Unit 304 Organise and deliver customer service

UAN:	**L/506/2150**
Level:	3
Credit value:	5
GLH:	27
Relationship to NOS:	Customers Service (2013) National Occupational Standards: • CFACSB10 Organise the delivery of reliable customer service • CFACSB2 Deliver reliable customer service
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to organise and deliver customer service. Upon completion of this unit, learners will be able to both plan and execute the delivery of customer service.

Learning outcome
The learner will: 1. understand how to organise customer service delivery
Assessment criteria
The learner can: 1.1 explain how different **methods of promoting products and/or services** impact on customer service delivery 1.2 explain **who should be involved** in the organisation of customer service delivery 1.3 explain the importance of differentiating between customers' **wants, needs and expectations** 1.4 explain different ways of segmenting customer groups 1.5 explain how **customer segmentation** is used in organising customer service delivery 1.6 explain how to analyse the "**customer journey**".

Assessment guidance

Methods of promoting products and/or services:

- advertising in press, TV, billboards
- mailshots
- flyers
- Internet
- PR
- through offers

Who should be involved:

- self
- management
- other staff
- other departments

Wants:

What the customer thinks they should have.

Needs:

What the customer must have/requires.

Expectations:

What the customer thinks they should experience or get.

Customer segmentation:

Is the division of customers into groups according to eg

- age
- income
- gender
- interests
- spending habits

Customer journey:

The experience of your customer with your organisation, from beginning to end, through their eyes. This is the journey from first impression to final experience.

Evidence for this element may be supplied by:

- professional discussion
- report on research into customer service delivery
- questioning.

Learning outcome
The learner will: 2. be able to plan the delivery of customer service
Assessment criteria
The learner can: 2.1 identify customers' needs and expectations 2.2 map the "customer journey" 2.3 confirm that **systems and structures** are in place to enable the delivery of agreed standards of customer service 2.4 prepare the **resources** needed to deliver products and/or services to different types of customers 2.5 plan how to deal with **unexpected additional workloads** 2.6 allocate priorities to address points of **service failure.**

Assessment guidance

Systems:
Processes and procedures.

Structures
Roles and responsibilities.

Resources:
eg

- staff
- rotas
- schedules
- documents
- marketing materials

Unexpected additional workloads:
eg

- staff absences
- customer complaints
- sudden increase in numbers of customers
- resource failure
- IT failure
- human error

Service failure
eg

- lack of resources
- IT failure
- customer complaint
- human error

Evidence may be supplied by:

- observation

- witness testimony
- professional discussion
- reflective account
- report on research into customer service delivery
- organisational processes and procedures*
- organisation chart*
- customer journey 'map'.
- marketing materials*
- rotas*
- schedules*
- internal documentation*

Learning outcome
The learner will: 3. be able to deliver customer service
Assessment criteria
The learner can: 3.1 take steps to ensure that the needs of customers are balanced with **organisational objectives** 3.2 agree realistic and achievable actions with customers 3.3 identify areas for improvement in their own **customer service delivery** 3.4 adapt their own **customer service delivery** to meet customers' changing expectations.

Assessment guidance

Organisational objectives:

- service offer
- customer service standards
- targets
- financial limits

Customer service delivery:

- behaviour
- style
- tone of voice
- body language

Evidence may be supplied by:

- observation
- witness testimony
- professional discussion
- questioning
- reflective account
- report on research into customer service delivery
- service offer*
- standards*
- targets*
- organisational processes and procedures*

- internal documentation*
- customer feedback*
- appraisal

Note:

The candidate must be observed at least on one occasion showing competence in organising and delivering customer service. Additional evidence must prove the candidate has shown competency in dealing with a range of customers in various situations over time through witness testimonies and other evidence from the examples above.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.