City & Guilds Level 1 Award in Customer Service (8992-11/8992-21)
City & Guilds Level 2 Award in Customer Service (8992-12/8992-22)
City & Guilds Level 3 Award in Customer Service (8992-13)

Version 7.5 (November 2024)

Qualification Handbook

Qualification at a glance

Subject area	Administration
City & Guilds number	8992
Age group approved	All learners
Entry requirements	City & Guilds does not set entry requirements for these qualifications.
Assessment	Written examination
Grading	First class pass/pass/fail
Approvals	Full approval
Support materials	Examination support guide, sample assessment
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds qualification number	Regulatory reference number	GLH	TQT
City & Guilds Level 1 Award in Customer Service	8992-11	500/3682/8	30	60
City & Guilds Level 2 Award in Customer Service	8992-12	500/3681/6	60	80
City & Guilds Level 3 Award in Customer Service*	8992-13	500/3680/4	90	100
City & Guilds Level 1 Award in Customer Service (Hairdressing route)*	8992-21	500/3682/8	30	60
City & Guilds Level 2 Award in Customer Service (Hairdressing route)*	8992-22	500/3681/6	60	80

* This qualification has been withdrawn and is no longer available for new candidate registrations. However, candidates who have already enrolled on the qualification will be granted a period of time to complete the qualification and achieve certification.

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
7.4 September 2024	Handbook reviewed and updated to new template	Throughout
7.5 November 2024	Assessment Strategy and Where to obtain assessment materials sections updated	Section 4

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1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who are the qualifications for?	These qualifications are for candidates who work or want to work as in a range of job roles within the Customer Service sector. They provide valuable accreditation of skills and/or knowledge for candidates, without requiring or proving occupational competence.
What does the qualification cover?	Customer Service skills are important in every sector and industry and these qualifications will provide the generic customer service skills needed for entry to many sectors. These qualifications 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. 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.
What opportunities for progression are there?	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.
Who did we develop the qualifications with?	These qualifications have been developed in response to employers' needs for short, bite-sized courses within the Business Support Skills sector.

Structure

To achieve the City & Guilds Level 1 Award in Customer Service, learners must achieve:

City & Guilds unit number	Unit title	Credit value	GLH
Mandatory unit:			
Learners must achieve the mandatory unit.			
8992-111 **OR** 8992-021	Level 1 Principles of Customer Service	6	30

To achieve the City & Guilds Level 2 Award in Customer Service, learners must achieve:

City & Guilds unit number	Unit title	Credit value	GLH
Mandatory unit:			
Learners must achieve the mandatory unit.			
8992-112 **OR** 8992-022	Level 2 Principles of Customer Service	8	60

To achieve the City & Guilds Level 3 Award in Customer Service, learners must achieve:

City & Guilds unit number	Unit title	Credit value	GLH
Mandatory unit:			
Learners must achieve the mandatory unit.			
8992-113	Level 3 Principles of Customer Service	10	90

Total Qualification Time (TQT)

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT comprises of the following two elements:

1) the number of hours that an awarding organisation has assigned to a qualification for guided learning
2) an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Title and level	GLH	TQT
City & Guilds Level 1 Award in Customer Service (8992-11 **OR** 8992-21*)	30	60
City & Guilds Level 2 Award in Customer Service (8992-12 **OR** 8992-22*)	60	80
City & Guilds Level 3 Award in Customer Service (8992-13*)	90	100

* This qualification has been withdrawn and is no longer available for new candidate registrations. However, candidates who have already enrolled on the qualification will be granted a period of time to complete the qualification and achieve certification.

2 Centre requirements

Approval

Full approval

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the document **Centre Approval Process: Quality Assurance Standards** for further information.

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

Resource requirements

Centre staffing

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

- be occupationally competent or technically knowledgeable in the area(s) for which they are delivering training and/or have experience of providing training (this knowledge must be to the same level as the training being delivered)
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

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 quality assurance, and that it takes account of any national or legislative developments.

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. All external quality assurance processes reflect the minimum requirements for verified and moderated assessments, as detailed in the Centre Assessment Standards Scrutiny (CASS), section H2 of Ofqual's General Conditions. For more information on both CASS and City and Guilds Quality Assurance processes visit: the What is CASS? and Quality Assurance Standards documents on the City & Guilds website.

Standards and rigorous quality assurance are maintained by the use of:

- Internal quality assurance
- City & Guilds external quality assurance.

In order to carry out the quality assurance role, Internal Quality Assurers must

- have appropriate teaching and vocational knowledge and expertise
- have experience in quality management/internal quality assurance
- hold or be working towards an appropriate teaching/training/assessing qualification
- be familiar with the occupation and technical content covered within the qualification.

External quality assurance for the qualification will be provided by City & Guilds EQA process. EQAs are appointed by City & Guilds to approve centres, and to monitor the assessment and internal quality assurance carried out by centres. External quality assurance is carried out to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

The role of the EQA is to:

- provide advice and support to centre staff
- ensure the quality and consistency of assessments and marking/grading within and between centres by the use of systematic sampling
- provide feedback to centres and to City & Guilds.

Learner entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

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

Access arrangements and reasonable adjustments

City & Guilds has considered the design of these qualifications and their assessments in order to best support accessibility and inclusion for all learners. We understand however that individuals have diverse learning needs and may require reasonable adjustments to fully participate. Reasonable adjustments, such as additional time or alternative formats, may be provided to accommodate learners with disabilities and support fair access to assessment.

Access arrangements are adjustments that allow candidates with disabilities, special educational needs, and temporary injuries to access the assessment and demonstrate their skills and knowledge without changing the demands of the assessment. These arrangements must be made before assessment takes place.

Equality legislation requires City & Guilds to make reasonable adjustments where a disabled person would be at a substantial disadvantage in undertaking an assessment. It is the responsibility of the centre to ensure at the start of a programme of learning that candidates will be able to access the requirements of the qualification.

Please refer to the Joint Council for Qualifications (JCQ) access arrangements and reasonable adjustments and access arrangements - when and how applications need to be made to City & Guilds. For more information documents are available on the City & Guilds website.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs
- support and guidance they may need when working towards their qualification
- any units they have already completed or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification, their responsibilities as a learner and the responsibilities of the centre. This information can be recorded on a learning contract.

Inclusion and diversity

City & Guilds is committed to improving inclusion and diversity within the way we work and how we deliver our purpose which is to help people and organisations develop the skills they need for growth.

More information and guidance to support centres in supporting inclusion and diversity through the delivery of City & Guilds qualifications can be found here:

Inclusion and diversity | City & Guilds (cityandguilds.com)

Sustainability

City & Guilds are committed to net zero. Our ambition is to reduce our carbon emissions by at least 50% before 2030 and develop environmentally responsible operations to achieve net zero by 2040 or sooner if we can. City & Guilds is committed to supporting qualifications that support our customers to consider sustainability and their environmental footprint.

More information and guidance to support centres in developing sustainable practices through the delivery of City & Guilds qualifications can be found here:

Our Pathway to Net Zero | City & Guilds (cityandguilds.com)

Centres should consider their own carbon footprint when delivering this qualification and consider reasonable and practical ways of delivering this qualification with sustainability in mind. This could include:

- reviewing purchasing and procurement processes (such as buying in bulk to reduce the amount of travel time and energy, considering and investing in the use of components that can be reused, instead of the use of disposable or single use consumables)

- reusing components wherever possible
- waste procedures (ensuring that waste is minimised, recycling of components is in place wherever possible)
- minimising water use and considering options for reuse/salvage as part of plumbing activities wherever possible.

Support materials

The following resources are available for this qualification:

Description	How to access
Examination support guide	www.cityandguilds.com
Sample assessment	www.cityandguilds.com

4 Assessment

Assessment of the qualification

Candidates must:

- successfully complete the assessment for unit 111 (Level 1), unit 112 (Level 2) or unit 113 (Level 3) containing short answer questions and scenario-based tasks.

Assessment types			
Unit	**Title**	**Assessment method**	**Where to obtain assessment materials**
8992-111	Level 1 Principles of Customer Services	Short answer questions, Scenario based tasks	Booked via the Walled Garden
8992-112	Level 2 Principles of Customer Services	Short answer questions, Scenario based tasks	Booked via the Walled Garden
8992-113	Level 3 Principles of Customer Services	Short answer questions, Scenario based tasks	Booked via the Walled Garden

Hairdressing routes

Candidates must:

- successfully complete the assessment for unit 021 (Level 1) or unit 022 (Level 2) containing short answer questions and scenario-based tasks.

Assessment types			
Unit	**Title**	**Assessment method**	**Where to obtain assessment materials**
8992-021	Level 1 Principles of Customer Services	Short answer questions, Scenario based tasks	Booked via the Walled Garden
8992-022	Level 2Principles of Customer Services	Short answer questions, Scenario based tasks	Booked via the Walled Garden

Assessment strategy

The assessments for these qualifications are externally set and marked by City & Guilds.

Sample assessment materials and an examination support guide are available to download from the City & Guilds website. Passwords for the sample assessments and marking grids are available on the Walled Garden.

Time constraints

The following must be applied to the assessment of these qualifications:

Level 1 (unit 111/021): 1 hour (plus 5 minutes reading time)

Level 2 (unit 112/022): 1 hour and 30 minutes (plus 5 minutes reading time)

Level 3 (unit 113): 2 hours (plus 5 minutes reading time)

Grading and performance codes

Assessments will be graded Pass or First Class Pass.

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 Units

Structure of the units

These units each have the following:

- City & Guilds reference number
- title
- level
- credit value
- guided learning hours
- assessment type
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- unit aim
- learning outcomes which comprise a number of assessment criteria
- range statements.

Guidance for delivery of the units

This qualification comprises a number of **units**. A unit describes what is expected of a competent person in particular aspects of their job.

Each **unit** is divided into **learning outcomes** which describe in further detail the skills and knowledge that a candidate should possess.

Each **learning outcome** has a set of **assessment criteria** (performance and knowledge and understanding) which specify the desired criteria that must be satisfied before an individual can be said to have performed to the agreed standard.

Range statements define the breadth or scope of a learning outcome and its assessment criteria by setting out the various circumstances in which they are to be applied.

Unit 111/021 Level 1 Principles of Customer Service

Level:	1
Credit value:	6
GLH:	30
Assessment type:	Written Examination
Relationship to NOS:	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.
Unit aim:	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 outcome

The learner will:

LO1 Know how to deliver good customer service

Assessment criteria

The learner can:

AC1.1 Identify different **types of customers**.
AC1.2 Identify different **needs of customers**.
AC1.3 State what is meant by **customer satisfaction**.
AC1.4 State what is meant by **customer expectations**.

Range

Customer types

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.

Customer needs
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.

Customer satisfaction
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.

Customer expectations
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.

Learning outcome

The learner will:

LO2 Know different communication methods

Assessment criteria

The learner can:

AC2.1 State **effective methods of communication** to use when dealing with different customers.
AC2.2 State **how to use questions** when dealing with different customers.
AC2.3 Identify **positive and negative body language** and facial expression.
AC2.4 State how **customers' body language** impacts on customer service.
AC2.5 State how **own body language impacts** on customer service.

Range

Effective communication
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.

Text is being used increasingly but like written communication it must be clear and easily understood.

Using questions
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.

Positive and negative body language
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.)

Customer body language
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.

Impact of body language

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.

Learning outcome

The learner will:

LO3 Know how to provide good customer service in line with organisational procedures

Assessment criteria

The learner can:

AC3.1 State the importance of providing products and services which are '**fit for purpose'**.
AC3.2 State the importance of customer and organisation **confidentiality**.
AC3.3 State the **limits of own authority**.

Range

Fit for purpose
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.

Confidentiality
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.

Limits of authority
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.

Learning outcome

The learner will:

LO4 Know how to effectively deal with customer queries, problems and complaints

Assessment criteria

The learner can:

AC4.1 State how to **deal with customer queries**.
AC4.2 Identify **common customer problems and complaints**.
AC4.3 State how to **deal with problems and complaints**.

Range

Dealing with customer queries

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.

Common 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.

Dealing with problems and complaints

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 Level 2 Principles of Customer Service

Level:	2
Credit value:	8
GLH:	60
Assessment type:	Written Examination
Relationship to NOS:	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.
Unit aim:	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 outcome

The learner will:

LO1 Know how to deliver good customer service to different types of customers

Assessment criteria

The learner can:

AC1.1 Describe different **types of customers**.
AC1.2 Describe different types of **customer needs**.

Range

Customer types

The candidate should be able to describe how they should adapt their behaviour to deal with each type of customer. 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.

Customer needs
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.

Learning outcome

The learner will:

LO2 Know organisational customer service policies and procedures

Assessment criteria

The learner can:

AC2.1 Describe the **benefits to an organisation of having a customer service policy**.
AC2.2 Explain how an organisation's **customer service policy contributes to good customer service**.
AC2.3 State the types of **information and records** an organisation keeps about its customers.
AC2.4 Describe the **purpose of different organisational customer service policies and procedures**.

Range

Benefits of customer service policy
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.

Contribution of customer service policy to good customer service
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.

Customer information and records
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.

Purpose of customer service policies and procedures
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.

Learning outcome

The learner will:

LO3 Understand the benefits to an organisation of having a good reputation

Assessment criteria

The learner can:

AC3.1 Describe the **benefits of a good reputation** for an organisation.
AC3.2 Explain how an organisation can **build a good reputation**.
AC3.3 Explain what can **damage an organisation's reputation**.

Range

Benefits of a good reputation

- 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.

Building a good reputation

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.

Damaging a reputation

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.

Learning outcome

The learner will:

LO4 Understand the qualities and attributes required in the customer service role

Assessment criteria

The learner can:

AC4.1 Describe the **key qualities** required in the customer service role eg professionalism, communication skills and appropriate body language.
AC4.2 Describe the **key attributes** required in a customer service role.
AC4.3 Describe how to **present a professional and knowledgeable image** to customers.

Range

Key qualities and attributes

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.

Interpersonal skills – The interpersonal skills required in a customer service role 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.

Professional and knowledgeable image
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.

Learning outcome

The learner will:

LO5 Understand importance of responding effectively to customers' needs, expectations and complaints

Assessment criteria

The learner can:

AC5.1 Describe how to **identify and confirm a customer's expectations**.
AC5.2 Explain the importance of **responding promptly to a customer** seeking assistance.
AC5.3 State the importance of **keeping the customer informed** and reassured.
AC5.4 State the importance of **explaining to customers when their needs or expectations cannot be met**.
AC5.5 Explain the **importance of gathering feedback** to help meet customers' expectations.
AC5.6 Describe **methods of gathering customer feedback**.

Range

Identifying and confirming customer expectations

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.

Responding promptly to customer

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).

Keeping customer informed

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'.

When customer needs cannot be met
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.

Importance of gathering feedback
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.

Methods of gathering feedback
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.

Learning outcome

The learner will:

LO6 Understand the importance of different methods of communication used to deal with different types of customers

Assessment criteria

The learner can:

AC6.1 Select the most **appropriate way of communicating with a customer** to meet their needs.
AC6.2 Explain how **non-verbal communication** affects the behaviour of the customer.
AC6.3 Explain the importance of communicating with the **customer that their expectations have been fully understood**.

Range

Appropriate customer communication
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.

Text messaging to mobile (cell) telephones is being used increasingly but, like written communication, it must be clear and easily understood.

Non-verbal communication
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.

Candidates 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.

Understanding customer expectations
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 Level 3 Principles of Customer Service

Level:	3
Credit value:	10
GLH:	90
Assessment type:	Written Examination
Relationship to NOS:	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.
Unit aim:	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 outcome

The learner will:

LO1 Know the key features of a service offer and its effects on customer expectations

Assessment criteria

The learner can:

AC1.1 Describe the **key features of a service offer** and how this can be affected by financial and other resource limitations.
AC1.2 Explain how a service offer can be affected by **financial and resource limitation**
AC1.3 Describe what **effects the service offer** may have on the customer's expectations.
AC1.4 Explain how **customer expectations are formed**.

Range

Features of a service offer

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.

Financial and resource limitations

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.

Effect of service offer on customer expectation

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

Formation of customer expectations

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.

Learning outcome

The learner will:

LO2 Know how to deliver reliable customer service

Assessment criteria

The learner can:

AC2.1 Describe how **staff resource** implications can affect the delivery of reliable customer service.
AC2.2 Explain the need to have **reliable information** for customers and identify the sources of this information.
AC2.3 Explain the need to have effective systems for **recording, storing and retrieving feedback**.
AC2.4 Describe how to identify **useful customer feedback**.
AC2.5 Describe how to decide **which feedback should be used**.
AC2.6 Explain the need to maintain the security and **confidentiality of data**.
AC2.7 Describe the potential impact on the customer and organisations of not maintaining **confidentiality of data**.

Range

Staffing

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.

Reliable customer information
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.

Recording, storing and retrieving feedback
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.

Useful customer feedback
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.

Confidentiality of data
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.

Learning outcome

The learner will:

LO3 Understand how to deal with different customer behaviours to ensure customer satisfaction

Assessment criteria

The learner can:

AC3.1 Explain how the **behaviour of customers** can influence the level of customer satisfaction.
AC3.2 Explain the **social and cultural differences** which govern behaviour and affect customer behaviours.
AC3.3 Explain how to **adjust own behaviour** when dealing with customer dissatisfaction.
AC3.4 Describe how to **deal positively with different customer behaviours and personalities** when managing problems and complaints.

Range

Behaviour of customers
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.

Social and cultural differences

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.

Adjust own behaviour

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.

Dealing with customer behaviours and personalities

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.

Learning outcome

The learner will:

LO4 Understand how customer service can be developed and improved

Assessment criteria

The learner can:

AC4.1 Describe methods of **measuring current customer service standards**.
AC4.2 Describe methods of **analysing customer feedback** to improve customer service standards.
AC4.3 Describe how to **implement and evaluate improvements** to customer service standards.

Range

Measuring current customer service standards

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.

Analysing customer feedback

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.

Implement and evaluate improvements

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.

Learning outcome

The learner will:

LO5 Understand how the promotion of products and services can benefit the customer and the organisation

Assessment criteria

The learner can:

AC5.1 Explain how an organisation can **promote additional services or products** to customers.
AC5.2 Describe the main **factors that influence customers** to use an organisation's services or products.
AC5.3 Describe **methods of communicating information** about services or products to customers.
AC5.4 Explain how **Unique Selling Points** (USPs) are used to differentiate service offers from that of competitors or comparable organisations.
AC5.5 Explain how USPs are directly related to **why customers choose to do business with organisations** by using their products or services.

Range

Promoting additional services or products

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.

Factors that influence customers

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.

Communicating about services or products

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.

Unique Selling Points

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.

Why customers choose to do business with an organisation

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.

Learning outcome

The learner will:

LO6 Understand the benefits of team-working in delivering good customer service

Assessment criteria

The learner can:

AC6.1 Describe the importance of **effective teamwork** and service partnerships for the delivery of good customer service.
AC6.2 Explain how a **team contributes to organisational aims** and objectives.
AC6.3 Explain how **team dynamics impact upon performance** and the achievement of customer satisfaction.
AC6.4 Describe how good customer service can **provide added value and a competitive advantage** for an organisation.
AC6.5 Explain why **customers buy benefits and solutions** not products.

Range

Effective teamwork

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.

Contribution to organisational aims

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.

Impact of team dynamics

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.

Adding value and competitive advantage
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.

Customers buy benefits and solutions
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.

Learning outcome

The learner will:

LO7 Understand how to develop the customer service skills of self and others

Assessment criteria

The learner can:

AC7.1 Describe how to **identify personal strengths and development needs** of self and others.
AC7.2 Explain how and when **methods of assessing individual performance** can be used.
AC7.3 Explain how to **create a personal development plan** to improve the customer service skills of self and others.
AC7.4 Describe how to obtain and **respond positively to constructive personal feedback** from others.

AC7.5 Explain how to **give useful and constructive personal feedback** to others.

Range

Identify personal strengths and development needs

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.

Methods of assessing individual performance

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.

Personal development plans

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.

Responding positively to constructive personal feedback

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.

Giving constructive personal feedback

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.

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 **centre document library** on **www.cityandguilds.com** or click on the links below:

Centre Handbook: Quality Assurance Standards

This document is for all approved centres and provides guidance to support their delivery of our qualifications. It includes information on:

- centre quality assurance criteria and monitoring activities
- administration and assessment systems
- centre-facing support teams at City & Guilds/ILM
- centre quality assurance roles and responsibilities.

The Centre Handbook should be used to ensure compliance with the terms and conditions of the centre contract.

Centre Assessment: Quality Assurance Standards

This document sets out the minimum common quality assurance requirements for our regulated and non-regulated qualifications that feature centre-assessed components. Specific guidance will also be included in relevant qualification handbooks and/or assessment documentation.

It incorporates our expectations for centre internal quality assurance and the external quality assurance methods we use to ensure that assessment standards are met and upheld. It also details the range of sanctions that may be put in place when centres do not comply with our requirements or actions that will be taken to align centre marking/assessment to required standards. Additionally, it provides detailed guidance on the secure and valid administration of centre assessments.

Access arrangements: When and how applications need to be made to City & Guilds 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 document library** also contains useful information on such things as:

- conducting examinations
- registering learners
- appeals and malpractice.

Useful contacts

Please visit the **Contact us** section of the City & Guilds website.

City & Guilds

For almost 150 years, we have worked with people, organisations and economies to help them identify and develop the skills they need to thrive. We understand the life-changing link between skills development, social mobility, prosperity and success. Everything we do is focused on developing and delivering high-quality training, qualifications, assessments and credentials that lead to jobs and meet the changing needs of industry.

We partner with our customers to deliver work-based learning programmes that build competency to support better prospects for people, organisations and wider society. We create flexible learning pathways that support lifelong employability because we believe that people deserve the opportunity to (re)train and (re)learn again and again – gaining new skills at every stage of life, regardless of where they start.

The City & Guilds community of brands includes Gen2, ILM, Intertrain, Kineo and The Oxford Group.

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