Level 1/2/3 Award in Customer Service (8992)

Qualification handbook

Ofqual Level 1: 500/3682/8
Ofqual Level 2: 500/3681/6
Ofqual Level 3: 500/3680/4

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Qualification handbook

Version and date	Change detail	Section
7.0 July 2012	Removed requirement for QAP form	Centre requirements – Routes (-21)(-22) – Page 8
7.1 August 2013	product code for ordering on demand exam papers added	Assessment Section 5
7.2 October 2013	Unit numbers amended	Structure Units Assessment
7.3 October 2017	Added GLH and TQT details Removed QCF	Introduction to the qualification Appendix 1

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1   Introduction to the qualification

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

Qualification titles and levels	Level 1/2/3 Awards in Customer Service
City & Guilds qualification numbers	Level 1 8992-11 Level 2 8992-12 Level 3 8992-13 Level 1 8989-21 (Hairdressing route) (UK only) Level 2 8989-22 (Hairdressing route) (UK only)
Ofqual accreditation numbers	Ofqual Level 1: 500/3682/8 Ofqual Level 2: 500/3681/6 Ofqual Level 3: 500/3680/4
Last registration date	Consult the Walled Garden/Online Catalogue for last dates
Last certification date	Consult the Walled Garden/Online Catalogue for last dates

These qualifications have been developed in response to employers' needs for short, bite-sized courses within the Business Support Skills sector. They are single unit qualifications and complement our existing suite of Business and IT single subjects. We envisage that these customer service qualifications could be used as part of the induction process ensuring the candidate receives the necessary skills and knowledge to effect excellent customer service.

Customer Service skills are important in every sector and industry and these qualifications will provide the generic customer service skills needed.

The qualifications are available at Levels 1-3 (Levels 1-2 for the Hairdressing route).

Europass certificates are available for all these qualifications.

The Level 1/2/3 Award in Customer Service (8992) aims to:
- meet the needs of candidates who work or want to work as in a range of job roles within the Customer Service sector
- allow candidates to learn, develop and practise the skills required for employment and/or career within the Customer Service sector or other sectors that require Customer Service skills
- provide valuable accreditation of skills and/or knowledge for candidates, without requiring or proving occupational competence.

1.1   Qualification structure

To achieve the Level 1, 2, 3 Award in Customer Service, learners must achieve 6, 8, 10 credits from the mandatory units.

The table below illustrates the unit titles, guided learning hours credit value of each unit which will be awarded to candidates successfully completing the required units and credits.

Accreditation unit reference	City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	Credit value	Guided learning hours
Y/501/4375	Unit 111	Principles of Customer Service	Mandatory	6	30
T/501/4349	Unit 112	Principles of Customer Service	Mandatory	8	60
D/501/4376	Unit 113	Principles of Customer Service	Mandatory	10	90

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Level 1 Awards in Customer Service	30	60
Level 2 Awards in Customer Service	60	80
Level 3 Awards in Customer Service	90	100

1.2   Opportunities for progression

On completion of these qualifications candidates may progress:

- into employment
- within this suite of Customer Service awards, eg Level 1 to Level 2
- to other Business and/or IT single subject.

1.3   Qualification support materials

City & Guilds also provides the following publications and resources specifically for these qualifications:

Description	How to access
Sample test papers	www.cityandguilds.com

2 Centre requirements – Routes (-11)(-12)(-13)

This section outlines the approval processes for Centres to offer these qualifications 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

Existing centres wishing to offer this qualification will **not** need to gain qualification approval for these qualifications.

2.1 Resource requirements

Human resources

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally knowledgeable in the area(s) of [Customer Service] for which they are delivering training. This knowledge must be at least to the same level as the training being delivered.
- have credible experience of providing training.

Centre staff may undertake more than one role, eg Specialist Tutor and Invigilator, but the specialist tutor must never be the sole invigilator.

Continuing professional development (CPD)

Staff are expected to support their staff in ensuring that their knowledge of the occupational area and of best practice in delivery, mentoring and training, remains current, and 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 these qualifications However, centres must ensure that candidates have the potential and opportunity to successfully gain the qualifications.

Age restrictions

There are no age limits attached to candidates undertaking the qualifications unless this is a legal requirement of the process or the environment.

3 Centre requirements – Routes (-21)(-22)

This section outlines the approval processes for Centres to offer these qualifications 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

There is **no** fast track approval provision for this qualification.

3.1 Resource requirements

Human resources

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally knowledgeable in the area(s) of [Customer Service] for which they are delivering training. This knowledge must be at least to the same level as the training being delivered.
- have credible experience of providing training.

Centre staff may undertake more than one role, eg Specialist Tutor and Invigilator, but the specialist tutor must never be the sole invigilator.

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Age restrictions

There are no age limits attached to candidates undertaking the qualifications unless this is a legal requirement of the process or the environment.

3.3   Quality assurance
This information is a summary of quality assurance requirements.

Providing City & Guilds qualifications gives full details and guidance on:
- internal quality assurance
- external quality assurance
- roles and responsibilities of quality assurance staff.

Internal quality assurance
Approved centres must have effective quality assurance systems to ensure optimum delivery and assessment of qualifications.

Quality assurance includes initial centre approval, qualification approval and the centre's own internal procedures for monitoring quality. Centres are responsible for internal quality assurance, and City & Guilds is responsible for external quality assurance.

External quality assurance

External quality assurance for the qualification will be provided by City & Guilds external moderation process.

External moderation is carried out by appointed examiners to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

4   Units

Availability of units

The units for this these qualifications follow.

Structure of units

The units in these qualifications are written in a standard format and comprise the following
* City & Guilds reference number
* title
* level
* credit value
* unit aim
* relationship to NOS, other qualifications and frameworks
* endorsement by a sector or other appropriate body
* assessment
* learning outcomes which are comprised of a number of assessment criteria
* guidance notes
* unit owner.

Unit 111/021 Principles of Customer Service – Level 1

Level: 1

Credit value: 6

Unit aims
The aim of this unit is to provide the candidate with the skills required to deliver efficient and reliable customer service. They will gain an understanding of customer expectations and needs and will be able to deal effectively with customer queries and complaints.

Learning outcomes
There are **four** learning outcomes to this unit. The candidate will:
* Know how to deliver good customer service
* Know different communication methods
* Know how to provide good customer service in line with organisational procedures
* Know how to effectively deal with customer queries, problems and complaints

Guided learning hours
The recommended Guided Learning Hours (GLH) for the qualification is 30 hours. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 1 N/SVQ in Customer Service.

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by the Institute of Customer Service.

Key Skills
This unit contributes towards the Key Skills in the following areas:
* Communication

Assessment and grading
This unit will be assessed by an externally set and marked test
The question paper will take the form of a series of short answer questions and scenario-based tasks in which it is assumed that the candidate is dealing with customer queries and problems.

Assessment and grading (Hairdressing route (8992-21)
This unit will be assessed by an externally set and internally marked test which will be externally verified.
The question paper will take the form of a series of short answer questions and scenario-based tasks in which it is assumed that the candidate is dealing with customer queries and problems.

Unit 111/021   Principles of Customer Service – Level 1

Outcome 1   Know how to deliver good customer service

Assessment criteria
Underpinning knowledge
The candidate can:
1.1 Identify different types of customers.

1.2 Identify different needs of customers.

1.3 State what is meant by customer satisfaction.

1.4 State what is meant by customer expectations.

Notes for Guidance

1.1   There are many types of customers. A customer can be an individual or an organisation.
        Customers can be internal eg from another part of the same organisation or colleagues;
        external eg individuals; businesses including suppliers. Customers may come from different
        age groups, cultural and social backgrounds or have health, language or learning issues.
        Customers may also have different attitudes eg assertive, angry and confused.

1.2   Customers will have different needs eg for information, assistance, advice, guidance. They
        may want to be served swiftly with little assistance or may require a lot of advice and support.
        Customers may also be those who have very specific special requirements eg health such as
        hearing or sight impaired, mobility, language, age, cultural needs or specific learning
        difficulties. Whatever the needs, the candidate will require first to identify those needs.

1.3   The candidate should be able to identify that customer satisfaction occurs when a customer is
        happy with the service and /or product provided. Customer satisfaction is when a customer's
        needs and expectations have been met.

1.4   Customer expectations are what customers think should happen and how they believe they
        should be treated when asking for or receiving customer service. Customers also have
        expectations of the products they purchase eg they have certain expectations of what the
        products will deliver. The candidate should be able to identify that different customers will
        have different expectations eg meeting timescales, keeping promises, value for money,
        quality presentation, fit for purpose, reliability, easy to use, friendliness of employees.
        Customer expectations are formed eg through what customers see, hear, what they read and
        what 'messages' an organisation sends ie via its reputation and brand and what actually
        happens to them when dealing now and in the past with an organisation.

Unit 111/021   Principles of Customer Service – Level 1
Outcome 2   Know different communication methods

Assessment criteria
Underpinning knowledge
The candidate can:
2.1 State effective methods of communication to use when dealing with different customers.

2.2 State how to use questions when dealing with different customers.

2.3 Identify positive and negative body language and facial expression.

2.4 State how customers' body language impacts on customer service.

2.5 State how own body language impacts on customer service.

Notes for Guidance
2.1   A service deliverer's communication should be clear, respectful, polite, confident, using the appropriate technical terms and adopted to meet individual needs. The different methods of communication are:

- Face-to-face.

- Written communication eg letter, email.

- Telephone and text.

Face-to-face – is about eye contact and active listening. 'Normal' eye contact may differ across cultures; 'active listening is about head nodding, gestures and repeating back phrases that are heard and confirmation of understanding. Face to face can allow the candidate to see when additional assistance in understanding is needed by the customer.

Written communication is eg letter, email, memos and reports. There will be organisational guidelines on when and how to use written communication eg house styles, layout, language to be used etc. A written letter is likely to be necessary when a formal response is required by an external customer while memos and emails are likely to be used for internal communication. However there may be customers who have certain difficulties with written communication and this requires to be recognised.

Telephone communication is a frequently used method of communication but it does require the candidate to speak clearly and slowly to allow for the possibility that reception on the 'telephone line' may not be perfect. They also need to adapt speech to meet the individual needs of customer eg those who do not have knowledge of the language or who are perhaps hearing impaired. Increasingly, text is being used but like written communication it must be clear and easily understood.

2.2   In order to find out customers' requirements, different questions may need to be asked to gain the information required. Some customers will easily give answers but others will require open and probing questioning in order to gain more information. Closed questions are used when a yes or no answer is needed, usually to confirm understanding. Open questions begin with who, what, where, when, why and how.

2.3   Body language is about interpreting facial expressions, gestures and posture, it must be taken into account together with the words a customer uses. Positive body language is eg the candidate makes eye contact with the customer which the customer sees as positive behaviour; or when the candidate smiles. Negative body language is when there is no smile, or the candidate folds their arms and adopts an aggressive stance. Facial expressions can also affect customers as a frown can look unwelcoming, no eye contact can show dishonesty or lack of interest. (Positive and negative body language, along with facial expressions can be perceived differently according to the culture.)

2.4   Positive body language in turn produces positive behaviour. Negative body language can at times produce negative behaviour. The potential impact of a range of negative body language displayed by the customer eg aggression, pointing, hands on hips can in turn make the service deliverer feel nervous or under threat and respond in a defensive manner. Customers who are positive and understanding are likely to encourage a service deliverer to respond in the same way.

2.5   Negative body language by the candidate can turn a positive experience into a negative for the customer. It may escalate a situation or produce a complaint and may affect a customer's perception of the organisation and overall satisfaction. Body language can signal pleasure, anger, frustration or aggression without the candidate realising it and can affect the behaviour of the customer who reacts accordingly.

Unit 111/021   Principles of Customer Service – Level 1

Outcome 3   Know how to provide good customer service in line with organisational procedures

Assessment criteria
Underpinning knowledge
The candidate can:

3.1 State the importance of providing products and services which are 'fit for purpose'.

3.2 State the importance of customer and organisation confidentiality.

3.3 State the limits of own authority.

Notes for Guidance

3.1   It is important to realise that customers have expectations of the products and services being delivered. Products should be of satisfactory quality and fit to do the job they were intended for and the service should meet the promised service offer. Failure to provide products and services which are fit for purpose is likely to damage an organisation's reputation, result in a loss of business and increase the number of complaints.

3.2   The candidate requires to be aware of the need to protect the interests of customers and their respective organisations when working with customer service records. Organisations hold lots of 'personal information' about customers eg account details, addresses and this information cannot be disclosed to anyone who asks for it. They should understand that there is a need to maintain confidentiality as it may be a legal requirement. However, there should also be an understanding that any loyalty and goodwill which exists between customers and the organisation will be lost if confidentiality is breached. If sensitive details were given out, it would result in a loss of the customer and of their trust.

3.3   The candidate should be aware that many organisations have recognised systems and procedures eg for solving and dealing with customer problems and complaints and they should be aware that within those systems and procedures there are guidelines on what they are allowed to do and what not. In every organisation there will be procedures that will detail exactly what an employee can do and when they should refer to others. The reason there are limits is because there needs to be consistency in the way customer service is delivered. There are times when certain tasks can only be carried out and decisions made by those with the relevant training and experience and the appropriate level of responsibility.

Unit 111/021   Principles of Customer Service – Level 1

Outcome 4   Know how to effectively deal with customer queries, problems and complaints

Assessment criteria
Underpinning knowledge
The candidate can:
4.1 State how to deal with customer queries.

4.2 Identify common customer problems and complaints.

4.3 State how to deal with problems and complaints.

Notes for Guidance

4.1   The candidate should understand it is always vital to communicate in a clear, polite and confident way, following organisational procedures. Queries should be dealt with swiftly and accurately. The candidate should listen carefully to what has been stated and confirm understanding. When dealing with queries, it is always important to keep the customer informed of what is happening and to ensure the most up to date information and advice is referred to.

4.2   The candidate should be able to identify a variety of common customer problems and complaints. Customers complain when their needs and expectations are not met eg faulty goods, poor quality, price, value, incorrect stock, failure to return calls, failure to meet deadlines, poor attitude of staff. They should also realise that they, through their attitude, lack of knowledge etc, can contribute to a complaint or cause a problem.

4.3   Complaints are a valuable source of customer feedback and assist in the process of continuous improvement. In dealing with a problem or complaint, the candidate should remain calm at all times. Candidates should acknowledge the complaint or problem, listen carefully to the customer, empathise with them and arrive at a mutually acceptable solution which may be to consult with or refer to others. The candidate needs to be aware that their positive attitude in dealing with a problem can prevent it becoming a complaint.

Unit 112/022   Principles of Customer Service – Level 2

Level: **2**

Credit value: 8

Unit aims

The aim of this unit is to provide the candidate with the skills required to deliver efficient and reliable customer service. They will gain an understanding of the importance of an organisations customer service policies and procedures. Candidates' will learn how to communicate effectively with different types of customer.

Learning outcomes

There are **six** learning outcomes to this unit. The candidate will:

1 Know how to deliver good customer service to different types of customers
2 Know organisational customer service policies and procedures
3 Understand the benefits to an organisation of having a good reputation
4 Understand the qualities and attributes required in the customer service role
5 Understand importance of responding effectively to customers' needs, expectations and complaints
6 Understand the importance of different methods of communication used to deal with different types of customers.

Guided learning hours

The recommended Guided Learning Hours (GLH) for the qualification is 60.This may be on a full-time or part-time basis.

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

This unit is linked to the Level 2 N/SVQ in Customer Service.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Institute of Customer Service.

Key Skills

This unit contributes towards the Key Skills in the following areas:

* Communication

Assessment and grading

This unit will be assessed by an externally set and marked test

The question paper will take the form of a series of short answer questions and scenario based tasks in which it is assumed that the candidate is dealing with customer queries and problems.

Assessment and grading (Hairdressing route (8992-22)

This unit will be assessed by an externally set and internally marked test which will be externally verified.

The question paper will take the form of a series of short answer questions and scenario-based tasks in which it is assumed that the candidate is dealing with customer queries and problems.

Unit 112/022   Principles of Customer Service – Level 2

Outcome 1   Know how to deliver good customer service to different types of customers

Assessment criteria
Underpinning knowledge
The candidate can:
1.1 Describe different types of customers.

1.2 Describe different types of customer needs.

Notes for Guidance

1.1   The candidate should be able to identify that there are different types of customers and describe how they should adapt their behaviour to deal with each type. A customer can be an individual or an organisation. Customers can be internal, eg from another part of the same organisation or colleagues; external, eg individuals, businesses including suppliers. Customers may also be those who require special assistance for example those who have specific requirements eg health, language, age, cultural needs or who have specific learning difficulties. Customers may also be assertive, angry, confused, know what they want or require a lot of assistance.

1.2   Customers have different needs eg they may want to be served swiftly with little assistance or may require a lot of advice and support. Customer needs may be for example for:

- General information, eg directions, facilities, price, availability.

- Health, safety and security.

- Assistance, eg for elderly parents who need help with mobility access.

- A certain level of service, eg that timescales are met, promises kept, value for money, quality presentation.

- Help identifying products and services to meet their expectations.

- More detailed, up to date product knowledge.

Customers may also be those who have very specific requirements eg health related such as hearing or sight impairment or language/age-related/cultural needs or learning difficulties. Whatever the needs the candidate will require first to identify those needs, deal with them appropriately adapting their behaviour where necessary.

Unit 112/022　Principles of Customer Service – Level 2

Outcome 2　　Know organisational customer service policies and procedures

Assessment criteria
Underpinning knowledge
The candidate can:
2.1 Describe the benefits to an organisation of having a customer service policy.

2.2 Explain how an organisation's customer service policy contributes to good customer service.

2.3 State the types of information and records an organisation keeps about its customers.

2.4 Describe the purpose of different organisational customer service policies and procedures.

Notes for Guidance

2.1 The candidate should be able to explain what is meant by a customer service policy and how it impacts on the service given and expected. Customer service policies normally include guidance to customers on eg how to make a complaint/follow grievance procedures, the refund policy to be applied and timescales to be followed. It also dictates to the service deliverer how the customer should be dealt with and the level of customer service to be given.

The customer service policy sets the basis on which the organisation will provide a service to its customers. The customer will know this is what they can expect while the organisation will know what to deliver. The benefit of having a customer service policy is that it enhances the customer service of the organisation which can in turn increase the level of business.

2.2 The candidate should be able to explain that a customer service policy ensures there is a consistent delivery of customer service and indicates to the customer what they can expect and how to complain if they do not get it.

A customer service policy may also indicate to the customer the organisation's ethical standards. Ethical standards influence how decisions are made when resolving customer problems and the behaviour of employees towards customers. Organisational ethics include personal qualities such as responsibility, integrity, and honesty, but also:

- openness
- ethical leadership
- pride in reputation
- social awareness.

2.3   The candidate should understand that there is a variety of sources of customer information which might be appropriate to use in support of the customer service process. They should understand that organisations have processes and procedures relating to the recording and storing of customer service information and the keeping of records.

The candidate needs to be able to identify a range of customer service records eg basic customer details such as name, address etc; notify a change in personal circumstances such as change of address; notify a change to a regular order; place a new order; complain or say 'thank-you'; give feedback on a product or service; user evaluation; make a warranty/guarantee claim. There may also be legislation impacting upon the recording, storing and processing of customer information.

2.4   Organisations will have customer service policies and procedures which will dictate how customers should be dealt with and the level of service to be offered. They may have policies and procedures relating to:

- Service standards
- Feedback systems
- Complaints procedures
- Emergency procedures

Organisations write procedures for staff to follow to ensure that a specific job or task is completed in a set way to achieve the same outcome and level of service. A procedure may also be in place to ensure that legislative requirements are met.

Unit 112/022   Principles of Customer Service – Level 2

Outcome 3   Understand the benefits to an organisation of having a good reputation

Assessment criteria
Underpinning knowledge
The candidate can:

3.1 Describe the benefits of a good reputation for an organisation.

3.2 Explain how an organisation can build a good reputation.

3.3 Explain what can damage an organisation's reputation.

Notes for Guidance

3.1   The benefits of a good reputation can be:

- increased sales
- fewer complaints
- new customers
- increased compliments
- repeat business/brand loyalty
- referred business
- increased market share
- reduced staff turnover
- job satisfaction and staff motivation.

Having a poor reputation leads to eg a loss of business, a downturn in profits and is difficult to change. When things go wrong, the candidate should understand that an organisation can recover from a bad situation with an individual customer if there is a good previous background of achieving customer satisfaction: customer loyalty may exist and the customer may be won back. Candidates should understand therefore that it is easier and cheaper to retain existing customers than attract new ones.

A good reputation means the organisation has a loyal customer base and through word of mouth from those customers can increase this customer base.

3.2   To build a strong reputation means that an organisation has to attract customers to use its products or services, put things right if they go wrong, create a positive impression and build its reputation over time. To improve its reputation an organisation has to listen to its customers, meet their needs and expectations and respond to feedback. To build a good reputation an organisation should also provide a consistent and transparent service offer and have a fully trained and professional staff to implement this, monitoring the effectiveness of this service offer over time.

3.3 Damage to an organisation's reputation can be caused in many ways. The candidate should be able to explain that customer expectations are influenced by the experience they expected from the organisation and from experiences they have had in similar service sectors eg hotels, restaurants, supermarkets, travel. The way an organisation deals with customers, the service it gives, the quality of the products/service offered and how customers are dealt with should problems occur, all impact on an organisation's reputation. The candidate should be able to explain that all customer experiences, good and bad, will build into an overall impression of the quality of an organisation.

An organisation's reputation can be damaged by:

- inefficient or untrained staff
- poor service
- poor staff attitude
- not fulfilling promises
- poor value for money
- poor quality of products
- products not fit for purpose
- disclosing customer details/information therefore betraying customer trust
- unethical practices.

Unit 112/022   Principles of Customer Service – Level 2

Outcome 4   Understand the qualities and attributes required in the customer service role

Assessment criteria
Underpinning knowledge
The candidate can:

4.1   Describe the key qualities required in the customer service role eg professionalism, communication skills and appropriate body language.

4.2   Describe the key attributes required in a customer service role.

4.3   Describe how to present a professional and knowledgeable image to customers.

Notes for Guidance

4.1/4.2   The candidate should be able to describe the qualities a customer service deliverer needs in their 'toolkit' and the key attributes required.

Professionalism – having the right attitude to achieve customer satisfaction whilst ensuring the needs of the organisation are also met; being aware of the importance of creating a good first impression in terms of personal presentation, attitude and behaviour; always being professional despite difficult circumstances eg being under pressure through lack of time, during busy periods; being aware of what the organisation expects of its service deliverers; knowing what you can do within the limits of your authority; having the appropriate knowledge; keeping promises and building customer trust.

Communication skills – The candidate should be able to list the different ways of communicating with customers eg face-to- face, by telephone, in writing (email, letter, fax). They should be able to describe the key principles associated with each method of communication.

Appropriate body language – The candidate should be able to explain that interpreting body language should not be taken in isolation from the words a customer uses. They should be able to explain body language is about interpreting facial expressions, gestures and posture and it needs to be taken into account together with the words a customer uses.

They also need to understand that they convey messages to others through their own body language and be able to describe the potential impact of a range of body language variations, eg standing very close to a customer versus standing at a distance, folded arms versus open arms, giving lots of eye contact, giving no eye-contact, frowning versus smiling.

Inter-personal skills – The candidate should understand the interpersonal skills required in a customer service role which include effective listening, decision-making, questioning skills, telephone techniques, IT skills, team-working skills, problem-solving skills, personal development skills and information gathering skills.

Team working - The candidate needs an understanding of what effective team-working is all about, eg working co-operatively with colleagues, showing sensitivity to the needs and

feelings of others, working effectively with others to complete an allotted task, responding positively to requests for help or support.

4.3   In order to present a professional and knowledgeable image to customers, the candidate should ensure their knowledge is up to date at all times and be able to identify the sources of information about products and/or services within their customer service environment. These could include: catalogues, brochures, price lists, colleagues, internet, intranet, training sessions, organisational product and/or service information/literature, word of mouth from customers. Candidates should also be able to explain how they use these sources of information to keep up to date eg by frequently checking the validity of the information they use, asking colleagues, checking the organisation's website/newsletters/intranet/in-house magazines, attending team meetings and product /service awareness sessions. With this knowledge and good communication skills they should be able to approach customers confidently thus presenting a professional image.

A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good impression is vital – there is no second chance to create a good first impression.

Service deliverers should always be professional despite difficult circumstances eg being under pressure through lack of time, during busy periods.

Unit 112/022 Principles of Customer Service – Level 2

Outcome 5 Understand importance of responding effectively to customers' needs, expectations and complaints

Assessment criteria
Underpinning knowledge
The candidate can:

5.1 Describe how to identify and confirm a customer's expectations.

5.2 Explain the importance of responding promptly to a customer seeking assistance.

5.3 State the importance of keeping the customer informed and reassured.

5.4 State the importance of explaining to customers when their needs or expectations cannot be met.

5.5 Explain the importance of gathering feedback to help meet customers' expectations.

5.6 Describe methods of gathering customer feedback.

Notes for Guidance

5.1 Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Customer expectations are formed eg through what customers see, hear, what they read and what 'messages' an organisation sends, ie via its reputation and brand and what actually happens to them when dealing now and in the past with an organisation.

The candidate should recognise that customers' expectations may differ from what they actually need or what the organisation is prepared to supply. The candidate should be able to explain that a service deliverer needs to be able to judge customers' expectations by identifying and understanding their needs. This happens through the use of well-developed inter-personal skills which enable a service deliverer to accurately identify customers' needs and then confirm understanding. In identifying customer needs the candidate will use open questioning ensuring they listen carefully to the responses, using probing questions to gather further information. Finally they will use closed questions to confirm their understanding.

5.2 A prompt response is needed for customers at all times - during routine delivery of customer service, during a busy period for the organisation, during a quiet period for the organisation, when people, systems or resources have let the customer down. Customers expect to be dealt with promptly and failure to do this can result eg in a basic request for assistance turning into a complaint or problem as the customer becomes frustrated; loss of that customer as they may go to a competitor; loss of reputation as the customer tells others by word of mouth of the poor customer service they receive.

It is important to deal properly and promptly with any customer complaint within the organisation's recognised systems and procedures for doing so, in order to retain the customer.

Learners must know the procedures for handling customers' complaints, which will include:

- acknowledging the complaint
- apologising for inconvenience
- prompt attention to situation
- identifying questions to answer
- investigate the complaint
- identifying problems to resolve.

Strategies to deal with complaints involve avoiding conflict and not reacting to possible anger from customers face-to face, on the telephone or in writing.

Use the HEAT strategy (Hear, Empathise, Apologise, Take ownership).

5.3 Customers have expectations that if they are told they will be kept informed, then this will happen. Failure to do this can frustrate a customer, turning a basic query into a possible complaint or problem. It is especially the case that when a customer is concerned or has made a complaint, that they are kept informed and reassured of actions being taken. Keeping promises to maintain contact with a customer is important and builds a relationship with the customer and creates loyalty. An organisation's reputation can be damaged through not maintaining contact with customers. Even when on the telephone, it is important to ensure customers are kept informed, and regularly updated, and told if they are going to be 'on hold'.

5.4 The candidate should understand customer service is not just about saying 'yes' to customers. They should understand it is necessary to balance the needs of both customer and organisation. This may involve them in influencing the customer and negotiating with the customer in order to reach an agreement. The candidate should be able to describe how to explain to a customer why their needs and expectations cannot be met, explaining that the organisation has policies and procedures that need to be followed and ensuring the customer leaves with a positive feeling towards the organisation despite not getting what they may have wanted.

5.5 Customer expectations are constantly changing and the candidate needs to understand that organisations use customer feedback to continuously improve their customer service systems and procedures and meet those changing expectations. Customer feedback can let an organisation know when customers are unhappy or dissatisfied, allowing them to address the situation with the customer or make any necessary changes to their customer service. Customer feedback needs to be gained, as failure to find out customer expectations or about customer dissatisfaction could lead to the loss of the customers. Complaints should be viewed as a valuable source of direct customer feedback on a product or service and analysis of a complaints log can assist in the process of continuous improvement.

Positive customer feedback can be motivational and should always be fed back to staff.

5.6 Customer feedback is what the customer reports back to an organisation about the customer service experience. Customer feedback can be informal, ie gathered through the noting of spontaneous customer feedback such as chance remarks or comments, verbal or in writing, made by customers without being asked; and/or through formal methods of gathering customer feedback eg:

- Questionnaires.
- Surveys.
- Service calls.
- Interviews.
- Consumer panels.
- Suggestions box.
- Complaints log.

Unit 112/022   Principles of Customer Service – Level 2

Outcome 6   Understand the importance of different methods of communication used to deal with different types of customers

Assessment criteria
Underpinning knowledge
The candidate can:

6.1 Select the most appropriate way of communicating with a customer to meet their needs.

6.2 Explain how non-verbal communication affects the behaviour of the customer.

6.3 Explain the importance of communicating with the customer that their expectations have been fully understood.

Notes for Guidance

6.1   Candidates should realise it is important to adapt methods of communication to meet the individual needs of a range of customers including those:

- with language difficulties
- with health issues
- of different age groups
- with cultural differences
- with learning difficulties.

For example, where there are language difficulties it may require that the candidate talks more slowly, clearly and without the use of jargon. The candidate should understand it is always vital to communicate in a clear, polite and confident way. By judging a customer's expectations and by identifying and understanding their needs, candidates should be able to explain that this may often mean they have to adapt their own behaviour and how they communicate with the customer.

The different methods of communication are:

- face-to-face
- written communication eg letter, email
- telephone and text.

Face-to-face – is about eye contact and active listening. 'Normal' eye contact may differ across cultures. Being a good or active listener ensures the exchange of information between the speaker and the listener is correctly understood.

To listen actively:

- make eye contact
- pay attention to the words, expressions, and body language of the speaker
- use positive body language to express your continued concentration
- use encouraging phrases such as "I see" or "Go on"
- do not interrupt – allow the speaker to finish
- give the person your complete attention
- summarise the discussion to bring the conversation to a close.

Face to face can allow the candidate to see when additional assistance in understanding is needed by the customer.

Written communication is eg letter, email, memos and reports. There will be organisational guidelines on when and how to use written communication eg house styles, language to be used etc. Written communication will be necessary when a formal response is required by the customer. However there may be customers who have certain difficulties with written communication and this requires to be recognised.

Telephone communication is a frequently used method of communication but it does require the candidate to speak clearly and slowly to allow for the possibility that reception on the 'telephone line' may not be perfect. They also need to adapt speech to meet the individual needs of customer eg those who do not have knowledge of the language or who are perhaps hearing impaired. Increasingly text messaging to mobile (cell) telephones is being used but, like written communication, it must be clear and easily understood.

6.2   Non-verbal communication or body language is about the use of facial expressions, gestures and posture when communicating. The candidate should be aware that a service deliverer also conveys messages through their own body language, negative versus positive, eg standing very close to a customer versus standing at a distance; folding arms versus open arms; giving lots of eye contact, giving no eye contact; frowning versus smiling. Body language can signal pleasure, anger, frustration or aggression without you realising it and can affect the behaviour of the customer who reacts to what they perceive the message to be and vice versa.

They should also understand how their own personal presentation, approach and attitude will influence the customer's perception of the service delivered and also influence the perceived image of the organisation.

6.3   Different types of customers have different expectations about what they think should happen and how they think they should be treated. However no matter the type of customer, it is important to meet their expectations and confirm with them that they have been understood correctly and met. It is easy to assume that expectations have been met but important to check this and to ensure the customer agrees in order to achieve customer satisfaction.

The candidate should be able to identify customers who know what they want, others who have a vague idea of what they want, customers who are confused, customers who are angry or abusive. They should understand that those who know what they want, need a fast and efficient service or sale that immediately meets their needs; those who have a vague idea of what they want will need more work with relevant questions being asked and the relevant products or services being suggested; those who are confused will need more time with more explanation being given on the services/products and more time spent to ensure that the

products/services being offered are understood by the customer and meet their needs. The candidate should be able to explain why those who are angry or abusive will need to be dealt with calmly and why a situation or problem will need to be resolved to their satisfaction.

Techniques to ensure understanding of customer expectations include paraphrasing, clarifying, probing, verifying and summarising.

Unit 113   Principles of Customer Service – Level 3

Level: 3

Credit value: 10

Unit aims

The aim of this unit is to provide the candidate with the skills required to deliver efficient, reliable customer service and to give them an understanding of the benefits of developing their own as well as others skills within the customer service environment. In addition, they will understand how customer service can be developed, monitored and improved.

Learning outcomes

There are **seven** learning outcomes to this unit. The candidate will:

- Know the key features of a service offer and its effects on customer expectations
- Know how to deliver reliable customer service
- Understand how to deal with different customer behaviours to ensure customer satisfaction
- Understand how customer service can be developed and improved
- Understand how the promotion of products and services can benefit the customer and the organisation
- Understand the benefits of team-working in delivering good customer service
- Understand how to develop the customer service skills of self and others

Guided learning hours

The recommended Guided Learning Hours (GLH) for the qualification is 90 hours. This may be on a full-time or part-time basis.

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

This unit is linked to the Level 3 S/NVQ in Customer Service.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Institute of Customer Service.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- Communication
- Application of number
- Improving own learning and performance

Assessment and grading

This unit will be assessed by an externally set and marked test.

The question paper will take the form of a series of short answer questions and scenario based tasks in which it is assumed that the candidate is dealing with customer queries and problems.

Unit 113 Principles of Customer Service – Level 3
Outcome 1 Know the key features of a service offer and its effects on customer expectations

Assessment criteria
Underpinning knowledge
The candidate can:

1.1 Describe the key features of a service offer and how this can be affected by financial and other resource limitations.

1.2 Explain how a service offer can be affected by financial and resource limitation

1.3 Describe what effects the service offer may have on the customer's expectations.

1.4 Explain how customer expectations are formed.

Notes for Guidance

1.1 A service offer or customer charter exists between customers and their service provider. The service offer sets the basis on which the organisation will provide a service to its customers. Customers will know that this is what they can expect while organisations know what they must deliver. Service offers cannot cover everything a customer may want, but key features may include:

- quality of product/service
- timescales for responses
- guarantees
- accessibility/equal opportunities
- ethical promises
- complaints procedure
- refunds and compensation policy
- appeals procedure.

In summary, it collectively states the level of service by recording the common understanding about services, priorities, responsibilities and guarantees.

The candidate should also understand that organisations may enter into contractual agreements with customers, the implications of these contracts and that they may be legally binding.

A service level agreement usually exists between organisations to specify the level of service to be provided, eg between an organisation and an IT help desk provider.

1.2 A service offer or service level agreement will be affected by financial and resource limitations which will determine what can be offered. An organisation needs to survive and needs to consider the budget and resources they have available before drawing up its service offer, eg it will not offer a 24-hour service if the staff are not available or the need for such a service is not financially viable. The economic position and resources available to an organisation, may

mean that the service offer needs to be reviewed in order to reflect a realistic level of service. Legislation may also impact upon service delivery and the service offer.

1.3 The candidate should recognise that customer expectations are affected by the service offer in terms of quality, price and performance.

1.4 Expectations are formed:

- through what customers hear and see
- what customers read and the messages the organisation sends (ie via its reputation and brand)
- by what actually happens to customers when dealing now and what happened in the past with an organisation.

Customer expectations will be specific to different industries but broadly fall into expectations about:

- level of service
- value for money
- hygiene and health and safety
- luxury factor.

Customer expectations are heavily influenced by word of mouth (eg friends and family) and the media, brand reputation, changing trends and advertising. Customers may also have had experiences with similar organisations which impact upon their overall impression and expectations of that particular sector.

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. If they do not receive this level of service they will be disappointed and customer loyalty may be lost and the reputation of the organisation damaged. The candidate should recognise customer expectations are constantly changing and in order to continue to meet or exceed expectations, organisations seek continuously to review their customer service offer, dependent on finance and resources available.

Unit 113 Principles of Customer Service – Level 3

Outcome 2 Know how to deliver reliable customer service

Assessment criteria
Underpinning knowledge
The candidate can:

2.1 Describe how staff resource implications can affect the delivery of reliable customer service.

2.2 Explain the need to have reliable information for customers and identify the sources of this information.

2.3 Explain the need to have effective systems for recording, storing and retrieving feedback.

2.4 Describe how to identify useful customer feedback.

2.5 Describe how to decide which feedback should be used.

2.6 Explain the need to maintain the security and confidentiality of data.

2.7 Describe the potential impact on the customer and organisations of not maintaining confidentiality of data.

Notes for Guidance

2.1 Having sufficient well trained and professional staff is very important in providing reliable customer service. Staff should be fully trained in the organisation's procedures in order to provide consistent service and with a sufficient skills base, in order to lessen the impact on service level of any increase in demand through, eg staff absence, promotion or advertising campaign, seasonal issues. Lack of staff will result in customers waiting for assistance and possibly going elsewhere. Lack of staff can also result in loss of sales and damage to a previously good reputation. If there are insufficient staff, customers can become angry and the number of complaints is therefore likely to increase. Supervisors and managers need to plan for adequate staff resources to be available to cover busy or exceptional circumstances. Customers should be able to expect the same level of service during a busy period for the organisation, during a quiet period for the organisation, or when people, systems or resources have let them down.

2.2 The candidate should be able to recognise that individual staff members need knowledge and skills to support the customer service offered. Professional and knowledgeable staff can approach customers with confidence and ensure that they in turn are confident in the information and service they give. A lack of knowledgeable, well-informed staff can result in misinformation being given to customers and customers losing faith in the reliability of the information and the organisation itself. The candidate should be able to identify sources of relevant and reliable information about products and services eg inter/ranet, competitors, trade associations, trade magazines, newspapers, catalogues, brochures, price-lists, trade fairs, training sessions, colleagues.

2.3 Customer feedback provides information on the service being given and how it is meeting customer expectations. The organisation will be able to monitor and analyse performance from this feedback. Not recording customer feedback can result in missing changes to customer expectations and needs, and a loss of those customers. It is important that the feedback is recorded be it informal eg remarks made by the customers or formal eg from questionnaires, analysed and used to improve the customer service offered. Record-keeping system for customer complaints, feedback on products, purchase trends can also be used to monitor customer service delivery. The candidate should be able to explain how analysis of records can help to identify trends in customer service delivery. These trends might lead to a need for process improvement or they might suggest that an individual's performance needs addressing.

The candidate should be able to give specific examples of how feedback collected, recorded and analysed has contributed towards continuous customer service improvement.

It is also important to note that information recorded must also need to meet legislative requirements.

2.4/2.5 Customer feedback can be collected using a range of methods eg informal - asking questions verbally during discussion either face-to-face or on the telephone; recording unsolicited customer comments; spontaneous customer feedback, or formal eg formal interviews, one to one, or in a group; written questionnaires; focus groups; street surveys; telephone surveys; direct mailings; mystery shoppers; suggestion boxes.

The effectiveness of each method of gathering customer feedback would depend on the situation it was used in. The cost and percentage of response for example would have to be considered as a lack of response is unlikely to give useful information. Effective feedback requires that the initial method asks the required questions and targets the correct group. Formal feedback is where set questions are asked to find out specific detail while informal feedback tends to be spontaneous and; while useful information can be obtained, it is not gathering data on specifics. Formal methods of gathering feedback can be aimed at a specific group of customers and will be structured to ensure it gathers the feedback required.

Analysis of records can help to identify trends in customer service delivery. These can be records of sales, results from advertising etc. Other results from a variety of methods of gathering customer feedback should be analysed but not all may be reliable eg a drop in sales may indicate the customer service offered is not meeting expectations. However, this would need to be backed up by eg a customer survey as the fall in sales may be due to the product being unpopular rather than poor customer service.

2.6/2.7 Protecting confidential information is a business requirement, and in many cases also an ethical and legal requirement. Information security means protecting information and information systems from unauthorised access, use, disclosure, disruption, modification, or destruction. Any loyalty and goodwill which exists between customers and the organisation will be lost if confidentiality is breached.

Possible outcomes of not protecting both customer and organisation information are, eg ID theft, industrial espionage, competitor advantage, unsolicited marketing, legal action.

Not maintaining customer confidentiality could result in breaking the law, a breach of trust and loss of faith by the customer. Organisations may lose customers and reputation as a result of the breach of confidentiality.

Unit 113 Principles of Customer Service – Level 3

Outcome 3 Understand how to deal with different customer behaviours to ensure customer satisfaction

Assessment criteria

Underpinning knowledge

The candidate can:

3.1 Explain how the behaviour of customers can influence the level of customer satisfaction.

3.2 Explain the social and cultural differences which govern behaviour and affect customer behaviours.

3.3 Explain how to adjust own behaviour when dealing with customer dissatisfaction.

3.4 Describe how to deal positively with different customer behaviours and personalities when managing problems and complaints.

Notes for Guidance

3.1 The candidate should understand how misunderstanding behaviour and making assumptions potentially lead to customer dissatisfaction. Positive behaviour in a customer in turn is likely to produce positive behaviour in the service deliverer. Negative behaviour can in turn produce a negative response. The potential impact of a range of negative body language variations displayed by the customer can include aggression, pointing, hands on hips and these can in turn make the service deliver feel nervous or under threat and respond in a defensive manner and customer service satisfaction is less likely to be achieved. Customers who are positive and understanding are likely to encourage a service deliverer to respond in the same way and so ensure satisfaction is achieved.

3.2 Customers are different. There are customers who have specific needs because of health, language, age, or cultural differences or who have specific learning difficulties or other general day-to-day requirements. They will all behave differently and this needs to be recognised. Service deliverers need to recognise eg age can affect behaviour, knowledge and understanding and expectations of the customer; social and cultural differences may affect the non-verbal communication of customers and what they see as being acceptable behaviour.

3.3 The candidate should also understand they have to adjust their own behaviour when dealing with customers who have problems or who have complained and who have a variety of expectations as a result eg

- Use calming techniques – empathise, acknowledge the problem.
- Listen effectively.
- Act to diffuse negative emotions.
- Use assertiveness skills.
- Negotiate.

3.4 When dealing with customer dissatisfaction and the different customer behaviours and personalities, the candidate will require to understand the steps of the problem solving cycle:

- Understand the problem.
- Identify the cause.
- Discuss the solution.
- Solve the problem.

They will need to understand that some customers will require more prompting while others will need a softer approach, some may need referral to a higher authority while others need a friendly and more understanding approach.

Strategies to deal with complaints – reacting to possible anger from customer face-to face, on the 'telephone or in writing, etc; avoiding conflict; keep your customers by taking the HEAT (Hear, Empathise , Apologise, Take Ownership).

The candidate should understand what constitutes an effective apology in writing, on the telephone or face-to-face.

Unit 113 Principles of Customer Service – Level 3

Outcome 4   Understand how customer service can be developed and improved

Assessment criteria

Underpinning knowledge

The candidate can:

4.1 Describe methods of measuring current customer service standards.

4.2 Describe methods of analysing customer feedback to improve customer service standards.

4.3 Describe how to implement and evaluate improvements to customer service standards.

Notes for Guidance

4.1   A range of techniques can be used to monitor customer service delivery:

- Use of key performance indicators (KPIs).
- Analysis of customer feedback.
- Analysis of complaints log.
- Analysis of other records eg sales, Management Information Systems (MIS).
- Industry quality/benchmark awards.
- Use of mystery shopper/diner etc.
- Reviewing standards, eg SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.
- Review of reputation/press coverage.

4.2   Any feedback collected, recorded and analysed contributes towards continuous customer service improvement. Analysis of records can help to identify trends in customer service delivery. These can be records of sales, results from advertising etc. These trends might link to a need for process improvement or they might suggest individuals' performance needs addressing.

Such analysis may:

- identify areas for improvement
- identify areas of good practice
- indicate a review of policies/procedures/customer charter
- identify training needs
- re-evaluate customer needs/expectations
- implement initiatives.

4.3   Organisations need to aim constantly to maintain and improve the level of service offered to customers in order to maintain and increase custom and stay ahead of competition. It is only through regular monitoring and review of the service that they are able to do so.

The process of continuous improvement is:

- Feedback from customers
- Areas for improvement identified
- Change proposed and implemented
- Feedback on change
- Evaluate change
- Amend implemented change.

All changes need to be evaluated to assess success or otherwise and before making any subsequent changes. Any change should be monitored and reviewed. Any monitoring or review must consider the impact the change has had on customers, employees and the organization, and further improvements may be needed before a change can be deemed successful.

Unit 113 Principles of Customer Service – Level 3

Outcome 5 Understand how the promotion of products and services can benefit the customer and the organisation

Assessment criteria

Underpinning knowledge

The candidate can:

5.1 Explain how an organisation can promote additional services or products to customers.

5.2 Describe the main factors that influence customers to use an organisation's services or products.

5.3 Describe methods of communicating information about services or products to customers.

5.4 Explain how Unique Selling Points (USPs) are used to differentiate service offers from that of competitors or comparable organisations.

5.5 Explain how USPs are directly related to why customers choose to do business with organisations by using their products or services.

Notes for Guidance

5.1 An organisation can promote additional services or products to customers (cross-selling and upselling, add-ons and upgrades) when they are selling the original product or service eg where an existing 'gas' customer is encouraged to take additional services such as 'electricity' or 'telecoms'. The candidate should understand how features and benefits are used in promotions to influence customer choice and how they can sell the benefits of additional products to a customer.

Additional products/services can be promoted:

- face to face
- on the telephone, using text messaging
- in writing
- via a website.

5.2 Customers are attracted to an organisation which is likely to meet their needs and expectations eg where timescales are met, promises kept, value for money given, quality of product/presentation assured, where the employees are knowledgeable and friendly, and the products are fit for use/purpose, are reliable, easy to use.

Customers buy benefits and solutions. Candidates should be familiar with the technique of selling benefits of the features and know how these compare with those of competitors.

Benefits can be:

- security/peace of mind
- time savers
- money savers
- health and safety
- status
- convenience
- comfort
- flexibility
- enjoyment
- to comply with legislation.

5.3 Many methods of communicating information are available to organisations eg

- Website.
- Promotional methods.
- Service calls.
- Information sheets, newsletters.
- Via staff – face to face, telephone.

Ways of promoting a product or service include:

- Advertising – TV, radio, newspaper, leaflets.
- Word of mouth.
- Telesales.
- Publicity and sales promotion.
- Merchandising – point of sale displays, window displays, samples.
- Sponsorship – sports events, tv programmes.
- Product placement – in films and tv programmes.

5.4 A unique selling point or proposition (USP) defines an organisation's competitive advantage, eg price, packaging, performance, market perception, quality, availability. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing, thus influencing the customer's choice of products and services.

The candidate should be able to define what a USP is, ie a unique feature of the product or service and explain the benefits for an organization, eg electric car; attracting environmentally-aware customers. A USO (Unique Service Offer) is used to differentiate a service offer from that of competitors or comparable organisations, eg price match.

5.5 USO/USPs are directly related to why customers choose to do business with organisations. A customer is attracted to an organisation by the USP/USO that differentiates it from its competitors. A USP may be price, quality etc and is the key attraction.

Unit 113   Principles of Customer Service – Level 3

Outcome 6   Understand the benefits of team-working in delivering good customer service

Assessment criteria

Underpinning knowledge

The candidate can:

6.1 Describe the importance of effective teamwork and service partnerships for the delivery of good customer service.

6.2 Explain how a team contributes to organisational aims and objectives.

6.3 Explain how team dynamics impact upon performance and the achievement of customer satisfaction.

6.4 Describe how good customer service can provide added value and a competitive advantage for an organisation.

6.5 Explain why customers buy benefits and solutions not products.

Notes for Guidance

6.1 A service partnership can be formed between two organisations or two departments of the same organisation in order to provide more effective customer service. The service partnership model encourages teamwork and co-operation rather than identifying one party as the internal customer of the other. For a service partnership all those involved in the delivery of a product or service must work together. If one person, department or organisation does not work as part of the team there will be a 'break' in the partnership and so the flow of effective and reliable customer service can fail.

A team is effective when:

- everyone understands what the common goals are that they are trying to achieve
- everyone has a role in the team and understands the role of each member
- everyone is supportive
- there is trust, respect and open communication
- everyone shares responsibility for the work
- there is effective leadership.

6.2 All team members should be made aware of organisational goals and how to access information on them. The candidate should understand how the team contributes to an organisation's aims and objectives (eg meeting targets, fulfilling job roles). They should be able to recognise how individual team members need knowledge and skills as defined by an appropriate role profile to support the achievement of these aims and objectives. Understanding the roles of other teams is likely to mean meetings with other teams, sections or departments.

6.3   Team dynamics are the unseen forces that operate in a team between different people or groups. Personality styles, job roles, organisational culture, technology, procedures, office layout can all affect the dynamics of a team and affect the performance of the team. If the team consists of eg a range of personality styles that cannot work together, the customer may suffer through staff dissatisfaction or inability to work together to solve customer problems. As a result, customer satisfaction may suffer through the poor service given.

Candidates should be aware of the various theorists on team dynamics, such as Belbin.

6.4   The candidate should be able to describe how good customer service can add value to an organisation eg in repeat business, customer loyalty, brand recognition. Good customer service is vital for the survival of an organisation and can make an organisation more successful than its competitors as customers feel confident in using an organisation offering good customer service, rather than one offering the same products or services but without the added value of good customer service. Customers will also let others know through word of mouth of organisations offering good customer service.

6.5   Candidates should understand that customers buy the benefits and solutions that the features of a product or service offer. For example, the half-load facility on a washing machine offers the benefit of convenience and economy. Benefits can be:

- security/peace of mind
- time savers
- money savers
- health and safety
- status
- convenience
- comfort
- flexibility
- enjoyment
- to comply with legislation.

Unit 113 Principles of Customer Service – Level 3

Outcome 7   Understand how to develop the customer service skills of self and others

Assessment criteria

Underpinning knowledge

The candidate can:

7.1 Describe how to identify personal strengths and development needs of self and others.

7.2 Explain how and when methods of assessing individual performance can be used.

7.3 Explain how to create a personal development plan to improve the customer service skills of self and others.

7.4 Describe how to obtain and respond positively to constructive personal feedback from others.

7.5 Explain how to give useful and constructive personal feedback to others.

Notes for Guidance

7.1   The methods of assessing and monitoring individual and team performance include eg observation, psychometric testing, training needs analysis (TNA), feedback, questioning, one-to-one meeting, appraisal. The appropriateness of the method used will need to be considered eg cost implications, interpersonal problems, time and access to resources. When identifying own strengths and development needs, the candidate can carry out a self assessment. The candidate should understand the techniques of self assessment eg Strengths, Weaknesses, Opportunities and Threats – a SWOT analysis and how to carry a Training Needs Analysis.

7.2   For each method of assessment, the candidate should be able to draw up a list of when and how to use them, incorporating the disadvantages and advantages of each eg cost implications, interpersonal problems, time, access to resources. Setting targets/KPIs and then analysing the results can show how an individual is performing, while observation can be used to assess how the candidate reacts with others and handles customers. Self assessment can be used before appraisal for the individual to prepare for the meeting.

7.3   A personal development plan is a tool to list:

- the agreed areas for development
- the activities to be undertaken to achieve this development
- who may assist with this development
- when it should be achieved or reviewed
- the evidence that will show achievement of the learning in the plan.

Any development plan should follow SMART criteria ie be Specific, Measurable, Achievable, Realistic and Time bound.

The candidate should be able to identify a range of training and development opportunities:

- Coaching.
- Mentoring.
- Work-shadowing.
- Training courses.
- In-house training.
- Performance appraisals.
- E-learning.

The candidate should show an appreciation of individual learning styles which may impact upon which is the most appropriate learning method. For each learning method, the candidate should be able to list the benefits to both the individual and the organisation.

7.4   Personal feedback should focus on the positive and any negative feedback showed be viewed constructively and possible personal improvement considered. Candidates should realise learning is an ongoing process and they cannot stand still. Feedback on own performance can be formal and informal. Examples of formal feedback are appraisals, job performance review; informal could be lunch meetings, team meetings, ad hoc.

Candidates should understand they can obtain information about their own performance and possible learning opportunities from the following:

- Feedback from others eg peers, superiors; 360 feedback.
- The available learning and development opportunities.
- Internal, eg training courses, job sharing, coaching, work-shadowing and external training.

7.5   Feedback may be:
- formal or informal
- positive or negative.

Informal feedback is appropriate when a supervisor wants to congratulate a staff member on good work or to encourage an improvement when they view work being carried out.

Formal feedback is recorded and takes place in private. Formal feedback may be:

- an appraisal
- a performance review
- a disciplinary.

A suitable time and place should be agreed. When carrying out performance review, it is preferable to begin with the positive, seeking agreement on how to address the negatives.

5   Assessment

5.1   Summary of assessment methods (Routes (-11, -12, -13)
These routes are for UK and international centres

For each of these qualifications, candidates will be required to complete one externally set and marked named on demand test . This will consist of short answer questions and scenario based practical tasks.

City & Guilds provides the following assessments:

Level/Unit No.	Title	Assessment Method	Where to obtain assessment materials
Level 1/111	Principles of Customer Services	Externally set and marked named on demand test	Order via the Walled Garden Product code 8992-111
Level 2/112	Principles of Customer Services	Externally set and marked named on demand test	Order via the Walled Garden Product code 8992-112
Level 3/113	Principles of Customer Services	Externally set and marked named on demand test	Order via the Walled Garden Product code 8992-113

Centres will be required to name their candidates at the point of ordering examinations, a minimum of 14 days prior to the exam date. No unnamed bookings will be accepted.

Time constraints

Examinations

Level 1: 1 hour (plus 5 minutes reading time)
Level 2: 1 hour and 30 minutes (plus 5 minutes reading time)
Level 3: 2 hours (plus 5 minutes reading time)

All examinations must be taken under examination conditions. Please refer to the City & Guilds Regulations for the conduct of examinations for further guidance.

Grading and marking

Assessments will be graded Pass or First Class Pass.
Assessments are externally marked and graded.

Candidates who fail the examination receive feedback on the main areas for further development, ie Performance Codes. These Performance Codes are listed below.

Performance codes

		Level 1	Level 2	Level 3
	Narrow fail	AA	AA	AA
	Insufficient work submitted	AB	AB	AB
	Misinterpretation of question(s)	FK	FK	FK
	Customer needs, satisfaction and expectation	FL	FL	FL
	Organisations policies, complaints and confidentiality	FM	FM	FM
	Methods of communication	FN	FN	FN
	Knowledge, ability and attributes	FO	FO	FO
	Sources of information and storage/retrieval		FP	FP
	Promotion of products and services			FR
	Personal development and team working			FS

5.2 Summary of assessment methods – Hairdressing routes (-21, -22)
These routes are for UK centre only

For this these Customer Service Hairdressing qualifications, candidates will be required to complete the following assessments:

For each of these qualifications, candidates will be required to complete one externally set and internally marked assessment. This will consist of short answer questions and scenario based practical tasks.
City & Guilds provides the following assessments:

Level/Unit No.	Title	Assessment Method	Where to obtain assessment materials
Level 1/021	Principles of Customer Services	Externally set, internally marked and externally verified assessment	Download the current assessment from the City & Guilds website using required password
Level 2/022	Principles of Customer Services	Externally set, internally marked and externally verified assessment	Download the current assessment from the City & Guilds website using required password

Time constraints

Examinations

Level 1: 1 hour (plus 5 minutes reading time)
Level 2: 1 hour and 30 minutes (plus 5 minutes reading time)

All examinations must be taken under examination conditions. Please refer to the City & Guilds Regulations for the conduct of examinations for further guidance.

Grading and marking

Assessments will be graded Pass or First Class Pass.
Assessments are internally marked and graded. Assessments will be externally verified prior to results submission.

Grades are then submitted to City & Guilds via the Walled Garden.

Passwords for the assessments can be accessed on the Walled Garden by all approved centres.

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 or Centre Guide Delivering International Qualifications Centre guide delivering International qualifications 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.

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

Useful contacts

Type	Contact	Query
UK learners	T: +44 (0)20 7294 2800 E: learnersupport@cityandguilds.com	• General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	• General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44(0)20 7294 2413 E: centresupport@cityandguilds.com	• Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	• Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, candidate results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	• Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	• Re-issue of password or username • Technical problems • Entries • Results • GOLA • Navigation • User/menu option problems
Employer	T: +44 (0) 121 503 8993 E: business_unit@cityandguilds.com	• Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44(0)20 7294 3387	• Logbooks • Centre documents • Forms • Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: **feedbackandcomplaints@cityandguilds.com**