, targets and values of your organisation may be expressed formally or informally.

Unit 414   Manage a customer service award programme

Level: 4
Credit value: 7
NDAQ number: A/601/1592

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Plan a customer service award programme
2   Implement and manage a customer service award programme
3   Understand how to manage a customer service award programme

Guided learning hours

It is recommended that 70 hours should be allocated for this unit, although patterns of delivery are likely to vary.
70

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D17 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 414　　Manage a customer service award programme

Outcome 1: Plan a customer service award programme

Assessment Criteria

The learner can:

1.1　identify all the possible options for a customer service award scheme drawing on examples inside and outside of their own organisation

1.2　identify the benefits and drawbacks of each option for a customer service award programme

1.3　choose the option for a customer service award programme that best suits their customer satisfaction and team motivation objectives

1.4　plan the details of their chosen customer service award programme

1.5　identify the benefits and costs of their chosen customer service award programme in relation to customer satisfaction and team motivation

Outcome 2: Implement and manage a customer service award programme

Assessment Criteria

The learner can:

2.1　launch developments in the customer service award programme in a way that informs and motivates customers and team members

2.2　ensure that the criteria for the customer service awards are transparent and are considered fair by team members

2.3　publicise the customer service awards programme to customers in a way that demonstrates organisational commitment to excellent customer service

2.4　organise the judging of individual and team awards in a way that means the results can be justified to the organisation as a whole

2.5　announce the results and present the awards in a manner that suits the culture of their organisation and customer service team

2.6　review and evaluate the effects of the customer service awards programme on customers and team members

Outcome 3: Understand how to manage a customer service award programme

Assessment Criteria

The learner can:

3.1　explain the principles of motivation and in particular the importance of recognition as a motivator

3.2　explain how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction

3.3   compare the benefits and drawbacks of different rewards associated with award programmes

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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

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

4   The award programmes used in your evidence may relate to individuals, teams, special projects, trainees, incentive schemes or customer nominated awards.

5   You must provide evidence that you have planned details of your award programme that include:

a   the criteria for making the award

b   what the award will be

c   the frequency of the award

d   the procedure for judging the award

e   how the award will be presented and publicised.

6   The business case for the award programme may be made formally or informally.

7   Your evidence must show that you have evaluated the customer service award programme from the point of view of:

a   benefits to the organisation

b   benefits to the supervisors and managers of the winners

c   the effect on the winner or winners

d   the effect on others who are not winners.

Unit 415 Apply technology or other resources to improve customer service

Level: 4
Credit value: 11
NDAQ number: Y/601/1597

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Identify and specify opportunities for customer service improvement
2 Evaluate options for applying technology or other resources to improve customer service
3 Oversee the implementation of resource changes to improve customer service
4 Understand how to apply technology or other resources to improve customer service

Guided learning hours

It is recommended that 73 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D18 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 415 Apply technology or other resources to improve customer service

Outcome 1: Identify and specify opportunities for customer service improvement

Assessment Criteria

The learner can:

1.1 monitor developments in technology and the use of other resources to improve customer service

1.2 review customer service delivery systems with specific reference to use of resources and technology

1.3 identify opportunities and options for improving customer service by applying technology or other resources

1.4 analyse the customer service benefits that could result from options for improvement

1.5 specify the changes in technology or other resources needed to deliver the options

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

Assessment Criteria

The learner can:

2.1 identify the options for improving customer service with the application of technology or other resources

2.2 establish the costs associated with each option for improving customer service

2.3 list and where possible quantify the benefits from each option for improving customer service

2.4 estimate the affordability of each option to improve customer service

2.5 recommend the most appropriate options for implementation

2.6 identify the probable effects of any recommended changes on their organisation's service offer and customer perceptions

2.7 plan a business case to support their recommendations for improvements through application of technology or other resources

Outcome 3: Oversee the implementation of resource changes to improve customer service

Assessment Criteria

The learner can:

3.1 plan implementation using details of agreed developments to improve customer service

3.2 brief colleagues about the implementation of customer service improvements and the expected benefits

3.3 monitor implementation of customer service improvements and the expected benefits

3.4 review implementation of customer service improvements with colleagues

3.5 make appropriate adjustments to implementation of customer service improvements as a result of review

Outcome 4: Understand how to apply technology or other resources to improve customer service

Assessment Criteria

The learner can:

4.1 describe features and functionality of available technology that may contribute to improvements in customer service

4.2 evaluate how the application of additional resources other than technology can be used to improve customer service

4.3 describe methods for the systematic review of customer service systems

4.4 explain techniques to analyse the costs and benefits of options for improving customer service

4.5 describe methods for presenting a business case for applying technology or other resources to make improvements in customer service

4.6 explain briefing techniques for introducing colleagues to changes

4.7 describe ways to review and adjust customer service delivery after the implementation of changes

Evidence requirements

1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

4 The technology used in your evidence may be electronic or non-electronic.

5 The costs you establish for each option for improving customer service must be financial.

6 The business case you plan for applying technology or other resources to improve customer service may be formal or informal.

7 Your review of the implementation of customer service improvements may be formal or informal.

Unit 416 Review and re-engineer customer service processes

Level: 4
Credit value: 11
NDAQ number: R/601/1601

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

1. Scope the customer service processes to be reviewed
2. Analyse the customer service process and identify improvement opportunities
3. Evaluate improvement options and re-engineer service processes
4. Understand how to review and re-engineer customer service processes

Guided learning hours

It is recommended that 73 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D19 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 416 Review and re-engineer customer service processes

Outcome 1: Scope the customer service processes to be reviewed

Assessment Criteria

The learner can:

1.1 define the boundaries of a customer service process

1.2 agree with the appropriate people the boundaries of the customer service process to be reviewed

1.3 set parameters for the types of change that might be made during the re-engineering

1.4 communicate with everybody involved regarding the aims of the review

Outcome 2: Analyse the customer service process and identify improvement opportunities

Assessment Criteria

The learner can:

2.1 identify all the key steps in the customer service process

2.2 analyse each step in the customer service process in fine detail

2.3 assess each step in the customer service process with reference to customer satisfaction, costs and compliance with relevant regulation

2.4 raise questions about each step in the current process to establish where there is scope for development and improvement

2.5 explore all the questions raised with those involved in the process and their managers

2.6 identify options for re-engineering improvements that deserve further investigation

Outcome 3: Evaluate improvement options and re-engineer service processes

Assessment Criteria

The learner can:

3.1 evaluate each option for re-engineering improvements that deserve further investigation

3.2 make and agree recommendations regarding each option that has been evaluated for re-engineering the customer service process

3.3 plan the implementation of agreed recommendations for re-engineering the customer service process

3.4 implement re-engineering of the customer service process

3.5 monitor the results of implementing re-engineering of the customer service process

Outcome 4: Understand how to review and re-engineer customer service processes

Assessment Criteria

The learner can:

4.1   explain ways to establish boundaries around a customer service process to be re-engineered

4.2   describe who needs to be involved in the re-engineering process to ensure that the recommendations can be seen through

4.3   explain the importance of communicating with those involved in service delivery when re-engineering the process

4.4   review ways to analyse and assess the effectiveness of separate steps in the customer service process

4.5   explain the importance of identifying the right questions to challenge existing customer service processes appropriately

4.6   describe techniques for implementing changes in customer service processes

4.7   explain the importance of monitoring the effects of customer service process changes

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

4   The 'appropriate people' with who you agree the boundaries of the customer service process to be reviewed must include one or more of the following:

a   people in other departments or sections of the organisation

b   internal customers

c   external customers

d   internal suppliers

e   service partners

f   service delivery colleagues

g   line managers.

5   Your plan for implementing agreed recommendations may be formal or informal.

Unit 417　　　　　Manage customer service performance

Level:　　　　4
Credit value:　　7
NDAQ number:　K/601/1605

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
　　1　Monitor performance in customer service operations
　　2　Take management actions to improve performance in customer service operations
　　3　Understand how to manage customer service performance

Guided learning hours

It is recommended that 47 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit D 20 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 417 Manage customer service performance

Outcome 1: Monitor performance in customer service operations

Assessment Criteria

The learner can:

1.1 collect regular statistics on customer service operations performance

1.2 interpret broad patterns of customer service operations statistics

1.3 investigate questions raised by interpretation and analysis of performance

1.4 interpret statistics regarding customer service performance in specific product and service areas

1.5 match customer service performance statistics to benchmarks, targets, standards or agreed tolerances

1.6 use customer service performance statistics to identify trends

1.7 compare customer service performance statistics with broader quality monitoring results

1.8 review resource provision to identify any resource changes needed to improve customer service performance management

Outcome 2: Take management actions to improve performance in customer service operations

Assessment Criteria

The learner can:

2.1 identify management actions to maintain and improve on customer service performance

2.2 summarise monitoring evidence to support the case for management actions to improve performance

2.3 brief team members on changes they must make to improve customer service performance

2.4 organise resource changes needed to improve customer service performance

2.5 organise suitable coaching or training to improve customer service performance where development needs have been identified

2.6 adjust customer service performance targets which have ceased to be both challenging and achievable

Outcome 3: Understand how to manage customer service performance

Assessment Criteria

The learner can:

3.1 explain methods for collecting statistics on customer service operations performance

3.2 explain techniques for interpreting customer service performance statistics

3.3   explain the importance of setting targets that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)

3.4   identify sources of benchmarks and standards for customer service performance

3.5   explain techniques for identifying trends and patterns in customer service performance

3.6   compare options for management actions that will improve customer service performance

3.7   describe methods of coaching and training to improve customer service performance

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.

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

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

4   The techniques used in your evidence for interpreting customer service performance statistics and identifying trends may be any which are practical for your organisation.

Appendix 1   Sources of general information

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

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:
- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:
- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

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

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:
- ***Walled Garden***
  Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***
  Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
  Contains dates and information on the latest Centre events
- ***Online assessment***
  Contains information on how to register for GOLA assessments.

City & Guilds
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www.cityandguilds.com

Useful contacts

UK learners
General qualification information

T: +44 (0)844 543 0033
E: **learnersupport@cityandguilds.com**

International learners
General qualification information

T: +44 (0)844 543 0033
F: +44 (0)20 7294 2413
E: **intcg@cityandguilds.com**

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

T: +44 (0)844 543 0000
F: +44 (0)20 7294 2413
E: **centresupport@cityandguilds.com**

Single subject qualifications
Exam entries, Results, Certification, Missing or
late exam materials, Incorrect exam papers,
Forms request (BB, results entry), Exam date
and time change

T: +44 (0)844 543 0000
F: +44 (0)20 7294 2413
F: +44 (0)20 7294 2404 (BB forms)
E: **singlesubjects@cityandguilds.com**

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

T: +44 (0)844 543 0000
F: +44 (0)20 7294 2413
E: **intops@cityandguilds.com**

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

T: +44 (0)844 543 0000
F: +44 (0)20 7294 2413
E: **walledgarden@cityandguilds.com**

Employer
Employer solutions, Mapping, Accreditation,
Development Skills, Consultancy

T: +44 (0)121 503 8993
E: **business_unit@cityandguilds.com**

Publications
Logbooks, Centre documents, Forms, Free
literature

T: +44 (0)844 543 0000
F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that
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