

EDI Level 2 NVQ Certificate in Customer Service



Supporting learning
and performance

Specification

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Introduction

About EDI

EDI is one of the largest awarders of accredited vocational qualifications in the UK and has been involved in providing qualifications for employment for over 100 years. We work with over 1400 centres and we award over 140,000 vocational qualification certificates every year. Our vocational qualifications are developed in collaboration with industry and are used by students and employers as a benchmark for practical skills and quality. They include QCF Qualifications, National Vocational Qualifications (NVQs), Scottish Vocational Qualifications (SVQs), Vocationally Related Qualifications (VRQs), Technical Certificates, Apprenticeships and Skills for Life qualifications.

EDI qualifications are accredited on the Qualifications and Credit Framework and are eligible for government funding. EDI offers unrivalled centre support, through online administration, resources and customer care.

In addition, EDI provides a wide range of services for training providers, colleges, employers and schools including customised assessments, bespoke training programmes, innovative interactive online assessments mapped to the national curriculum, an electronic portfolio system, access to high volume printing and broadband facilities. For more details, please visit the EDI website: www.ediplc.com.

What is the QCF?

What is the QCF?

The Qualifications and Credit Framework (QCF) is a unitised qualification framework underpinned by a system of credit accumulation and transfer. Every unit on the framework will have a level and a credit value which is based on the notional learning hours for that specific unit (for further information see the section: What is credit?). The QCF is designed to allow learners to achieve credit for individual units or qualifications, providing learners with the opportunity to accumulate credit at their own pace and use it to claim for a qualification when they are ready.

Qualifications within the QCF

There are three sizes of qualifications in the QCF:

- **Awards** (1-12 credits)
- **Certificates** (13-36 credits)
- **Diplomas** (37 credits or more)

It is possible to have all three of these qualifications at each level, for example, Level 1 Award, Certificate or Diploma in Business Skills. This is because the classification of the qualification as an Award, Certificate or Diploma refers to the size of the qualification, not the level of difficulty.

Each qualification title will contain the **level** of qualification (eg Entry 2), the **size** (award/certificate/diploma) and details indicating the **content** of qualification. For example:

- **EDI level 2 Award in Business Skills**
- **EDI level 1 Certificate in IT Users (ITQ)**

What is credit?

Every unit and qualification on the QCF has been given a credit value, which denotes the number of credits that will be awarded to each candidate who successfully completes the unit or qualification.

- **1 credit represents 10 notional learning hours**

Notional learning hours represent the amount of time a learner is expected to take, on average, to complete the learning outcomes of the unit to the standard required within the assessment criteria. It is important to note that notional learning hours are **not** the same as guided learning hours (GLH). GLH represent the hours during which a tutor or trainer is present and contributing to the learning process. Notional learning hours represent the hours which are needed to successfully cover all the learning required to achieve the unit, either guided or independently.

Rules of combination

Every qualification on the QCF is structured through rules of combination. Rules of combination are important because they define the number of credits which need to be achieved and where these credits must come from in order for a learner to achieve the qualification. Rules of combination also state what the potential is for learners to transfer credits between qualifications and awarding bodies.

The rules of combination for the EDI Level 2 NVQ Certificate in Customer Service are included later in this pack.

Personal Learner Record and Unique Learner Number

Units and qualifications achieved will be logged online within the learner's Personal Learner Record (PLR). In order to enable their achievement to be recorded, each learner will be provided with a ten digit Unique Learner Number (ULN). Learners will have access to their PLR and will also be able to give access to training providers and/or employers to enable them to view their records as evidence of achievement.

If you would like further information regarding the QCF IT system, including the Unique Learner Number, Personal Learning Record and Learning Provider Register please contact the Learning Records Service, either through their website: www.learningrecordsservice.org.uk or email: lrsupport@learningrecordsservice.org.uk.

Claiming Competence

Each of the units achieved will appear on the learner's certificate. If the learner does not complete the requirements for a full qualification, they will be awarded a unit certificate for the units in which the learner has demonstrated competence.

In order to claim the unit(s) or the qualification, the learner will need to complete a claim to competence, which is split into two sections: the evidence matrix and learner statement and summative assessor statement. These are located at the rear of the Specification.

Evidence matrix

The evidence matrix is designed to help with evidence collection. It is a mapping activity to ensure that learners have covered the 'Assessment Criteria' contained in learning outcome, and is intended to help to keep the volume of evidence to a minimum. One matrix should be completed for each unit.

It is expected that a selection of various types of evidence will be used as appropriate; columns in the matrix enable learners or assessors to enter the evidence type, eg Report, Log, Written Statement, and also the assessment method, eg Obs (= Observation), as shown in the Assessment method key. By inserting portfolio reference numbers in the boxes provided, learners will enable the Assessor, Internal Verifier and Quality Advisor to quickly locate the evidence which they are submitting to demonstrate their competence.

Examples of types of evidence learners could provide to prove competence:

- Record of observation of performance in the workplace
- Professional discussion
- Reflective account
- Product evidence (eg implementation plans, correspondence, work records)
- Work-based projects
- Testimony from senior colleagues/clients
- Personal report of actions and circumstances
- Accreditation of Prior Learning/Achievement (APL/A)
- Special projects, assignments or simulations
- Records of questioning
- Other

An example of the Evidence Matrix follows:

Learner statement and assessor summative statement

Each time a learner completes a unit and has signed off the evidence matrix the assessor will be required to complete the details on the claim to competence form, ie the unit number and the date of the summative assessment. Both learner and assessor are required to enter their initials. If the internal verifier has sampled that unit, he or she will also be required to enter the date and his or her initials.

Once the learner has completed some or all of the units and decides that it is time to claim these, the learner will need to write a statement showing how he or she achieved the unit/s. This should show:

- how the learner completed the units/award and what she or he has learnt from the experience;
- how long the learner has been in his or her current role and working towards this qualification;
- the assessment methods used to show competence;
- how this has affected the way the learner approaches his or her job.

The assessor is also required to write a statement. This should provide support for the learner's statement and any supplementary information about how the learner achieved the unit/s drawing on the learner's particular circumstances.

An example of a completed claim to competence form with learner and assessor summative statements follows. This is for guidance only to give an indication of the kind of things that should be mentioned.

A claim should only be submitted when there is sufficient evidence to fulfil all of the above.

It is understood, however, that learners may not always have evidence to cover the full range of situations that are indicated. Nonetheless, the Claim to Competence cannot be agreed and signed by the assessor until the assessor is sure that the learner could operate across a range of different situations. As such, where visible evidence is not present, the assessor will need to interview the learner to cover these aspects. Overall, it is recommended that the portfolio is as complete as possible in order to fully demonstrate and support the Claim to Competence and in order to clarify this claim to the assessor as effectively as possible.

A completed CTC form (completed by both learner and assessor) and blank CTC form to follow.

Learner Statement and Assessor Summative Statement

Candidate name: <input style="width: 90%;" type="text"/>						Registration number: <input style="width: 90%;" type="text"/>					
Qualification title: <input style="width: 90%;" type="text"/>						Number of units completed for this claim (write in words) <input style="width: 90%;" type="text"/>					
						Full Award: Yes/No <input style="width: 90%;" type="text"/>					
Unit no	Summative assessment date	Learner initials	Assessor initials	Internal Verifier date	IV initials	Unit No	Summative assessment date	Learner initials	Assessor initials	Internal Verifier date	IV initials

LEARNER STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED

Completing these 3 units has been very enjoyable and I have realised whilst doing them that I have learnt a great deal about the way I work and also about my employment rights and responsibilities. I have gathered evidence from my job role within The Office, my workplace and have used specific work situations that clearly show how I am able to interact and work within my team and also how I take responsibility for ensuring that I work within the requirements of my organisation. I am always keen to keep up to date with new changes within work and also I like to learn new tasks and take on new challenges.

Within my evidence, I have shown that I am sensitive and able to work with a diverse work force and also that I take note of colleagues' needs and beliefs. I am fully aware of my employment rights and responsibilities and have even guided colleagues to websites I used for research for their own learning.

I am an H&S rep in the office and so completing this unit was not a problem for me. I used copies of risk assessments that I had carried out and also my assessor carried out a discussion with me around this unit.

Across all of the units, my assessor has observed me and has questioned me to back up the observations.

I realise now just how much I do at work and how completing these 3 units have made me strive to achieve even higher standards within my work.

I confirm the evidence I have submitted to claim competence is authentic.

Learner signature: _____ Date: _____

ASSESSOR SUMMATIVE STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED

A.N. Candidate has used a wide selection of work situations to show exactly how he works within his business environment, carried out his responsibilities at work and also how he ensures his own actions reduces risks to health and safety.

A.N. has carried out research prior to being assessed in terms of employment rights and responsibilities, which was an area where he highlighted more knowledge was needed. This has helped him in his work as he is now more aware of what he is legally able to do and he is now acting as a mentor to other colleagues in this area.

A.N. is the office H&S rep, so collecting evidence for this unit was not a problem and the evidence clearly demonstrates A.N.'s competence at ensuring all of his colleagues and his safety.

Throughout the period of assessment within the units completed, A.N. has shown his knowledge and competence and this is shown within assessor observation, discussions and witness testimony that accompanies his work product evidence and personal statements.

I am satisfied that evidence used clearly demonstrates the requirements for these 3 units fully, well done A.N.

I confirm the evidence I have assessed is authentic.

Assessor signature: _____ Date: _____

Internal Verifier signature: _____ Date: _____

Learner Statement and Assessor Summative Statement

Candidate name:

Registration number:

Qualification title:

Number of units completed for this claim
(write in words)

Full award: Yes/No

Unit no	Summative assessment date	Learner initials	Assessor initials	Internal Verifier date	IV initials

Unit no	Summative assessment date	Learner initials	Assessor initials	Internal Verifier date	IV initials

LEARNER STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED

I confirm the evidence I have submitted to claim competence is authentic

Learner signature: _____

Date: _____

ASSESSOR SUMMATIVE STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED

I confirm the evidence I have assessed is authentic

Assessor signature: _____

Date: _____

Internal Verifier signature: _____

Date: _____

Appeals Procedure for Learners

This procedure applies to all competency based qualifications and units of qualifications. If a learner is dissatisfied with an exam/test result, they will need to follow the Exams Procedure.

If learners are dissatisfied with an assessment outcome, they have the right to appeal. The main reasons for an appeal are likely to be:

- learners do not understand why they are not yet regarded as competent, because of unsatisfactory feedback from the Assessor
- learners believe they are competent and that the Assessor has misjudged them, or has failed to utilise some vital evidence.

EDI expects most appeals from learners to be resolved within the centre. EDI will only consider a learner's appeal after the centre's internal appeals procedure has been fully exhausted.

Stage 1 – appeal to the centre

If learners have received a decision as to their competence with which they are dissatisfied, they have the right to appeal directly to the Assessor who carried out the assessment. This appeal must be in writing and clearly indicate:

- the points of disagreement
- the evidence in the portfolio that the learner believes meets the requirements of the Performance Criteria and/or knowledge for claiming competence.

The Assessor must give a clear judgement, in writing, to the learner within 10 working days stating justification for the decision.

If learners are not satisfied with the outcome they can next appeal to the Centre's Internal Quality Verifier. This appeal must be in writing, but need not repeat the detail provided to the assessor. The original written appeal to the Assessor, and the Assessor's judgement, must be made available to the Internal Verifier/Assurer. Centres are entitled to have further internal phases to Stage 1, but must communicate this to all learners.

The Internal Quality Verifier/Assurer must give a clear judgement, in writing to the learner within 10 working days stating justification for the decision.

Stage 2 – Appeal to the awarding body

A fee will be charged for an external review (please see current fee sheet). This fee will be refunded if the appeal is upheld.

Learners who are not satisfied with the outcomes of the Internal Quality Verifier/Assurer's decision and who have exhausted the Centre's internal appeals procedure may proceed by appealing to EDI. This appeal must be in writing to the Quality Assurance Manager (email qualityassurance@ediplc.com), be accompanied by copies of all documentation from Stage 1 and submitted within three weeks of the receipt of the outcome from the Internal Quality Verifier/Assurer. Learners must also advise their centres that they have made a formal appeal to EDI.

EDI will acknowledge receipt of the appeal within three working days. The Quality Assurance Manager will work with an appropriate member of staff who has had no prior involvement with the centre to investigate that all the necessary stages have been correctly completed and documented.

Internal review

A review of the grounds for appeal will be undertaken by the Quality Assurance Manager, together with a sector specific Quality Advisor. The purpose of the review will be to consider whether the centre's original judgement was sound and may include the following:

- a discussion with the centre and/or learner and EDI personnel
- a request for further information from the centre, learner or EDI personnel
- a centre visit by authorised EDI personnel
- any other action that EDI deems appropriate to resolve the case.

The outcome of the appeal, including the results of any further reviews of the evidence, will be communicated to the learner and centre within 10 working days of the conclusion of any further work authorised.

External review

If learners remain dissatisfied following the internal review, they may apply to the Appeals Panel.

The Appeals Panel will comprise three independent members, the Innovation Manager and a member of the Quality Assurance Department. One of the independent members shall be appointed chair of the Panel.

The Appeals Panel will review the case and determine whether the action that EDI has taken to resolve the case has been both sufficient and appropriate.

The panel will either:

- (a) agree that the action that EDI has taken has been both sufficient and appropriate and therefore reject the appeal; or
- (b) uphold the appeal and authorise further action to be carried out. The further action may include:
 - the appointment of an independent Assessor
 - any other action that the Appeals Panel deems appropriate to resolve the case.

The outcome of the appeal, including the results of any further action, will be communicated to the learner and centre within 10 working days of the conclusion of any further work authorised.

Note: The decision of the Appeals Panel is final.

Note: Every centre should have its own appeals policy and procedure

Appeal to regulatory body

Following appeal to the awarding body, if learners are unsatisfied with the result, then they are entitled to appeal to the relevant regulatory body.

- NVQ/QCF regulatory body – Ofqual (Office of Qualifications and Examinations Regulation)
- SVQ regulatory body – SQA (Scottish Qualifications Authority)

EDI Level 2 NVQ Certificate in Customer Service

Qualification structure

To achieve a full Level 2 NVQ Certificate in Customer Service, learners must achieve a minimum of twenty eight credits. The learner must achieve eight credits from the Mandatory Units and a further twenty credits must be achieved by completing a minimum of one unit from each Optional Group. A minimum of eleven credits must be achieved at level 2 from optional groups B to E.

GROUP A	UNIT CODE	Mandatory Units - Customer Service Foundations	QCF LEVEL	QCF CREDIT
F1	CU791	Communicate using customer service language	1	4
F2	CU792	Follow the rules to deliver customer service	2	4

Group B	UNIT CODE	Optional Units - Impression and Image	QCF Level	QCF Credit
A1	CU793	Maintain a positive and customer-friendly attitude	1	5
A2	CU794	Adapt your behaviour to give a good customer service impression	1	5
A3	CU795	Communicate effectively with customers	2	5
A4	CU796	Give customers a positive impression of yourself and your organisation	2	5
A5	CU797	Promote additional services or products to customers	2	6
A6	CU798	Process information about customers	2	5
A7	CU799	Live up to the customer service promise	2	6
A8	CU800	Make customer service personal	2	6
A9	CU801	Go the extra mile in customer service	2	6
A10	CU802	Deal with customers face to face	2	5
A11	CU803	Deal with incoming telephone calls from customers	2	5
A12	CU804	Make telephone calls to customers	2	6
A13	CU818	Deal with customers in writing or electronically	3	6
A14	CU755	Use customer service as a competitive tool	3	8
A15	CU819	Organise the promotion of additional services or products to customers	3	7
A16	CU820	Build a customer service knowledge set	3	7

Group C	UNIT CODE	Optional Units - Delivery	QCF Level	QCF Credit
B1	CU805	Do your job in a customer friendly way	1	5
B2	CU806	Deliver reliable customer service	2	5
B3	CU807	Deliver customer service on your customer's premises	2	5
B4	CU808	Recognise diversity when delivering customer service	2	5
B5	CU809	Deal with customers across a language divide	2	8

Group C	UNIT CODE	Optional Units - Delivery	QCF Level	QCF Credit
B6	CU810	Use questioning techniques when delivering customer service	2	4
B7	CU811	Deal with customers using bespoke software	2	5
B8	CU812	Maintain customer service through effective hand over	2	4
B9	CU821	Deliver customer service using service partnerships	3	6
B10	CU822	Organise the delivery of reliable customer service	3	6
B11	CU823	Improve the customer relationship	3	7

Group D	UNIT CODE	Optional Units - Handling Problems	QCF Level	QCF Credit
C1	CU813	Recognise and deal with customer queries, requests and problems	1	5
C2	CU814	Take details of customer service problems	1	4
C3	CU815	Resolve customer service problems	2	6
C4	CU816	Deliver customer service to difficult customers	2	6
C5	CU756	Monitor and solve customer service problems	3	6
C6	CU817	Apply risk assessment to customer service	3	10
C7	CU824	Process customer service complaints	3	6

Group E	UNIT CODE	Optional Units – Development and Improvement	QCF Level	QCF Credit
D1	CU825	Develop customer relationships	2	6
D2	CU826	Support customer service improvements	2	5
D3	CU827	Develop personal performance through delivering customer service	2	6
D4	CU828	Support customers using on-line customer services	2	5
D5	CU829	Buddy a colleague to develop their customer service skills	2	5
D6	CU830	Develop your own customer service skills through self-study	2	6
D7	CU831	Support customers using self-service technology	2	5
D8	CU832	Work with others to improve customer service	3	8
D9	CU833	Promote continuous improvement	3	7
D10	CU834	Develop your own and others' customer service skills	3	8
D11	CU835	Lead a team to improve customer service	3	7
D12	CU836	Gather, analyse and interpret customer feedback	3	10
D13	CU837	Monitor the quality of customer service transactions	3	7

Guided learning hours

We recommend that 192-228 guided learning hours (GLHs) provide a suitable course length for an 'average' learner at this level.

Guided learning hours include direct contact hours, as well as other time when candidates are completing work that has been agreed with teachers or training providers. It is the responsibility of training centres to decide the appropriate course duration, based on their candidates' ability and level of existing knowledge. It is possible, therefore, that the number of GLHs can vary significantly from one training centre to another according to candidates' needs.

Learners with particular requirements

We recognise that some learners will have particular requirements. EDI's policy for candidates with particular requirements is stated in the *EDI Guide for Centres*, which is available via www.ediplc.com or by contacting Customer Services.

Further information

Information about EDI qualifications, assessments or other issues can be found on the EDI website www.ediplc.com or by telephoning the EDI Enquiries team on 08707 202 909.

Unit CU791 Communicate Using Customer Service Language

Aims

This unit is about the language and basic principles that are the heart of customer service and the skills needed to communicate effectively with customers and colleagues. It also covers how the learner fits into the customer service picture in their organisation and the contribution of their job to good customer service. The individual needs to be able to describe and explain the services or products that their organisation offers and how it delivers customer service.

Credit value 4

Level 1

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Identify customers and their characteristics and expectations	1.1 Recognise typical customers and their expectations 1.2 Discuss customer expectations with colleagues using recognised customer service language 1.3 Follow procedures through which they and their colleagues deliver effective customer service
2 Identify their organisation's services and products	2.1 Outline their organisation's services and products to customers 2.2 Greet customers politely and positively 2.2 List the information they need to deliver effective customer service and where that information can be found

<p>3 Know how to communicate using customer service language</p>	<p>3.1 Identify the differences between an internal customer and an external customer</p> <p>3.2 List their organisation's services or products</p> <p>3.3 Describe the connection between customer expectations and customer satisfaction in customer service</p> <p>3.4 Describe why organisation procedures are important to good customer service</p> <p>3.5 Explain why teamwork is central to good customer service</p> <p>3.6 Identify the service offer of their organisation</p> <p>3.7 Identify the part they play in delivering customer service</p> <p>3.8 Identify who are their customers</p> <p>3.9 Describe the main characteristics of typical customers that they deal with</p> <p>3.10 Identify what impresses their customers and what annoys their customers</p> <p>3.11 Identify who's who and who does what to deliver customer service in their organisation</p> <p>3.12 Describe the kinds of information they need to give good customer service to customers</p> <p>3.13 Explain how to find information about their organisation's services or products</p> <p>3.14 List typical customer service problems in their work and who should be told about them</p> <p>3.15 Explain how the way they behave affects their customer's service experience</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

Unit CU792 Follow the Rules to Deliver Customer Service

Aims

This unit requires the learner to understand and follow all the rules that apply to customer service delivered by their organisation and how they apply to the learner and their job

Credit value 4

Level 2

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Follow their organisation's customer service practices and procedures	1.1 Follow organisational practices and procedures that relate to their customer service work 1.2 Recognise the limits of what they are allowed to do when delivering customer service 1.3 Refer to somebody in authority when they need to 1.4 Work in a way that protects the security of customers and their property 1.5 Work in a way that protects the security of information about customers
2 Know how to follow the rules to deliver customer service	2.1 Describe organisational practices and procedures that relate to their customer service work 2.2 Identify the limits of what they are allowed to do when delivering customer service 2.3 Explain when and how they should refer to somebody in authority about the rules for delivering customer service 2.4 Explain how they protect the security of customers and their property 2.5 Explain how they protect the security of information about customers 2.6 Describe their health and safety responsibilities as they relate to their customer service work

	<p>2.7 Explain their responsibilities to deliver customer service treating customers equally</p> <p>2.8 Explain why it is important to respect customer and organisation confidentiality</p> <p>2.9 List the main things they must do and not do in their job under legislation that affects their customer service work</p> <p>2.10 List the main things that they must do and not do in their job under external regulations that affect their customer service work</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
5. You must provide evidence of following the rules to deliver customer service:
 - a. during routine delivery of customer service
 - b. during a busy time in your job
 - c. during a quiet time in your job
 - d. when people, systems or resources have let you down

Unit CU793 Maintain a Positive and Customer-Friendly Attitude

Aims

This Unit the learner’s attitude and the way the learner behaves towards customers affects customer satisfaction. Simply following procedures may not be enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. Customers like to think that staff want to help and they can show this by being friendly and positive and giving customers complete personal attention.

Credit value 5

Level 1

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Show the right attitude for customer service	1.1 Speak to customers clearly and put them at their ease 1.2 Recognise how customers are feeling and establish a rapport with them 1.3 Show customers that you are willing and enthusiastic at all times 1.4 Recognise that each customer is different and treat them as an individual 1.5 Show customers respect at all times and under any circumstances 1.6 Show customers that you can be relied on 1.7 Show colleagues respect at all times and under any circumstances 1.8 Show colleagues that you can be relied on

<p>2 Show appropriate and positive behaviours to customers</p>	<p>2.1 Recognise and respond when a customer wants or needs attention</p> <p>2.2 Greet customers politely and positively</p> <p>2.3 Focus on customers and ignore distractions which are not important to them</p> <p>2.4 React appropriately to situations that are important enough to interrupt their work with a customer</p> <p>2.5 Thank customers for the information they have given or for doing business with your organisation</p> <p>2.6 Help colleagues to provide good customer service</p>
<p>3 Know how to maintain a positive and customer-friendly attitude</p>	<p>3.1 Identify signs that a customer gives when seeking attention</p> <p>3.2 Describe what rapport looks, sounds and feels like</p> <p>3.3 Identify what unimportant distractions are</p> <p>3.4 Identify what is important enough to interrupt their work with a customer</p> <p>3.5 Identify positive and negative body language and facial expressions</p> <p>3.6 State how people are different and have different expectations for many reasons such as their age, culture and personality</p>

Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you are positive and customer-friendly with customers who are:
 - a easy to deal with
 - b difficult to deal with.
6. You need to include evidence that you are positive and customer-friendly:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job.

Unit CU794 Adapt Your Behaviour to Give a Good Customer Service Impression

Aims

This unit is all about how the learner's behaviour affects the way customers see them. Some customers expect different things from the service they offer but there are basic acceptable standards of behaviour and attitudes that they need to achieve. Their managers and supervisors also expect them to meet those standards. When they create the right impression and show a positive attitude they reduce the risk of somebody being upset or offended by the way they deal with them. This unit is appropriate for learners who have done jobs where they had limited contact with customers, are experiencing customer service work for the first time or are just starting their first job. If a learner has already successfully done full or part-time work dealing directly with customers, this may not be the right unit for them and they should consider the unit - "Maintain a positive and customer-friendly attitude".

Credit value 5

Level 1

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Look and act the part in order to provide a good customer service impression	1.1 Dress for customer service work in the way their organisation expects 1.2 Show they are working hard and making efforts to impress customers 1.3 Be in the right place at the right time to give a good impression and deliver good customer service 1.4 Show good manners when dealing with customers
2 Relate to their customers and to colleagues effectively	2.1 Explain the benefits of dealing with customers face to face or by telephone rather than using text, e-mail or writing 2.2 Talk clearly to customers using words that they can understand 2.3 Talk to customers without using language that they would consider to be bad 2.4 Show a willing and friendly attitude when dealing with customers without being over-familiar 2.5 Help and cooperate with colleagues to give good service to customers

<p>3 Know how to adapt their behaviour to give a good customer service impression</p>	<p>3.1 Identify how the way they dress affects the way that customers react to the service they provide</p> <p>3.2 Describe why customers may see particular types of dress as inappropriate and how their organisation expects them to dress</p> <p>3.3 State why it is important for customers to feel that they are working hard to give them an excellent service</p> <p>3.4 State why good timekeeping and making sure they are where they are expected to be is important to giving excellent customer service</p> <p>3.5 Describe what behaviour is considered by most customers to be “good manners” and what is considered to be “bad manners” or rudeness</p> <p>3.6 Identify what customers and colleagues might consider to be bad language and why it may offend people</p> <p>3.7 Identify why customers feel better about the service they receive if they have a willing and friendly attitude</p> <p>3.8 Describe how to behave so that they appear to be willing and friendly with customers without being over-familiar</p> <p>3.9 Identify what they can do to cooperate with colleagues in giving customer service and why that might be helpful</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you are positive and customer-friendly with customers who are:
 - a easy to deal with
 - b difficult to deal with.
6. You need to include evidence that you are positive and customer-friendly:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job.

Unit CU795 Communicate Effectively with Customers

Aims

To provide good customer service the learner needs to understand what customers want and how they feel. This means that they need to share information with them and listen carefully to them. Customers need to understand what the learner is telling them and what they are able to do for them. Communication is an essential skill for delivering good customer service.

Credit value 5

Level 2

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1 Communicate effectively with customers</p>	<p>1.1 Listen actively to what customers are saying</p> <p>1.2 Identify the most important things that customers are telling them</p> <p>1.3 Respond appropriately to what customers are telling them</p> <p>1.4 Check that they understand what customers are telling them and make sure it is really what they mean</p> <p>1.5 Summarise information for customers</p> <p>1.6 Explain in a way that is clear and does not cause offence when they cannot help a customer</p> <p>1.7 Use appropriate body language when communicating with customers</p> <p>1.8 Read customers' body language to help them understand their feelings and wishes</p> <p>1.9 Deal with customers in a respectful, helpful and professional way at all times</p> <p>1.10 Help to give good customer service by passing messages to colleagues</p>

<p>2 Understand how to communicate effectively with customers</p>	<p>2.1 Identify the difference between hearing and listening</p> <p>2.2 Explain how to listen actively</p> <p>2.3. Describe how to read both positive and negative body language</p> <p>2.4 Explain how to use body language effectively</p> <p>2.5 State how to use questions to check that they understand what customers are telling them</p> <p>2.6 Identify the difference between negative and positive language</p> <p>2.7 Explain how to summarise</p> <p>2.8 Explain why it is important to speak clearly</p> <p>2.9 Explain why it is important to use words that the customer will understand</p> <p>2.10 Describe how to communicate with customers who have language, dialect or accents that are different from theirs</p> <p>2.11 Explain why the way things are said, and the tone of voice, affects the way a customer experiences customer service</p> <p>2.12 Identify what information is helpful to pass on in messages to colleagues so that customers receive good service</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Level 1 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you have communicated effectively with customers:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job.
6. You need to include evidence that you have communicated effectively with different customers who:
 - a have an easy-going attitude
 - b have a difficult attitude
 - c are easy to understand
 - d are difficult to understand.
7. The messages you pass on to colleagues may be verbal, in writing or passed on by any other method you would be expected to use within your job.

Unit CU796 Give Customers a Positive Impression of Yourself and Your Organisation

Aims

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This Unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learners' behaviour counts when dealing with a customer.

Credit value 5

Level 2

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Establish rapport with customers	1.1 Meet their organisation's standards of appearance and behaviour 1.2 Greet their customer respectfully and in a friendly manner 1.3 Communicate with their customer in a way that makes them feel valued and respected 1.4 Identify and confirm their customer's expectations 1.5 Treat their customer courteously and helpfully at all times 1.6 Keep their customer informed and reassured 1.7 Adapt their behaviour to respond to different customer behaviour

<p>2 Respond appropriately to customers</p>	<p>2.1 Respond promptly to a customer seeking help</p> <p>2.2 Choose the most appropriate way to communicate with their customer</p> <p>2.3 Check with their customer that they have fully understood their expectations</p> <p>2.4 Respond promptly and positively to their customer's questions and comments</p> <p>2.5 Allow their customer time to consider their response and give further explanation when appropriate</p>
<p>3 Communicate information to customers</p>	<p>3.1 Quickly find information that will help their customer</p> <p>3.2 Give their customer information they need about the services or products offered by their organisation</p> <p>3.3 Recognise information that their customer might find complicated and check whether they fully understand</p> <p>3.4 Explain clearly to their customers any reasons why their expectations cannot be met</p>
<p>4 Understand how to give customers a positive impression of themselves and the organisation they must know and understand</p>	<p>4.1 Describe their organisation's standards for appearance and behaviour</p> <p>4.2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately</p> <p>4.3 Identify their organisation's rules and procedures regarding the methods of communication they use</p> <p>4.4 Explain how to recognise when a customer is angry or confused</p> <p>4.5 Identify their organisation's standards for timeliness in responding to customer questions and requests for information</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of creating a positive impression with customers:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
6. You must provide evidence that you communicate with customers effectively by:
 - a using appropriate spoken or written language
 - b applying the conventions and rules appropriate to the method of communication you have chosen

Unit CU797 Promote Additional Services or Products to Customers

Aims

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products the organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products. This unit is about the learners' need to keep pace with new developments and to encourage customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from the organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available. Learners should not choose this unit if their organisation does not want them to suggest additional services or products to customers.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Identify additional services or products that are available	1.1 Update and develop their knowledge of their organisation's services or products 1.2 Check with others when they are unsure about new service or product details 1.3 Identify appropriate services or products that may interest their customer 1.4 Spot opportunities for offering their customer additional services or products that will improve the customer experience

<p>2. Inform customers about additional services or products</p>	<p>2.1 Choose the best time to inform their customer about additional services or products</p> <p>2.2 Choose the best method of communication to introduce their customer to additional services or products</p> <p>2.3 Give their customer accurate and sufficient information to enable them to make a decision about the additional services or products</p> <p>2.4 Give their customer time to ask questions about the additional services or products</p>
<p>3. Gain customer commitment to using additional services or products</p>	<p>3.1 Close the conversation if the customer shows no interest</p> <p>3.2 Give information to move the situation forward when their customer shows interest</p> <p>3.3 Secure customer agreement and check customer understanding of the delivery of the service or product</p> <p>3.4 Take action to ensure prompt delivery of the additional services or products to their customer</p> <p>3.5 Refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility</p>

<p>4. Understand how to promote additional services or products to customers</p>	<p>4.1 Describe the organisation's procedures and systems for encouraging the use of additional services or products</p> <p>4.2 Explain how additional services or products will benefit their customers</p> <p>4.3 Explain how their customer's use of additional services or products will benefit their organisation</p> <p>4.4 Identify the main factors that influence customers to use their services or products</p> <p>4.5 Explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p> <p>4.6 State how to give appropriate, balanced information to customers about services or products</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence that the additional services or products offered include:
 - a use of services or products that are new to your customer
 - b additional use of services or products that your customer has used before.
6. Your evidence must show that you:
 - a identify what your customer wants by seeking information directly
 - b identify what your customer wants from spontaneous customer comments.

Unit CU798 Process Information About Customers

Aims

The learner and their organisation need information about their customers and their behaviour to answer customer questions and to respond to customer requests. Information about customers is also used by the organisation to develop its customer service. Some customer information is collected from customers. Other customer information is collected through information systems and equipment that make records of service delivery. In either case the learner must collect information, retrieve it and supply it when needed. Good customer information provides a sound basis for all customer service transactions. The quality of the customer information depends heavily on the skills and attention to detail of the person dealing with the information.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Collect information about customers	1.1 Collect and record new information about customers following the organisation's guidelines 1.2 Update existing information about customers 1.3 Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines
2. Select and retrieve information about customers	2.1 Respond promptly to authorised requests for information about customers 2.2 Select and retrieve relevant information for customers or colleagues following the organisation's guidelines
3. Supply information about customers	3.1 Supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations 3.2 Choose the most appropriate way to supply information to their customers or colleagues 3.3 Confirm that their customers or colleagues have received and understood the customer information

<p>4. Understand how to process customer service information</p>	<p>4.1 Describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers</p> <p>4.2 Identify types of personal information about customers that should and should not be kept on record</p> <p>4.3 Explain how to collect information about customers efficiently and effectively</p> <p>4.4 Explain how to operate the customer information storage system</p> <p>4.5 Explain why processing information about customers correctly makes an important contribution to effective customer service</p> <p>4.6 Explain the importance of attention to detail when processing information about customers</p> <p>4.7 Describe legal and regulatory restrictions on the storage and use of customer data</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence that you have processed information relating to:
 - a new customers
 - b existing customers.
6. Your evidence must show that you have:
 - a checked whether the information you are collecting and retrieving is accurate and up-to-date
 - b selected information that is directly relevant to each of your customers

Unit CU799 Live up to the Customer Service Promise

Aims

The learner may work in an organisation that has a carefully defined brand and vision that includes a specific service offer and promise to their customers. Often, much work has taken place to develop these, and they influence what the customer expects. By promoting the brand, the organisation is making a promise to their customers about what they can expect. Customer satisfaction is unlikely to be achieved if their customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have firm expectations. This unit is about the way the learner's work supports the branding of their services or products. It covers what they must do to make sure that they deliver the promise that the customer has come to expect. It also covers how the learner can avoid giving their customer an experience that is significantly different from the one offered in the promise.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand and explain the customer service promise	1.1 Explain the key features of the service offer, vision and promise their organisation has made 1.2 Identify the role they can play to ensure that their customer believes that the service offer, vision and promise is being delivered 1.3 Explain the procedures and regulations their organisation follows to support the service offer, vision and promise 1.4 Devise and use phrases that reinforce the service offer, vision and promise 1.5 Identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise 1.6 Identify moments and actions within the delivery of customer service that are particularly relevant to their customer's experience of the promise being delivered 1.7 Share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise

<p>2. Produce customer satisfaction by delivering the customer service promise</p>	<p>2.1 Ensure that their appearance and behaviour supports the organisation's service offer, vision and promise</p> <p>2.2 Observe or listen to the customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise</p> <p>2.3 Take actions to deliver customer service in a way that meets their customer's expectations and understanding of the service offer, vision and promise</p> <p>2.4 Ensure that what they decide to do is realistic and in line with the service offer and promise</p> <p>2.5 Be positive about and supportive of the service offer and promise</p>
<p>3. Know how to live up to the customer service promise</p>	<p>3.1 Identify the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's service offer, vision and promise</p> <p>3.2 Identify ways in which staff can contribute to communicating the service vision or promise to customers</p> <p>3.3 Explain sales, marketing and/or public relations reasons for defining a service offer, vision and promise</p> <p>3.4 Explain how words can be used and adapted to reflect a defined service offer, vision and promise</p> <p>3.5 Explain how actions can be used and adapted to reflect a defined service offer, vision and promise</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your organisation's service offer, vision and promise may be expressed formally or may be simply an informal description of the way customer service is delivered.
5. Your evidence of your organisation's service offer, vision and promise must include examples of:
 - a the way these are communicated to customers
 - b how your job role links with your organisation's offers.
6. You must show how you deliver the customer service promise:
 - a through your own efforts
 - b working with others.
7. Your evidence must show that you have taken opportunities to reinforce your organisation's message:
 - a through organisation initiatives
 - b by responding to opportunities when dealing with customers

Unit CU800 Make Customer Service Personal

Aims

Research has shown that customer satisfaction increases if customers feel that they have been treated in a way that recognises their own personal needs. When they are delivering customer service learners often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything the learner can do to make each customer feel that they have had their complete attention and have been dealt with personally increases their sense of satisfaction. This unit is about how the learner can help their customers feel that they have experienced service that focuses on them as an individual. When the learner works with a customer they need to give the impression that it is on a 'one to one' basis, that they care what happens to their customer and that they respect their customer as an individual.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Identify opportunities for making customer service personal	1.1 Identify which of their organisation's systems or procedures allows them to add a personal touch to the service 1.2 Observe and listen to their customer carefully for signs that will guide how they personalise the service 1.3 Let the customer know that they understand and that they are there to help 1.4 Identify opportunities to help or direct their customer outside of normal routines and procedures 1.5 Identify customers with particular needs who would especially appreciate personal service 1.6 Balance the time they take when giving individual attention to one customer with the needs and expectations of other customers 1.7 Make extra efforts to show how willing and able they are to give a more personal service

<p>2. Treat their customer as an individual</p>	<p>2.1 Greet and deal with their customer in a way that respects them as an individual</p> <p>2.2 Focus their attention on the customer they are dealing with</p> <p>2.3 Always communicate with their customer in a friendly and open way</p> <p>2.4 Use their customer's name when it is known and appropriate</p> <p>2.5 Follow their organisation's guidelines about giving their customer their own name and contact details</p> <p>2.6 Concentrate on building a 'one to one' relationship with their customer by making them feel valued and respected</p>
<p>3. Know and understand how to make customer service personal</p>	<p>3.1 Explain how the use of the customer's name makes service more personal</p> <p>3.2 Describe personality types and their receptiveness to personalised services</p> <p>3.3 Identify types of personal information about customers that should and should not be kept on record</p> <p>3.4 Identify features of personal service that are most appreciated by customers with individual needs</p> <p>3.5 Describe body language and approaches that promote open communication</p> <p>3.6 Describe the organisation's guidelines on actions that are permissible outside of the normal routines and procedures</p> <p>3.7 Explain their own preferences and comfort levels relating to how they are willing and able to personalise service</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of making customer service personal:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or sources have let you down
6. Your evidence must include examples of how you have dealt with customers who are:
 - a happy with the service they are receiving
 - b unhappy about the service they are receiving
7. You must provide evidence that you have made customer service more personal:
 - a when you have taken the initiative
 - b in response to an opportunity presented when your customer has asked a question.

Unit CU801 Go the Extra Mile in Customer Service

Aims

When the learner's customer feels that they have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to the customer's experience depend on the learner spotting what they will particularly appreciate. Often they can offer this little extra when sorting out a difficulty or problem. Whatever special service the learner gives when they "go the extra mile" must be within their own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has "gone the extra mile" to deliver special customer service.

Level: 2

Credit value: 6

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Distinguish between routine service standards and going the extra mile	1.1 Explain the service offer clearly and concisely 1.2 Identify their customer's expectations and needs 1.3 Match the service offer with their customer's expectations and needs and identify the key differences 1.4 Identify options for other actions that will give added value to customer service and might impress their customer 1.5 Choose actions that are most appropriate to impress their customer

<p>2. Check that your extra mile ideas are feasible</p>	<p>2.1 Match their ideas for added value customer service against their authority to see them through</p> <p>2.2 Check that their ideas for added value customer service are possible within their organisation's guidelines</p> <p>2.3 Check that their ideas for added value customer service are possible within regulatory boundaries</p> <p>2.4 Check that their ideas for added value customer service will not unreasonably affect the service to their other customers</p> <p>2.5 Explain their ideas for added value service to a senior colleague or other appropriate authority</p>
<p>3. Go the extra mile</p>	<p>3.1 Take action to go the extra mile in customer service</p> <p>3.2 Ensure that their customer is aware of the added value of their actions</p> <p>3.3 Monitor the effects of their added value actions to ensure that the service given to their other customers is not affected unreasonably</p> <p>3.4 Note and pass on positive feedback from their customer about their actions</p> <p>3.5 Suggest that an extra mile action becomes routine if they have seen it work several times and it could be accommodated within the service offer</p>

<p>4. Know how to go the extra mile in customer service</p>	<p>4.1 Describe their organisation's service offer</p> <p>4.2 Explain how customers form expectations of the service they will receive</p> <p>4.3 Identify what types of service action most customers will see as adding value to the customer service they have already had</p> <p>4.4 Outline their organisation's rules and procedures that determine their authority to go the extra mile</p> <p>4.5 Identify relevant legislation and regulation that impact on their freedom to go the extra mile</p> <p>4.6 Describe how their organisation receives customer service feedback on the types of customer experience that has impressed them</p> <p>4.7 Describe their organisation's procedures for making changes in its service offer</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of going the extra mile with customers:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down
5. Your evidence must show that you have:
 - a followed organisational procedures to go the extra mile for customers
 - b used your own initiative when going the extra mile for customers

Unit CU802 Deal With Customers Face to Face

Aims

This unit is about the skills the learner needs to deal with their customer in person and face to face. When they are working with a customer in this way, good feelings about the way the learner looks and behaves can improve how their customer feels about the transaction and give them greater satisfaction. Whilst verbal communication is important, the learner focus on their customer and the relationship that is formed also depends on the non-verbal communication that takes place between them. The learner will have many opportunities to impress their customer and their behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1. Communicate effectively with their customer</p>	<p>1.1 Plan a conversation with their customer that has structure and clear direction</p> <p>1.2 Hold a conversation with their customer that establishes rapport</p> <p>1.3 Focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation</p> <p>1.4 Explain their services or products and their organisation's service offer to their customer clearly and concisely</p> <p>1.5 Adapt their communication to meet the individual needs of their customer</p> <p>1.6 Anticipate their customer's requests and needs for information</p> <p>1.7 Balance conflicting demands for their attention whilst maintaining rapport with their current customer</p> <p>1.8 Calm down situations when one customer is adversely affecting the customer service enjoyed by other customers</p>

<p>2. Improve the rapport with their customer through body language</p>	<p>2.1 Present a professional and respectful image when dealing with their customer</p> <p>2.2 Show an awareness of their customer's needs for personal space</p> <p>2.3 Focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation</p> <p>2.4 Ensure that their customer focus is not disrupted by colleagues</p> <p>2.5 Observe all customers and the total customer service situation whilst maintaining rapport with their current customer</p> <p>2.6 Observe their customer to read non-verbal clues about the customer's wishes and expectations</p>
<p>3. Understand how to deal with customers face to face</p>	<p>3.1 Explain the importance of speaking clearly and slowly when dealing with a customer face to face</p> <p>3.2 State the importance of taking the time to listen carefully to what the customer is saying</p> <p>3.3 Identify the organisation's procedures that impact on the way they are able to deal with their customers face to face</p> <p>3.4 Describe the features and benefits of the organisation's services or products</p> <p>3.5 Explain the organisation's service offer and how it affects the way they deal with customers face to face</p> <p>3.6 Explain the principles of body language that enables them to interpret customer feelings without verbal communication</p> <p>3.7 Explain the difference between behaving assertively, aggressively and passively</p>

	<p>3.8 Explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction</p> <p>3.9 Describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. *(Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)*
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of dealing with customers who:
 - a have standard expectations of your organisation's customer service
 - b have experienced difficulties when dealing with your organisation
 - c have made a specific request for information
 - d need to be informed of circumstances of which they are unaware.
5. Your evidence must include examples of dealings with customers that are:
 - a planned
 - b unplanned.
6. You must provide evidence of dealing with customers face to face:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
7. You must include examples of how you have made use of :
 - a verbal communication skills
 - b non-verbal communication skills.

Unit CU803 Deal With Incoming Telephone Calls From Customers

Aims

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Level: 2

Credit value: 5

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
1. Use communication systems effectively	1.1 Operate telecommunication equipment efficiently and effectively 1.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer 1.3 Listen carefully when collecting information from their customer 1.4 Select the information they need to record and store following their organisation's guidelines 1.5 Update their customer records during or after the call to reflect the key points of the conversation
2. Establish rapport with customers who are calling	2.1 Greet their customer following their organisation's guidelines 2.2 Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call 2.3 Confirm the identity of their customer following organisational guidelines 2.4 Use effective and assertive questions to clarify their customer's requests

<p>3. Deal effectively with customer questions and requests</p>	<p>3.1 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each</p> <p>3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.3 Give clear and concise information to customers in response to questions or requests</p> <p>3.4 Use questions and answers to control the length of the conversation</p> <p>3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time</p> <p>3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague</p> <p>3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with</p> <p>3.9 Complete any follow up actions agreed during the call</p> <p>3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests</p> <p>3.11 Ensure that promises to call back are kept</p>
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<p>4. Know how to deal with incoming telephone calls from customers</p>	<p>4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment</p> <p>4.2 Explain how to operate the organisation's telecommunication equipment</p> <p>4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone</p> <p>4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone</p> <p>4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand</p> <p>4.6 Identify what information is important to note during or after telephone conversations with customers</p> <p>4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers</p> <p>4.8 Explain the importance of keeping their customer informed if they are on hold during a call</p> <p>4.9 Explain the importance of not talking across an open line</p> <p>4.10 List details that should be included if taking a message for a colleague</p> <p>4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers</p> <p>4.12 Describe their organisation's guidelines for handling abusive calls</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
5. Your evidence must include examples of dealing with customers who:
 - a have standard expectations of your organisation's customer service
 - b have experienced difficulties when dealing with your organisation
 - c have made a specific request for information
 - d need to be informed of circumstances of which they are unaware.
6. Your evidence must include examples of dealings with customers that are:
 - a planned
 - b unplanned.
7. You must provide evidence of dealing with customers by telephone:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down
8. You must provide evidence that you have taken messages that are passed on to colleagues:
 - a verbally
 - b in a form that maintains a permanent record.

Unit CU804 Make Telephone Calls to Customers

Aims

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan their calls effectively	<ul style="list-style-type: none">1.1 Use all appropriate customer information to plan their call1.2 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer1.3 Identify the objective of their call and the way in which they expect the call to end1.4 Plan the opening part of their conversation with their customer and anticipate possible responses
2. Use communication systems effectively	<ul style="list-style-type: none">2.1 Operate telecommunication equipment efficiently and effectively2.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer2.3 Listen carefully when collecting information from their customer2.4 Select the information they need to record and store following their organisation's guidelines2.5 Update their customer records during or after the call to reflect the key points of the conversation

<p>3. Make focussed calls to their customer</p>	<p>3.1 Open the conversation positively and establish a rapport with their customer</p> <p>3.2 Confirm the identity of their customer following organisational guidelines</p> <p>3.3 Ensure that their customer is aware of the purpose of their call as early as possible</p> <p>3.4 Respond positively to queries and objections from their customer</p> <p>3.5 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.6 Complete any follow up actions agreed during the call</p>
<p>4. Know how to make telephone calls to customers</p>	<p>4.1 Describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls</p> <p>4.2 Describe their organisation's guidelines and procedures for the use of telecommunication technology</p> <p>4.3 Explain how to operate their organisation's telecommunication technology</p> <p>4.4 Explain the importance of speaking clearly and slowly when dealing with customers by telephone</p> <p>4.5 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone</p> <p>4.6 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand</p> <p>4.7 Identify what information it is important to note during or after telephone conversations with customers</p> <p>4.8 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers</p> <p>4.9 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
5. Your evidence must include examples of dealing with customers who:
 - a are receptive to the content of your call
 - b are not receptive to the content of your call.
6. You must provide evidence of dealing with customers by telephone:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down

Unit CU818 Deal with Customers in Writing or Electronically

Aims

Some customer service delivery involves communicating with a customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with a customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

Level: 3

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Use written or electronic communication effectively	1.1 Operate equipment used to communicate in writing or electronically efficiently and effectively 1.2 Ensure that the period of time between exchanges in writing or electronically represents excellent customer service 1.3 Use language that is clear and concise 1.4 Adapt their use of language to meet the individual needs of their customer 1.5 Ensure that the style and tone of their written or electronic communication follows their organisation's guidelines and matches the service offer
2. Plan and send an effective written or electronic communication	2.1 Anticipate their customer's expectations taking account of any previous exchanges they may have had 2.2 Assemble all the information they need to construct the communication 2.3 Plan the objective of their communication 2.4 Format their communication following their organisation's guidelines 2.5 Open the communication positively to establish a rapport with their customer 2.6 Ensure that their customer is aware of the purpose of the communication as early as possible 2.7 Summarise the key point of the communication and any actions that they or their customer will take as a result

<p>3. Handle incoming written or electronic communications effectively</p>	<p>3.1 Read their customer's communication carefully to identify their precise reason for contacting you</p> <p>3.2 Identify what they are seeking as the outcome of the contact</p> <p>3.3 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each</p> <p>3.4 Choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.5 Summarise the outcome of the communication and any actions that they or their customer will take as a result</p>
<p>4. Know how to deal with customers in writing or electronically</p>	<p>4.1 Explain the importance of using clear and concise language</p> <p>4.2 Explain the additional significance and potential risks involved in committing a communication to a permanent record format</p> <p>4.3 Describe the effects of style and tone on the reader of a written or electronic communication</p> <p>4.4 Explain the importance of adapting their language to meet the needs of customers who may find the communication hard to understand</p> <p>4.5 Describe their organisation's guidelines and procedures relating to written and electronic communication</p> <p>4.6 Explain how to operate equipment used for producing and sending written or electronic communications</p> <p>4.7 Explain the importance of keeping their customer informed if there is likely to be any delay in responding to a communication</p> <p>4.8 Explain the risks associated with the confidentiality of written or electronic communications</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be in writing, by text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
5. Your evidence must include examples of dealing with customers who:
 - a have routine expectations of your organisation's customer service
 - b have experienced difficulties when dealing with your organisation
 - c have made a specific request for information
 - d need to be informed of circumstances of which they are unaware.
6. The style and tone of your communication must follow organisational guidelines and you must provide evidence that you have taken account of:
 - a your job role and position in your organisation
 - b the personal style and preferences of your customer
 - c the conventions of the medium of communication you are using.
7. You must show that you have communicated with customers when:
 - a you have initiated the contact
 - b you are responding to a customer.

Unit CU755 Use Customer Service as a Competitive Tool

Aims

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and products. The unit is not for a learner whose organisation does not compete actively with others.

Level: 3

Credit value: 8

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Organise customer service to gain a competitive advantage	1.1 Develop their own and colleagues' understanding of the services and products offered by their organisation 1.2 Define their organisation's service offer and the ways in which it compares with those of their competitors 1.3 Set an example for colleagues and present an image to their customers that reinforces their organisation's service offer 1.4 Encourage customer service actions that create and develop customer loyalty
2. Deliver a competitive service	2.1 Take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation's service offer 2.2 Remind customers about their service offer and the extra benefit it provides over those of their competitors 2.3 Offer additional technical advice to customers within their organisation's service offer 2.4 Show awareness of the financial implications of any added value actions that they or their colleagues might offer

	<p>2.5 Meet customer service targets to ensure that customers see the benefit of dealing with them rather than with a competitor</p> <p>2.6 Re-direct customers to other service providers without offence when their expectations cannot be met by the organisation's service offer</p> <p>2.7 Ensure that customers who have shown a previous interest in repeat and additional services are reminded of this</p> <p>2.8 Encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them</p>
<p>3. Understand how to use customer service as a competitive tool</p>	<p>3.1 Identify the factors that lead to customers' belief that they are enjoying value for money</p> <p>3.2 Describe the services and products offered by their organisation</p> <p>3.3 Describe the services and products offered by competitors</p> <p>3.4 Identify the features and benefits of services and products that are seen by customers as added value</p> <p>3.5 Explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty</p> <p>3.6 Explain how to portray a positive image that reinforces their organisation's competitive position</p> <p>3.7 Explain their organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position</p> <p>3.8 Describe complementary services and products that may be of interest to their customers</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:
 - a tangible in that they can be measured
 - b intangible in that they are represented solely by feelings and perceptions of the customer experience.
5. Your evidence must include examples of competitive analysis involving:
 - a direct competitors
 - b competitors offering substitute services or products.
6. Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
 - a loyal customers
 - b customers returning from competitors
 - c new customers.

Unit CU819 Organise the Promotion of Additional Services or Products to Customers

Aims

This unit is about expanding and extending the relationship with customers by persuading them to make use of additional services and products that the learner can offer. Services or products will remain viable only if they are used by customers. The unit covers the way the learner organises customer service to promote additional use of their services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring the successes and failures and recognising the best way to approach customers with additional services or products for the future. The learner needs to show that they are promoting the services or products by encouraging more people to use them.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Offer additional services or products	1.1 Offer additional services or products to customers 1.2 Identify the benefits of offering additional services or products for customers and the organisation 1.3 Explain the features and benefits of additional services or products to customers 1.4 Identify ways of encouraging customers to ask about additional services or products
2. Organise support to promote use of additional services or products	2.1 Discuss with others ways of promoting additional services or products to customers 2.2 Implement procedures to ensure that customers interested in additional services or products are dealt with promptly 2.3 Promote services or products which will suit customers but which are supplied from outside their own area of the organisation 2.4 Help customers to access services or products which are supplied outside of their own area of the organisation

<p>3. Monitor the promotion of additional services or products</p>	<p>3.1 Devise methods to inform customers about additional services or products</p> <p>3.2 Use different methods to inform customers about additional services and products and record successes and failures against each method</p> <p>3.3 Use their record of successes and failures to identify the best approach for offering additional services or products</p> <p>3.4 Share information with others regarding the best approach to take when offering additional services or products to customers</p>
<p>4. Understand how to organise and promote services or products to customers</p>	<p>4.1 Describe their organisation's procedures and systems for encouraging the use of additional services or products</p> <p>4.2 Explain how the use of additional services or products will benefit their customers</p> <p>4.3 Describe the main factors that influence customers to use their services or products</p> <p>4.4 Explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products</p> <p>4.5 Describe how to give appropriate, balanced information to customers about services or products</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you:
 - a use agreed organisational procedures and systems
 - b create your own opportunities.
5. Your evidence must show that you have:
 - a taken responsibility for your own actions in promoting services or products
 - b used spontaneous customer feedback to identify opportunities for promoting services or products
 - c used customer feedback that you have requested to identify opportunities for promoting services or products
6. Your evidence must include examples of:
 - a existing customers extending their use of your services or products
 - b new customers making use of your services or products.

Unit CU820 Build a Customer Service Knowledge Set

Aims

Effective and improving customer service may make use of a customer service knowledge set. This information base is built up continuously as the organisation learns from interaction with its customers. A knowledge set may contain a wide variety of information about customers and their transactions with the organisation. It will, in any case, rely on the actions of the learner and their colleagues in direct contact with customers to build and grow as a useful customer service tool. This unit is all about actions the learner takes to add to the information set and how they use it to develop the way they deal with customer transactions. This unit is for a learner only if their organisation has a systematic and technology supported approach to building a customer information set.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1. Input details of customer queries and requests and develop responses</p>	<p>1.1 Identify through active listening customer queries and comments for inclusion in the knowledge set</p> <p>1.2 Classify information collected through customer contact for inclusion in the knowledge set</p> <p>1.3 Identify questions frequently asked by customers</p> <p>1.4 Identify the broad customer service messages of their organisation's answers to frequently asked questions</p> <p>1.5 Work with colleagues to develop responses to customer queries and requests</p> <p>1.6 Contribute ideas and responses to the customer knowledge set which build on key organisational customer service messages</p> <p>1.7 Check the effects of possible responses included in the knowledge set with customers</p> <p>1.8 Monitor the customer service knowledge set to identify trends and patterns</p>

<p>2. Use a customer service knowledge base</p>	<p>2.1 Access information from the customer service knowledge set using specific search criteria</p> <p>2.2 Browse the customer service knowledge set to research a topic of interest or project area</p> <p>2.3 Use the customer service knowledge set to inform the introduction of a new product or service variation</p> <p>2.4 Use the customer service knowledge set to respond to a specific customer request or query</p> <p>2.5 Assist a colleague to locate specific information in the customer service knowledge set</p> <p>2.6 Add to the customer service knowledge set as a result of dealing with a customer request or query</p>
<p>3. Understand how to build a customer service knowledge set</p>	<p>3.1 Explain the structure and content of their organisation's customer service information set</p> <p>3.2 Describe how to input and update routines for adding to the customer service knowledge set</p> <p>3.3 Identify ways that information in a customer service knowledge set can be classified</p> <p>3.4 Identify questions frequently asked by customers of their organisation</p> <p>3.5 Explain the importance of working with colleagues to develop responses to customer requests and queries</p> <p>3.6 Describe their organisation's key messages in relation to the services or products they are delivering</p> <p>3.7 Identify ways to interpret information in a customer service knowledge set</p> <p>3.8 Describe techniques for assisting a colleague to locate information in a customer service knowledge set</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

There are no additional evidence requirements other than those expressed within the Unit.

Unit CU805 Do Your Job in a Customer Friendly Way

Aims

The customer service that the learner's organisation gives is affected by the way they do their job. Whatever job the learner is doing, customers expect them to do it properly. They also expect the learner to consider their wishes and feelings while they are doing it. Doing their job properly involves following procedures and doing the tasks in their job correctly as well as having the appropriate relationship with customers. This Unit covers how the learner does their job with their customer in mind in a way that the organisation and supervisors find acceptable. It will help the learner to understand the parts of their job that are most important to good customer service.

Level: 1

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1. Do their job in a customer friendly way</p>	<p>1.1 Make a good first impression</p> <p>1.2 Follow the dress code of their organisation and present the right personal image to their customers</p> <p>1.3 Do the tasks that make up their job in a way that shows they know what their customers expect and what their organisation offers</p> <p>1.4 Show consideration to customers when carrying out the tasks required in their job</p> <p>1.5 Respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague</p> <p>1.6 Share information with customers about how delivery of the product or service is going</p> <p>1.7 Work flexibly to help individual customers without reducing the level of service they give to others</p> <p>1.8 Share information with colleagues when they need it to provide good customer service</p>

<p>2. Know how to do their job in a customer-friendly way</p>	<p>2.1 Describe their organisation's dress code</p> <p>2.2 Describe how to do the tasks that make up their job</p> <p>2.3 Identify how long parts of the job take to do and how this may affect their customers</p> <p>2.4 Describe how to do their own work in an organised way</p> <p>2.5 Identify what their customers expect of them and their work</p> <p>2.6 Identify the organisations service offer and how this affects the way they do their work</p> <p>2.7 State what they are allowed to do and not allowed to do for customers</p> <p>2.8 State how to do their job in a way that is healthy and safe for them, their customers and their colleagues</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have done your job in a customer-friendly way:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job.
5. You need to include evidence that you are doing your job in a customer-friendly for customers who are:
 - a easy to deal with
 - b difficult to deal with.

Unit CU806 Deliver Reliable Customer Service

Aims

This Unit is about how the learner delivers consistent and reliable service to customers. As well as being good with people, the learner needs to work with their organisation's service systems to meet or exceed customer expectations. In the learners' job there will be many examples of how they combine their approach and behaviour with their organisation's systems. The learner will need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what they have done has met customer expectations. To meet this standard they have to deliver excellent customer service over and over again.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Prepare to deal with customers	1.1 Keep their knowledge of their organisation's services or products up-to-date 1.2 Ensure that the area they work in is tidy, safe and organised efficiently 1.3 Prepare and arrange everything they need to deal with customers before their shift or period of work commences
2. Give consistent service to customers	2.1 Make realistic customer service promises to customers 2.2 Ensure that their promises balance the needs of their customers and their organisation 2.3 Keep their promises to customers 2.4 Inform their customers if they cannot keep their promises due to unforeseen circumstances 2.5 Recognise when their customers' needs or expectations have changed and adapt their service to meet the new requirements 2.6 Keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation

<p>3. Check customer service delivery</p>	<p>3.1 Check that the service they have given meets their customers' needs and expectations</p> <p>3.2 Identify when they could have given better service to customers and how their service could have been improved</p> <p>3.3 Share information with colleagues and service partners to maintain and improve their standards of service delivery.</p>
<p>4. Know how to deliver reliable customer service</p>	<p>4.1 Describe their organisation's services or products</p> <p>4.2 Explain their organisation's procedures and systems for delivering customer service</p> <p>4.3 Describe methods or systems for measuring an organisation's effectiveness in delivering customer service</p> <p>4.4 Explain their organisation's procedures and systems for checking service delivery</p> <p>4.5 Explain their organisation's requirements for health and safety in their area of work</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you have worked with different customers who have different needs and expectations.
5. You must provide evidence of delivering reliable customer service:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

Unit CU807 Deliver Customer Service on Your Customer's Premises

Aims

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to customer's property. This unit is about the process of providing a service on customer premises whilst ensuring that the customer both enjoys the customer service experience and has confidence that the work carried out has been completed successfully. This unit is not simply about working in a different building. The learner's customer must be somebody who feels real ownership of the premises and is therefore somewhat protective about them. In particular, this unit is for the learner whose job takes them into their customers' homes.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1. Establish a rapport with their customer</p>	<p>1.1 Prepare for a visit to customer premises and ensure the customer knows when and why they will be there</p> <p>1.2 Identify themselves to their customer showing official identification whenever possible</p> <p>1.3 Show a positive and friendly approach to the service they are about to give</p> <p>1.4 Use language and behaviour that show respect for their customer</p> <p>1.5 Explain to their customer exactly what they are going to do and approximately how long they expect the work to take</p> <p>1.6 Listen to any concerns that their customer may have and reassure them</p> <p>1.7 Keep their customer informed of progress and about any cause for delay that might take place</p> <p>1.8 Keep their customer informed of any variation to the work that could involve additional time or cost</p> <p>1.9 Consult their customer when they have to do work that the customer had not expected</p>

<p>2. Combine customer service with their other skills and expertise</p>	<p>2.1 Show respect to customer's premises and possessions by treating them with care</p> <p>2.2 Make sure their customer is aware of their specialist technical skills</p> <p>2.3 Take time to give their customer confidence in their knowledge and skills</p> <p>2.4 Consider the customer service implications of each action and inform their customer of what will be involved</p> <p>2.5 Inform their customer when they have finished and reinforce how the work has been handled professionally</p> <p>2.6 Check that their customer is satisfied with the work and listen carefully to any feedback</p> <p>2.7 Inform their customer of timescales if any follow up work is involved</p> <p>2.8 Ensure that timescales for follow up work are kept</p> <p>2.9 Keep their customer informed if timescales for follow up work are not going to be met</p> <p>2.10 Explain clearly to their customer why they cannot do work that is not specified in the service offer</p> <p>2.11 Ensure that their customer has the appropriate details to contact their organisation if the customer needs to</p>
<p>3. Know how to deliver customer service on the customer's premises</p>	<p>3.1 Describe what they can do to establish a rapport with the customers</p> <p>3.2 Explain the importance of sensitivity to people's feelings about their own premises and possessions</p> <p>3.3 Explain the regulatory and legal restrictions on what they can and cannot do in all aspects of their work</p> <p>3.4 Explain the insurance implications of working on their customer's premises</p> <p>3.5 Describe the organisational procedures they would take if they cause any accidental damage on their customer's premises</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you deliver excellent customer service:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down
5. You must provide evidence that you deliver excellent customer service during:
 - a planned visits to your customer's premises
 - b visits to your customer's premises made at short notice.
6. You must provide evidence that you deliver excellent customer service:
 - a when your work goes to plan
 - b when your work does not go to plan.
7. You must provide evidence that you deliver excellent customer service:
 - a with your customer present
 - b when your customer is not present

Unit CU808 Recognise Diversity When Delivering Customer Service

Aims

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from actions based on stereotyping rather than on solid evidence obtained from the customer. This unit is about how the learner can establish their customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way the learner provides customer service to diverse groups of customers each of which has common likes and dislikes.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1. Respect customers as individuals and promote equality in customer service</p>	<p>1.1 Observe verbal and non-verbal clues that provide information about their customer's expectations and needs</p> <p>1.2 Identify and avoid features of stereotypes that might be applied to their customer that could carry the risk of causing offence</p> <p>1.3 Identify aspects of their customer's appearance or communication which risk leading them to treat the customer differently</p> <p>1.4 Consider aspects of their customer's appearance or communication in the light of their own beliefs about various groups of people that include their customer</p> <p>1.5 Question their customer to ensure that the impressions they are forming about their expectations and wishes are based on sound evidence</p> <p>1.6 Adjust their interpretation of the customer's expectations and wishes as a result of further evidence they have collected by talking to their customer</p>

<p>2. Adapt customer service to recognise the different needs and expectations of diverse groups of customers</p>	<p>2.1 Follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers</p> <p>2.2 Show respect for their customer's individual beliefs, expectations and needs that may result from membership of a particular group</p> <p>2.3 Vary their approach to their customer to take account of beliefs, expectations and needs that result from membership of a particular group</p> <p>2.4 Work with colleagues to identify consistent approaches that team members should adopt when dealing with a particular group</p>
<p>3. Understand how to recognise diversity when delivering customer service</p>	<p>3.1 Explain the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status</p> <p>3.2 Explain why consideration of diversity and inclusion issues affect customer service</p> <p>3.3 Describe organisational guidelines to make customer service inclusive for diverse groups of customers</p> <p>3.4 Explain how to observe and interpret non-verbal clues</p> <p>3.5 Describe how to listen actively for clues about their customer's expectations and needs</p> <p>3.6 Identify techniques for obtaining additional information from customers through tactful and respectful questions</p> <p>3.7 Describe behaviour that might cause offence to specific groups of people to whom they regularly provide customer service</p> <p>3.8 Explain how to impress specific groups of people to whom they regularly provide customer service</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have developed your approach to diversity taking account of:
 - a relevant legislation
 - b sector or industry codes of practice
 - c the policies and procedures of your own organisation.
5. You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to four of these sources of diversity:
 - a age
 - b disability
 - c national origin
 - d sexual orientation
 - e values
 - f ethnic culture
 - g education
 - h lifestyle
 - i beliefs
 - j physical appearance
 - k social class
 - l economic status.
6. You must provide examples of situations when you have adapted your behaviour to:
 - a deliberately adopt different approaches to different groups of customers
 - b deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements.

Unit CU809 Deal With Customers Across a Language Divide

Aims

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

Level: 2

Credit value: 8

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Prepare to deal with customers with a different first language	1.1 Identify the language or languages other than their own that they are most likely to come across when dealing with customers 1.2 Learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter 1.3 Identify a source of assistance with a language they expect to encounter when delivering customer service 1.4 Agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language 1.5 Log useful words and phrases to support their dealings with a customer with a different first language 1.6 Learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently

<p>2. Deal with customers who speak a different first language from their own</p>	<p>2.1 Identify their customer's first language and indicate to the customer that they are aware of this</p> <p>2.2 Establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs</p> <p>2.3 Speak clearly and slowly if using a language which is not the first language for either them or their customer</p> <p>2.4 Maintain a consistent tone and volume when dealing with somebody across a language divide</p> <p>2.5 Listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words</p> <p>2.6 Check their understanding of specific words with their customer using questions for clarification</p> <p>2.7 Seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers</p> <p>2.8 Reword a question or explanation if their customer clearly does not understand their original wording</p> <p>2.9 Use a few words of their customer's first language to create a rapport</p>
<p>3. Know how to deal with customers across a language divide</p>	<p>3.1 List the languages that they are most likely to encounter among groups of their customers</p> <p>3.2 State how to greet, thank and say farewell to customers in their first languages</p> <p>3.3 Explain the importance of dealing with customers in their first language if possible</p> <p>3.4 Describe how to explain to a customer that they cannot hold an extended conversation in their first language</p> <p>3.5 Explain the importance of tone, pace and volume when dealing with customers across a language divide</p> <p>3.6 Identify possible sources of assistance to use when a language barrier demands additional language skills</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of dealing with customers across a language divide:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job.

Unit CU810 Use Questioning Techniques When Delivering Customer Service

Aims

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Level: 2

Credit value: 4

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Establish rapport and identify customer concerns	<ul style="list-style-type: none">1.1 Greet their customer sincerely and invite a full and open response1.2 Use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry1.3 Invite more detailed explanation from their customer1.4 Listen closely to their customer's responses to strengthen their understanding of customer concerns1.5 Use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation1.6 Identify and note their customer's feelings and mood in relation to the information they are seeking

<p>2. Seek detailed information from customers using questioning techniques</p>	<p>2.1 Follow a planned trail of questions to explore in detail customer concerns they have already identified</p> <p>2.2 Hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified</p> <p>2.3 Explain to their customer why they need the information they are asking for</p> <p>2.4 Use probing and searching questions that draw on comments or words used by their customer</p> <p>2.5 Thank their customer for the information in a way that encourages further open responses</p> <p>2.6 Use pre-planned routing and trigger questions that lead their customer to respond in new areas</p> <p>2.7 Follow organisational procedures to record customer responses to inform future actions</p>
<p>3. Understand how to use questioning techniques when delivering customer service</p>	<p>3.1 Explain why establishing rapport makes it easier to draw information from customers</p> <p>3.2 Describe ways to greet customers that immediately build rapport</p> <p>3.3 Explain reasons for using planned question patterns to draw out particular information</p> <p>3.4 Explain reasons for using spontaneous conversation to draw out particular information</p> <p>3.5 Explain the importance of active listening when seeking detailed information from customers</p> <p>3.6 Identify the differences between and uses of closed and open questions</p> <p>3.7 Describe the importance of explaining to customers why information is needed</p> <p>3.8 Explain why particular trigger questions are effective in gaining specific information</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of using questioning techniques when delivering customer service:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
5. You need to include evidence of using questioning techniques with customers who are:
 - a. easy to deal with
 - b. difficult to deal with.

Unit CU811 Deal With Customers Using Bespoke Software

Aims

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Prepare to deliver customer service using bespoke software	1.1 Sign on and open access to appropriate functions in the IT system 1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas 1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver 1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed 1.5 Prepare their work area to deliver customer service using bespoke software

<p>2. Deliver customer service using bespoke software</p>	<p>2.1 Identify their customer or the services or products they wish to access</p> <p>2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs</p> <p>2.3 Use search or other specialist functions within the software to respond to customer requests</p> <p>2.4 Enter new records using the bespoke software system</p> <p>2.5 Amend customer service records in the bespoke software system</p> <p>2.6 Communicate with their customers in terms they can understand relating to the software system</p> <p>2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software</p> <p>2.8 Interpret error messages and act on them to support their customer service</p> <p>2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction</p>
<p>3. Understand how to deal with customers using bespoke software</p>	<p>3.1 Describe access and sign-on routines for the bespoke software system</p> <p>3.2 Describe the architecture and geography of the bespoke software system</p> <p>3.3 Identify different screen or menu routes that can be followed to meet customer requirements</p> <p>3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines</p> <p>3.5 Explain the importance of preparing a work area before delivering customer service</p> <p>3.6 Explain search or other enquiry facilities within the bespoke software system</p> <p>3.7 State the importance of avoiding jargon and system terminology when communicating with customers</p>

	<p>3.8 Describe ways to respond to error messages when using a bespoke software system</p> <p>3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of dealing with customers using bespoke software:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

Unit CU812 Maintain Customer Service Through Effective Hand Over

Aims

Customer service delivery in a team involves many situations when the learner is unable to see actions through and they pass on responsibility to a colleague. This sharing of responsibility should be organised and follow a recognised pattern. Most of all the learner needs to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with their colleagues that customer service actions have been completed. This unit is for a learner whose job involves service delivery as part of a team and who regularly passes on responsibility for completion of a customer service action to a colleague.

Level: 2

Credit value: 4

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Agree joint responsibilities in a customer service team	1.1 Identify services or products they are involved in delivering that rely on effective teamwork 1.2 Identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues 1.3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another 1.4 Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action 1.5 Identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action

<p>2. Check that customer service actions are seen through by working together with colleagues</p>	<p>2.1 Access reminders to identify when to check that a customer service action has been completed</p> <p>2.2 Ensure that they are aware of all details of customer service actions their colleague was due to complete</p> <p>2.3 Ask their colleague about the outcome of them completing the customer service action as agreed</p> <p>2.4 Identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed</p> <p>2.5 Work with colleagues to review the way in which customer service actions are shared</p>
<p>3. Understand how to maintain customer service through effective handover</p>	<p>3.1 Explain their organisation's customer service procedures for the services or products they are involved in delivering</p> <p>3.2 Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions</p> <p>3.3 Describe ways of ensuring that information is passed between them and their colleagues effectively</p> <p>3.4 Identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague</p> <p>3.5 Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting</p> <p>3.6 Identify opportunities for contributing to review the way customer service actions are shared in customer service processes</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of maintaining customer service through effective hand over:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
5. You do not need to be more senior than your colleague or be their supervisor to pass on responsibility to them for customer service actions or check completion.

Unit CU821 Deliver Customer Service Using Service Partnerships

Aims

Excellent customer service relies on teamwork. In many situations, successful delivery of service to end user customers relies on a complete service chain of internal or external customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively. This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and understanding of the roles of different organisations, departments and individuals are central to this area of the learner’s work.

Level: 3

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Work effectively within a customer service chain	1.1 Explain who is involved in the service chain that supplies their end user customers 1.2 Identify which of those involved in their service chain is internal and which is external to their organisation 1.3 Explain how the way they work with individual service partners contributes to an overall service chain 1.4 Use the principles and practices applied to external customers to deliver excellent customer service to internal customers 1.5 Work with internal customers and internal or external suppliers in the service chain to improve service to external customers 1.6 Communicate effectively with internal customers to ensure that those customers are aware of any aspects of their work that might affect them

<p>2. Build and nurture positive relationships in a customer service chain</p>	<p>2.1 Create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain</p> <p>2.2 Identify where power and authority exist within the service chain</p> <p>2.3 Negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service</p> <p>2.4 Develop positive relationships with an internal customer or supplier that are reflected in a formal or informal service level agreement that makes a positive contribution to the relationship</p> <p>2.5 Work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation</p> <p>2.6 Agree with service partners how their work will be prioritised if there is a conflict of interest between the demands of internal and external customers</p>
<p>3. Understand how to maintain customer service through effective handover</p>	<p>3.1 Describe the responsibilities and rights that can be built into an internal customer/supplier relationship</p> <p>3.2 Compare the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership</p> <p>3.3 Explain how to establish priorities if internal customer demands conflict with external customer demands</p> <p>3.4 Describe how to maintain team identity whilst working constructively with other teams to deliver excellent customer service</p> <p>3.5 Explain how to negotiate successfully with internal customers or suppliers</p> <p>3.6 evaluate the formal and informal structures of the organisation and how they can influence relationships</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must produce evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The service level agreement between service partners in your evidence may be formal or informal.
5. You must provide examples of working in a service partnership on occasions when:
 - a the service partners are cooperative
 - b the service partners are un-cooperative.
6. You must include evidence to show that you have worked in a service partnership with:
 - a regular or long term suppliers
 - b new suppliers.
7. Your evidence must show that you have negotiated agreements with service partners that are of benefit to:
 - a your organisation
 - b your service partner

Unit CU822 Organise the Delivery of Reliable Customer Service

Aims

This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which support the service that they give. In the learner's job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.

Level: 3

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan and organise the delivery of reliable customer service	1.1 Plan, prepare and organise everything they need to deliver services or products to different types of customers 1.2 Organise what they do to ensure that they are consistently able to give prompt attention to your customers 1.3 Reorganise their work to respond to unexpected additional workloads
2. Review and maintain customer service delivery	2.1 Maintain service delivery during very busy periods and unusually quiet periods 2.2 Maintain service delivery when systems, people or resources have let them down 2.3 Consistently meet their customers' expectations 2.4 Balance the time they take with their customers with the demands of other customers seeking their attention 2.5 Respond appropriately to their customers when customers make comments about the products or services they are offering 2.6 Alert others to repeated comments made by their customers

	<p>2.7 Take action to improve the reliability of their service based on customer comments</p> <p>2.8 Monitor the action they have taken to identify improvements in the service they give to their customers</p>
<p>3. Use recording systems to maintain reliable customer service</p>	<p>3.1 Record and store customer service information accurately following organisational guidelines</p> <p>3.2 Select and retrieve customer service information that is relevant, sufficient and in an appropriate format</p> <p>3.3 Quickly locate information that will help solve a customer's query</p> <p>3.4 Supply accurate customer service information to others using the most appropriate method of communication</p>
<p>4. Understand how to organise the delivery of reliable customer service</p>	<p>4.1 Describe organisational procedures for unexpected situations and their role within them</p> <p>4.2 Describe resource implications in times of staff sickness and holiday periods and their responsibility at these times</p> <p>4.3 Explain the importance of having reliable and fast information for their customers and their organisation</p> <p>4.4 Evaluate the organisational procedures and systems for delivering customer service</p> <p>4.5 Identify useful customer feedback and explain how to decide which feedback should be acted on</p> <p>4.6 Describe how to communicate feedback from customers to others</p> <p>4.7 Evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information</p> <p>4.8 Explain the legal and regulatory requirements regarding the storage of data</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You need to include evidence that you have dealt with a variety of customers including:
 - a customers who are easy to deal with
 - b customers who are difficult to deal with
 - c existing customers
 - d new customers.
5. Your evidence must show that you have:
 - a taken responsibility for your own actions in the delivery of customer service
 - b used spontaneous customer feedback to improve customer service
 - c used customer feedback that you have requested to improve customer service
6. The system you use for recording data can be manual or electronic.

Unit CU823 Improve the Customer Relationship

Aims

To improve relationships with their customers, learners need to deliver consistent and reliable customer service. In addition, customers need to feel that the learner genuinely wants to give them high levels of service and that the learner makes every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. The learner needs to be proactive in their dealings with their customers and to respond professionally in all situations. The learner needs to negotiate between their customers and their organisation or department in order to find some way of meeting their customers' expectations. In addition the learner needs to make extra efforts to delight their customers by exceeding customer service expectations.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Improve communication with their customers	1.1 Select and use the best method of communication to meet their customers' expectations 1.2 Take the initiative to contact their customers to update them when things are not going to plan or when they require further information 1.3 Adapt their communication to respond to individual customers' feelings
2. Balance the needs of their customer and the organisation	2.1 Meet their customers' expectations within their organisation's service offer 2.2 Explain the reasons to their customers sensitively and positively when customer expectations cannot be met 2.3 Identify alternative solutions for their customers either within or outside the organisation 2.4 Identify the costs and benefits of these solutions to their organisation and to their customers 2.5 Negotiate and agree solutions with their customers which satisfy them and are acceptable to their organisation 2.6 Take action to satisfy their customers with the agreed solution when balancing customer needs with those of their organisation

<p>3. Exceed customer expectations to develop the relationship</p>	<p>3.1 Make extra efforts to improve their relationship with their customers</p> <p>3.2 Recognise opportunities to exceed their customers' expectations</p> <p>3.3 Take action to exceed their customers' expectations within the limits of their own authority</p> <p>3.4 Gain the help and support of others to exceed their customers' expectations</p>
<p>4. Understand how to improve the customer relationship</p>	<p>4.1 Describe how to make best use of the method of communication chosen for dealing with their customers</p> <p>4.2 Explain how to negotiate effectively with their customers</p> <p>4.3 Explain how to assess the costs and benefits to their customers and their organisation of any unusual agreement they make</p> <p>4.4 Explain the importance of customer loyalty and/or improved internal customer relationships to their organisation</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of using:
 - a organisational procedures
 - b exceptions to standard practice that are legal and benefit your organisation.
5. You need to provide evidence that you have dealt with customers who:
 - a have different needs and expectations
 - b appear angry or confused
 - c behave unusually.

Unit CU813 Recognise and Deal With Customer Queries, Requests and Problems

Aims

No matter how good the learner is at providing consistent and reliable customer service, some of their customers will from time to time expect more. They can signal this in various ways and when they do the learner must know how to handle it. Sometimes customers ask different questions and request special treatment. The learner may be able to help them and they certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. The learner's job is to recognise that there is a problem and make sure that the appropriate person deals with it.

Level: 1

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Recognise and deal with customer queries and requests	1.1 Deal with queries and requests from customers in a positive and professional way 1.2 Seek information or help from a colleague if they cannot answer their customer's query or request 1.3 Obtain help from a colleague if they are not able to deal with their customer's request 1.4 Always tell their customer what is happening
2. Recognise and deal with customer problems	2.1 Recognise when something is a problem from the customer's point of view 2.2 Avoid saying or doing anything which may make the problem worse 2.3 Deal with a difficult customer calmly and confidently 2.4 Recognise when to pass a problem on to an appropriate colleague 2.5 Pass the problem on to their colleague with the appropriate information 2.6 Check that the customer knows what is happening

<p>3. Know how to recognise and deal with customer queries, requests and problems</p>	<p>3.1 List who in the organisation is able to give help and information</p> <p>3.2 State the limits of what they are allowed to do</p> <p>3.3 Identify what professional behaviour is</p> <p>3.4 Describe how to speak to people who are dissatisfied</p> <p>3.5 Describe how to deal with difficult people</p> <p>3.6 State what customers normally expect</p> <p>3.7 Identify how to recognise a problem from what a customer says or does</p> <p>3.8 Describe what kinds of behaviours/actions would make situations worse</p> <p>3.9 List the organisational procedures they must follow when they deal with problems or complaints</p> <p>3.10 Identify the types of behaviour that may make a problem worse</p>
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Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (*Guidelines for the assessment of Simulated Activities and a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of problems which are:
 - a brought to your attention by customers
 - b identified first by you and/or by your colleagues.
5. The problems included in your evidence must include examples of:
 - a a difference between customer expectations and what is offered by your organisation
 - b a problem resulting from a system or procedure failure.

Unit CU814 Take Details of Customer Service Problems

Aims

However good the customer service of the learners' organisation is, some problems will occur. Learners may not have the authority or experience to deal with the problem by themselves so it is important to collect helpful information for those who will deal with it. The learner will need to be able to identify that there is a problem, discover detailed information about that problem and pass on the information so that the problem can be tackled. This unit is about how to collect information about a customer service problem, pass it to the right people in the organisation and keep the customer informed about what is being done.

Level: 1

Credit value: 4

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Respond to customers who raise a problem	1.1 Recognise when their customer is raising a problem 1.2 Respond to their customer calmly and helpfully 1.3 Take details that will identify their customer
2. Gather details from customers who raise a problem	2.1 Ask their customer questions to clarify what has or has not happened to cause a problem 2.2 Check their understanding of what their customer sees as the problem 2.3 Ask their customer questions to clarify the customer's expectations about the service or product that is now causing a problem 2.4 Note the details of what their customer tells them about the problem 2.5 Confirm with their customer details of what the customer has told them about the problem

<p>3. Pass details of problems raised by customers to the colleague who can deal with them</p>	<p>3.1 Collect details of any reference codes or identifiers which their organisation uses to identify the customer transaction that is now causing a problem</p> <p>3.2 Gather any other details that are relevant to resolving the problem from colleagues, customer service records or product specifications</p> <p>3.3 Tell their customer what they will do with the details of the problem so that action is taken</p> <p>3.4 Tell their customer what to expect without making customer service promises that may not be met</p> <p>3.5 Pass the details to a colleague who is able to deal with the problem</p>
<p>4. Know how to take details of customer service problems</p>	<p>4.1 Identify customer expectations of the organisation's services or products that may cause problems if they are not met</p> <p>4.2 Describe how to respond to customers who raise problems in a way that the customers will find calm and helpful</p> <p>4.3 Name reference codes or identifiers their organisation uses to identify customers</p> <p>4.4 Identify questions that can be used to gather information that will be most helpful in resolving a problem</p> <p>4.5 State details their organisation needs to resolve a problem</p> <p>4.6 Describe details their organisation uses to identify specific customer transactions</p> <p>4.7 Name the appropriate colleagues to whom details of problems should be passed</p> <p>4.8 Identify their organisation's preferences for the way in which details of problems should be passed on</p>

Evidence Requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (*Guidelines for the assessment of Simulated Activities and a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You need to include evidence of taking details of customer service problems from customers who are:
 - a. easy to deal with
 - b. difficult to deal with.
5. You may include evidence that you have passed details to a colleague able to deal with the problem either verbally or in writing.

Unit CU815 Resolve Customer Service Problems

Aims

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner's job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer's expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Spot customer service problems	1.1 Listen carefully to customers about any problem they have raised 1.2 Ask customers about the problem to check their understanding 1.3 Recognise repeated problems and alert the appropriate authority 1.4 Share customer feedback with others to identify potential problems before they happen 1.5 Identify problems with systems and procedures before they begin to affect customers
2. Pick the best solution to resolve customer service problems	2.1 Identify the options for resolving a customer service problem 2.2 Work with others to identify and confirm the options to resolve a customer service problem 2.3 Work out the advantages and disadvantages of each option for their customer and the organisation 2.4 Pick the best option for their customer and the organisation 2.5 Identify for their customer other ways that problems may be resolved if they are unable to help

<p>3. Take action to resolve customer service problems</p>	<p>3.1 Discuss and agree the options for solving the problem with their customer</p> <p>3.2 Take action to implement the option agreed with their customer</p> <p>3.3 Work with others and their customer to make sure that any promises related to solving the problem are kept</p> <p>3.4 Keep their customer fully informed about what is happening to resolve the problem</p> <p>3.5 Check with their customer to make sure the problem has been resolved to the customer's satisfaction</p> <p>3.6 Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction</p>
<p>4. Know how to resolve customer service problems</p>	<p>4.1 Describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 Explain how to defuse potentially stressful situations</p> <p>4.3 Describe how to negotiate</p> <p>4.4 Identify the limitations of what they can offer their customer</p> <p>4.5 Describe types of action that may make a customer problem worse and should be avoided</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of resolving problems involving each of the following:
 - a a problem first identified by customers
 - b a problem identified within the organisation before it has affected your customer
 - c a problem caused by differences between your customer's expectations and what your organisation can offer
 - d a problem caused by a system or procedure failure
 - e a problem caused by a lack of resources or human error.
5. You must provide evidence that you:
 - a supplied relevant information when customers have requested it
 - b supplied relevant information when customers have not requested it
 - c have used agreed organisational procedures when solving problems
 - d have made exceptions to usual practice with the agreement of others.

Unit CU816 Deliver Customer Service to Difficult Customers

Aims

Many organisations have a significant proportion of difficult customers. The customer’s attitude may be difficult simply because they believe that a threat or problem exists before they contact the organisation. They may become difficult or even aggressive when they discover that their expectations are not going to be met by the organisation. They may be very concerned or nervous about the outcome of dealing with the organisation. In either case, they are difficult to deal with and need the learners’ understanding. This unit is about dealing directly with these customers and trying to reach a resolution that satisfies everybody or at least reduces the risk of dissatisfaction. The learner should choose this unit only if they recognise the content as applying to a reasonable proportion of their exchanges with customers. Do not choose this unit if it will be hard to find evidence because the learner only occasionally deals with a difficult customer.

Level: 2

Credit value: 6

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
<p>1. Recognise when customers may be difficult to deal with</p>	<p>1.1 Recognise types of customer behaviour that are difficult to deal with</p> <p>1.2 Identify aspects of their organisation’s services or products that make it difficult to deal with customers</p> <p>1.3 Identify the signs and signals that indicate a customer may be difficult to deal with</p> <p>1.4 Put themselves in their customer’s position and see the situation from the customer’s point of view</p> <p>1.5 Identify reasons why their customers may be behaving in a way that is difficult to deal with</p> <p>1.6 Recognise the limits of difficult customer behaviour that their organisation will tolerate</p> <p>1.7 Identify things that they may do or say that will provoke difficult responses from their customer</p>

<p>2. Deal with difficult customers</p>	<p>2.1 Listen patiently to what their customer wants to tell them</p> <p>2.2 Use direct and factual questions about their customer's feelings and what has happened to identify what might satisfy the customer</p> <p>2.3 Check their understanding of their customer's concerns by describing their view of the situation and options that might be available</p> <p>2.4 Express empathy with their customer without necessarily admitting fault on the part of their organisation</p> <p>2.5 Give clear statements or explanations of their organisation's position</p> <p>2.6 Agree a way forward that balances customer satisfaction with the needs of their organisation</p> <p>2.7 Enlist help from colleagues if options for action are outside of their authority</p> <p>2.8 Summarise clearly actions to be taken and reasons for those actions to complete the customer transaction</p> <p>2.9 Advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them</p> <p>2.10 Take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer</p>
<p>3. Understand how to deliver customer service to difficult customers</p>	<p>3.1 Describe the types of customer behaviour that they personally find difficult to deal with</p> <p>3.2 Identify reasons why some aspect of their organisation's services or products may provoke difficult behaviour from customers</p> <p>3.3 Identify reasons why their customer's own actions may cause them to behave in a way that is difficult to deal with</p> <p>3.4 Explain the meaning of having empathy for a customer's feelings</p> <p>3.5 Identify who can be asked for help when dealing with a difficult customer</p>

	<p>3.6 Explain the difference between assertive, aggressive and passive behaviour</p> <p>3.7 Describe the importance of not simply quoting their organisation's rules and procedures to counter their customer's difficult behaviour</p> <p>3.8 State their organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed</p> <p>3.9 Explain the importance of giving their manager or the appropriate colleagues notice of any further approaches from a difficult customer</p> <p>3.10 Identify when it might be necessary to take action to protect their own safety or that of other customers or colleagues from a difficult customer</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
5. You must provide evidence of delivering customer service to difficult customers:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

Unit CU756 Monitor and Solve Customer Service Problems

Aims

The learner’s job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Level: 3

Credit value: 6

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
1. Solve immediate customer service problems	1.1 Respond positively to customer service problems following organisational guidelines 1.2 Solve customer service problems when they have sufficient authority 1.3 Work with others to solve customer service problems 1.4 Keep customers informed of the actions being taken 1.5 Check with customers that they are comfortable with the actions being taken 1.6 Solve problems with service systems and procedures that might affect customers before customers become aware of them 1.7 Inform managers and colleagues of the steps taken to solve specific problems

<p>2. Identify repeated customer service problems and options for solving them</p>	<p>2.1 Identify repeated customer service problems</p> <p>2.2 Identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option</p> <p>2.3 Work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation</p>
<p>3. Take action to avoid the repetition of customer service problems</p>	<p>3.1 Obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated</p> <p>3.2 Action their agreed solution</p> <p>3.3 Keep their customers informed in a positive and clear manner of steps being taken to solve any service problems</p> <p>3.4 Monitor the changes they have made and adjust them if appropriate</p>
<p>4. Understand how to monitor and solve customer service problems</p>	<p>4.1 Describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 Describe the organisational procedures and systems for identifying repeated customer service problems</p> <p>4.3 Explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers</p> <p>4.4 Explain how to negotiate with and reassure customers while their problems are being solved</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of problems which are:
 - a brought to your attention by customers
 - b are identified first by you and/or by a colleague.
5. The problems included in your evidence must include examples of a:
 - a difference between customer expectations and what is offered by your organisation
 - b problem resulting from a system or procedure failure
 - c problem resulting from a shortage of resources or human error.
6. You must show that you have considered the options for solving problems from the point of view of:
 - a your customer
 - b the potential benefits to your organisation
 - c the potential risks to your organisation.
7. You must provide evidence that you have made use of options that:
 - a follow organisational procedures or guidelines
 - b make agreed and authorised exceptions to usual practice.

Unit CU817 Apply Risk Assessment to Customer Service

Aims

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Level: 3

Credit value: 10

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
<p>1. Analyse customer service processes for risk</p>	<p>1.1 Explain their organisation's customer service process and identify the moments of truth (those points in the customer service process that have most impact on the customer experience)</p> <p>1.2 Identify the financial risks for each stage of the customer service process</p> <p>1.3 Identify the reputational risks for each stage of the customer service process</p> <p>1.4 Identify the health and safety risks for each stage of the customer service process</p> <p>1.5 Identify the risk of delivering sub-standard services or products for each stage of the customer service process</p> <p>1.6 Ensure that your customers are aware of any risks that might impact on them</p> <p>1.7 Develop staff awareness of the risks they have identified</p>

<p>2. Assess customer service risks and take appropriate actions</p>	<p>2.1 Assess the probabilities of each risk that they have identified</p> <p>2.2 Assess the consequence of each risk in terms of finance, reputation and health and safety</p> <p>2.3 Classify each risk as high, medium or low taking into account its probability and consequences</p> <p>2.4 Work with colleagues to identify any actions that might be taken to reduce risk</p> <p>2.5 Take appropriate actions to minimise the overall customer service risk profile by adapting procedures</p>
<p>3. Understand how to apply risk assessment to customer service</p>	<p>3.1 Describe risk assessment techniques</p> <p>3.2 Explain how to evaluate risk according to probability of occurrence and consequences of occurrence</p> <p>3.3 Evaluate the nature of potential customer service risks including financial, reputational and health and safety risks</p> <p>3.4 Explain cost/benefit analysis</p> <p>3.5 Define SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The procedures you follow for risk assessment may be formal or informal and may or may not be written.
5. You must provide evidence that you have identified risks in your own area of responsibility:
 - a through your everyday work
 - b actively carrying out a risk assessment
 - c through discussion with colleagues.
6. Your evidence must show that when carrying out a risk assessment you have:
 - a listed each risk
 - b identified the consequences of each risk
 - c estimated the probability of each risk occurring
 - d made a judgement about any action that is justified taking into account the consequences and probability of each risk.
7. You must provide evidence that you have worked with two of these groups of people to identify possible actions for managing risk:
 - a team members or colleagues
 - b suppliers or service partners
 - c supervisors, team leaders or managers.
8. Your evidence must show that you have carried out risk assessments that have caused you to:
 - a take action to manage the risk
 - b decide that the level of risk is tolerable and take no action.

Unit CU824 Process Customer Service Complaints

Aims

This unit is about the process of handling complaints. In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case the learner's customer expects them to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered. The learner's organisation may have detailed and formal procedures for dealing with complaints.

Level: 3

Credit value: 6

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
1. Recognise the signs that a query or problem is about to produce a complaint	1.1 Identify signs that a customer is becoming dissatisfied with the customer service of their organisation 1.2 Take action to change the situation so that the query or problem does not result in a complaint 1.3 Take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made
2. Deal with a complaint effectively	2.1 Ensure that they have a clear understanding of the nature and details of the complaint 2.2 Investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint 2.3 Identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation 2.4 Assess the risks to their organisation of choosing each option 2.5 Report the findings of their investigation to their customer and offer their chosen solution

	<p>2.6 Escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so</p> <p>2.7 Give feedback to other colleagues involved which will help them avoid future complaints</p> <p>2.8 Keep clear records of the way the complaint has been handled to avoid later misunderstandings</p>
<p>3 Understand how to process customer service complaints</p>	<p>3.1 Explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery</p> <p>3.2 Explain why dealing with complaints is an inevitable part of delivering customer service</p> <p>3.3 Describe organisational procedures for dealing with complaints</p> <p>3.4 Explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation</p> <p>3.5 Explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported</p> <p>3.6 Explain when to escalate a complaint by involving more senior members of the organisation or an independent third party</p> <p>3.7 Explain the cost and regulatory implications of admitting liability for an error made by their organisation</p> <p>3.8 Identify how to spot and interpret signals that their customer may be considering making a complaint</p> <p>3.9 Describe techniques for handling conflict</p> <p>3.10 Explain the importance of dealing with a complaint promptly</p> <p>3.11 Explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint</p> <p>3.12 Explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you have processed complaints that are seen by your organisation as:
 - a justified
 - b unjustified.
5. You must provide evidence of processing customer service complaints:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
6. You need to provide evidence that you have dealt with customers who:
 - a have different needs and expectations
 - b appear angry or confused
 - c behave unusually.
7. You must provide evidence that you have processed complaints and taken full account of:
 - a organisational procedures
 - b sector or industry codes of practice
 - c legislation.

Unit CU825 Develop Customer Relationships

Aims

When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer's confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation's service and being comfortable with it. The learner's customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.

Level: 2

Credit value: 6

Learning outcomes	Assessment criteria
<i>The learner will:</i>	<i>The learner can:</i>
1. Build their customer's confidence that the service they give will be excellent	1.1 Show that they behave assertively and professionally with customers 1.2 Allocate the time they take to deal with their customer following organisational guidelines 1.3 Reassure their customer that they are doing everything possible to keep the service promises made by the organisation
2. Meet the expectations of their customers	2.1 Recognise when there may be a conflict between their customer's expectations and your organisation's service offer 2.2 Balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer 2.3 Work effectively with others to resolve any difficulties in meeting their customer's expectations

<p>3. Develop the long term relationship between their customer and their organisation</p>	<p>3.1 Give additional help and information to their customer in response to customer questions and comments about their organisation's services or products</p> <p>3.2 Discuss expectations with their customer and explain how these compare with their organisation's services or products</p> <p>3.3 Advise others of feedback received from their customer</p> <p>3.4 Identify new ways of helping customers based on the feedback customers have given them</p> <p>3.5 Identify added value that their organisation could offer to long-term customers</p>
<p>4. Know how to develop customer relationship</p>	<p>4.1 Describe their organisation's services or products</p> <p>4.2 Explain the importance of customer retention</p> <p>4.3 Explain how their own behaviour affects the behaviour of the customer</p> <p>4.4 Describe how to behave assertively and professionally with customers</p> <p>4.5 Describe how to defuse potentially stressful situations</p> <p>4.6 Identify the limitations of their organisation's service offer</p> <p>4.7 Compare how customer expectations may change as the customer deals with their organisation</p> <p>4.8 Identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations</p> <p>4.9 Explain the cost implications of bringing in new customers as opposed to retaining existing customers</p> <p>4.10 Identify who to refer to when considering any variation to their organisation's service offer</p>

Evidence Requirements

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2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of taking actions to meet the needs and expectations of your customer and of your organisation:
 - a without being asked by your customer
 - b at your customer's request.
6. You must include evidence that you have balanced the needs of your customers and your organisation by:
 - a making use of alternative products or services offered by the organisation
 - b varying the service you would normally offer within organisational guidelines
 - c saying 'no' to your customer and explaining the limits of your organisation's service offer.

Unit CU826 Support Customer Service Improvements

Aims

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. The learner's job involves delivering customer service. If the organisation has decided to make changes, it is the learner's job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved. This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

Level: 2

Credit value: 5

Learning outcomes <i>The learner will:</i>	Assessment criteria <i>The learner can:</i>
1. Use feedback to identify potential customer service improvements	1.1 Gather informal feedback from their customers 1.2 Use their organisation's procedures to collect feedback from their customers 1.3 Use the information from their customers to develop a better understanding of their customer service experience 1.4 Identify ways the service they give could be improved based on information they have gathered 1.5 Share their ideas for improving customer service with colleagues
2. Implement changes in customer service	2.1 Identify a possible change that could be made to improve customer service 2.2 Present their idea for improving customer service to a colleague with the appropriate authority to approve the change 2.3 Carry out changes to customer service procedures based on their own idea or proposed by their organisation 2.4 Keep their customers informed of changes to customer service

	<p>2.5 Give customers a positive impression of changes that have been made</p> <p>2.6 Work positively with others to support customer service changes</p>
<p>3. Assist with the evaluation of changes in customer service</p>	<p>3.1 Discuss with others how changes to customer service are working</p> <p>3.2 Work with others to identify any negative effects of changes and how these can be avoided</p>
<p>4. Know how to support customer service improvements</p>	<p>4.1 Explain how customer experience is influenced by the way service is delivered</p> <p>4.2 Identify how customer feedback is obtained</p> <p>4.3 Explain how to work with others to identify and support change in the way service is delivered</p> <p>4.4 Describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you have:
 - a contributed to improving customer service through your own efforts
 - b contributed to improving customer service by working with others.
5. Your evidence must cover two changes with which you have been actively involved. In each case you must be able to identify the part you played in;
 - a linking customer feedback with the reasons for the change
 - b implementing the change
 - c gathering customer reactions to the change.
6. Your evidence for each change must show how:
 - a the change has improved customer service
 - b your customers have reacted to the change.
7. Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

Unit CU827 Develop Personal Performance Through Delivering Customer Service

Aims

Delivering customer service presents many opportunities for learning and for developing personal skills. This unit is about how the learner can develop their personal skills at the same time as improving their customer service performance. The learner will need to plan together with a manager or mentor and then carry out activities which help the learner learn and develop in their customer service role. Customer service improvements rely on continuous improvement and this includes improving the learner's own skills.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Review performance in their customer service role	1.1 Work with an appropriate person to establish what they need to know, understand and be able to do to work effectively in their customer service role 1.2 Identify and review situations from their own positive and negative experiences as a customer 1.3 Carry out a self assessment of their performance in their customer service role and identify their strengths, weaknesses and development needs
2. Prepare a personal development plan and keep it up to date	2.1 Agree their strengths, weaknesses and development needs with an appropriate person 2.2 Work with an appropriate person to draw up their own development objectives to improve their performance in their customer service role 2.3 Develop a customer service personal development plan 2.4 Regularly review their progress towards their objectives with an appropriate person

<p>3. Undertake development activities and obtain feedback on their customer service performance</p>	<p>3.1 Complete development activities identified in their customer service personal development plan</p> <p>3.2 Use their day to day experiences with their customers and their own experiences as a customer to develop their customer service performance</p> <p>3.3 Obtain feedback from an appropriate person about their customer service performance</p> <p>3.4 Review and update their customer service personal development plan</p>
<p>4. Understand how to develop their personal performance through delivering customer service</p>	<p>4.1 Describe their organisation's systems and procedures for developing personal performance in customer service</p> <p>4.2 Explain how their behaviour has an effect on the behaviour of others</p> <p>4.3 Explain how effective learning depends on a process of planning, doing and reviewing</p> <p>4.4 Describe how to review effectively their personal strengths and development needs</p> <p>4.5 Describe how to put together a personal development plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service</p> <p>4.6 Explain how to access sources of information and support for their learning</p> <p>4.7 Explain how to obtain useful and constructive personal feedback from others</p> <p>4.8 Describe how to respond positively to personal feedback</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. An 'appropriate person' must be one or more of the following
 - your manager
 - your supervisor or team leader
 - a colleague detailed to help you learn
 - your assessor
 - your mentor
 - someone from your training or personnel department.
5. You must provide evidence that you have developed your personal development plan taking account of:
 - a information about the knowledge and skills relevant to your customer service role
 - b your own learning style preferences
 - c your workload
 - d opportunities for learning on the job.
6. Your personal development plan must be put on record and agreed with an appropriate person.

Unit CU828 Support Customers Using On-line Customer Services

Aims

Many organisations develop their customer service by directing customers towards on-line services. Customer service delivered on-line leaves a customer isolated and reliant on screen routes and instructions. A customer may seek help face to face or by telephone. That help will involve the learner in understanding what the customer is trying to achieve, how the system allows for that and what point they have reached in terms of finding the right route. Difficulties can arise if the system fails or if the learner's customer is unable to discover how it can deliver what they want. This unit is for the learner if one part of their job involves helping customers to find their way through on-line systems.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Establish the type and level of support their customer needs to achieve on-line customer service	1.1 Ensure that they are up-to-date and with the on-line services that their customers use 1.2 Identify what the customer is trying to achieve and what they are having difficulties with 1.3 Question their customer to discover the customer's degree of familiarity with the system 1.4 Offer their customer the option of trying the on-line approach once more 1.5 Agree with their customer the exact nature of the problem and steps that may be taken to overcome it
2. Support on-line customer service in conversation with their customer	2.1 Explore the on-line customer system in order to develop their own knowledge and skills in its use 2.2 Step through the screen sequence with their customer whilst allowing them to operate the system for themselves 2.3 Address their customer in an understanding and supportive manner 2.4 Explain to their customer why certain steps are required in the process

	<p>2.5 Offer the options to their customer of stepping them through the process or completing the transaction themselves</p> <p>2.6 Promote access to additional services or products when supporting customers on-line</p>
<p>3. Understand how to support customers using on-line services</p>	<p>3.1 Explain how their organisation's system for on-line service delivery works</p> <p>3.2 Describe the importance of close active listening to discover what their customer is trying to achieve</p> <p>3.3 Identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system</p> <p>3.4 Explain why it is generally preferable for their customer to complete a transaction for themselves</p> <p>3.5 Explain the importance of building customer confidence in using the on-line system by supporting and encouraging</p> <p>3.6 Compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves</p> <p>3.7 Identify additional services or products that may be promoted to on-line customers</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
5. You must provide evidence of supporting customers who are:
 - a new to the use of on-line services for this particular purpose
 - b familiar with the use of on-line services for this particular purpose
6. Your evidence must include examples of helping customers with difficulties caused by:
 - a the customer's use of the on-line services
 - b a system or equipment failure.

Unit CU829 Buddy a Colleague to Develop their Customer Service Skills

Aims

In customer service roles it is often useful to have a ‘buddy’ relationship with somebody who has more experience of the same customer service situation. If someone is asked to buddy a colleague who is learning customer service aspects of their job, they will need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside their colleague and providing them with constructive feedback and support. Someone does not need to be more senior than their colleague or their supervisor to act as a customer service buddy.

Level: 2

Credit value: 5

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan and prepare to buddy a colleague	1.1 Agree with their colleague aspects of the colleague’s work which may benefit most from their buddying support 1.2 Confirm their understanding of their colleague’s job tasks and responsibilities using reliable sources 1.3 Clarify the customer service image and impression their colleague should present in their job 1.4 Arrange times when it will be most helpful to work alongside their colleague 1.5 Plan details of a buddy session to support their colleague on the job
2. Support their buddy colleague on the job	2.1 Agree with their colleague where they will be placed near them when buddying them on the job 2.2 Ensure their presence when their buddy is dealing with customers does not detract from effective customer service 2.3 Carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow 2.4 Observe their colleague closely to identify what they do well and areas in which they could improve

	<p>2.5 Discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement</p> <p>2.6 Praise their colleague on aspects of work which they have carried out well</p> <p>2.7 Explain to their colleague ways in which they can improve their customer service performance</p> <p>2.8 Make notes on their colleague's strengths and areas for development that they can discuss with their colleague</p>
<p>3. Provide buddy support off the job</p>	<p>3.1 Arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers</p> <p>3.2 Identify areas of general interest that help to establish rapport with their buddy colleague</p> <p>3.3 Use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance</p> <p>3.4 Agree actions their buddy colleague can take to improve their customer service performance</p> <p>3.5 Offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience</p>
<p>4. Know how to buddy a colleague to develop their customer service skills</p>	<p>4.1 Identify the tasks in their buddy colleague's job</p> <p>4.2 Identify areas of the job that benefit most from buddying support</p> <p>4.3 Describe the customer service image and impression that should be presented in their buddy colleague's job</p> <p>4.4 Identify the best times at which to work alongside their buddy colleague</p> <p>4.5 Identify ways to work alongside their buddy colleague without intruding on the customer relationship</p> <p>4.6 Describe techniques for giving positive feedback and constructive criticism to their buddy colleague</p> <p>4.7 Explain the importance of establishing an effective rapport with their buddy colleague</p> <p>4.8 Review options for actions their buddy colleague can take to improve their customer service performance</p>

Evidence Requirements

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2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of buddying a colleague to develop their customer service skills:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

	<p>2.5 Take action resulting from their learning to change the way they deal with customers</p> <p>2.6 Share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for further options</p> <p>2.7 Record actions they take to learn more about customer service and identify those which have the most positive effects</p>
<p>3. Know how to develop their own customer service skills through self-study</p>	<p>3.1 Describe ways to locate information updating them on services and products in their information</p> <p>3.2 Identify sources of information about customer service knowledge and skills that will help them to develop</p> <p>3.3 List ways to store information that they use to develop their customer service skills</p> <p>3.4 Describe the importance of focus when self-studying to improve their customer service knowledge and skills</p> <p>3.5 Identify ways to convert information or ideas they have found through self-study into practical customer service actions</p> <p>3.6 Identify the value of discussing their learning with their line manager, their mentor or others doing a similar job</p> <p>3.7 Evaluate methods of recording actions to improve their customer service skills which have had positive effects</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have taken personal responsibility for identifying, locating and using learning materials with only limited guidance and support from your line manager, mentor or colleagues.
5. The information sources and learning materials referred to in your evidence may be any or all of the following:
 - a paper based
 - b on-line or other electronic media
 - c structured discussions.

Unit CU831 Support Customers Using Self-Service Technology

Aims

Many organisations develop their customer service by directing customers towards self-service equipment which is operated by the customer alone. Regular customers become familiar with how that equipment operates and some will feel uncomfortable about being offered further help. Others may be learning about the use of the equipment for the first time or may be experiencing particular problems. Sometimes equipment fails and authorised intervention will be needed to clear it. Whichever is the case, the learner must be able to recognise what help and intervention is needed and to provide that in a way that pleases their customer and builds their confidence in the use of the equipment. This unit is right for the learner if any part of their job involves helping and encouraging customers to operate self-service equipment in order to improve their customer experience.

Level: 2

Credit value: 5

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Identify the type of help needed by a customer using self-service technology	1.1 Prepare a standard demonstration of using the self-service equipment 1.2 Prepare to answer frequently asked questions about the operation of the self-service equipment 1.3 Identify signs of when a customer is having difficulty with the self service equipment 1.4 Choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment
2. Assist a customer using self-service technology	2.1 Maintain a professional, polite and approachable manner while they observe customers using self-help technology 2.2 Demonstrate use of the self-service equipment to a customer 2.3 Respond to a request for help from a customer using self-help equipment 2.4 Make use of staff override options to clear self-service equipment for use by customers 2.5 Talk a customer through use of the self-service equipment whilst allowing them to operate it

	<p>2.6 Invite a customer to repeat the operation of the self-service equipment if that helps them to learn</p> <p>2.7 Make positive and encouraging comments to a customer who is learning to use the self-service equipment</p> <p>2.8 Explain to their customer why certain actions and steps are needed to operate self service equipment</p> <p>2.9 Troubleshoot problems with self-service equipment and report errors and issues to appropriate people</p>
<p>3. Understand how to support customers using self-service technology</p>	<p>3.1 Explain why their organisation chooses to offer customers self-service equipment</p> <p>3.2 Explain all aspects of normal operation of the customer self-service equipment</p> <p>3.3 State frequently asked questions about operation of the self-service equipment and effective answers to those questions</p> <p>3.4 Describe techniques for giving an effective demonstration of self-service equipment</p> <p>3.5 Identify signals and signs that a customer needs help with self-service equipment</p> <p>3.6 Describe organisational procedures for using staff intervention to clear self-service equipment</p> <p>3.7 Explain the importance of building customer confidence in using self-service equipment</p> <p>3.8 Describe organisational procedures for dealing with self-service equipment problems</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The self –service technology used in your evidence may be any technology used outside the home to allow customers to interact with an organisation and help themselves. Examples include, but are not restricted to, scanning groceries, printing a boarding pass, printing photos, buying from an automated vending machine, and using an electronic kiosk to obtain information of conduct a transaction.
5. You must provide evidence of supporting customers who are:
 - a new to the use of self-service equipment for this particular purpose
 - b familiar with the use of self-service equipment for this particular purpose
6. Your evidence must include examples of helping customers with difficulties caused by:
 - a the customer’s use of the technology
 - b a system or equipment failure.

Unit CU832 Work with Others to Improve Customer Service

Aims

Teamwork is a key component of delivering and improving excellent customer service. The people the learner works with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on their skills and those of others. It involves communicating with each other and agreeing how they can work together to give a more effective service. They all need to work together positively. The learner must also monitor their own and the team's performance and change the way they do things if that improves customer service. This unit is about how the learner develops a relationship with others to improve their customer service performance.

Level: 3

Credit value: 8

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Improve customer service by working with others	1.1 Contribute constructive ideas for improving customer service 1.2 Identify what they have to do to improve customer service and confirm this with others 1.3 Agree with others what they have to do to improve customer service 1.4 Co-operate with others to improve customer service 1.5 Keep their commitments made to others 1.6 Make others aware of anything that may affect plans to improve customer service
2. Monitor their own performance when improving customer service	2.1 Discuss with others how what they do affects customer service performance 2.2 Identify how the way they work with others contributes towards improving customer service

<p>3. Monitor team performance when improving customer service</p>	<p>3.1 Discuss with others how teamwork affects customer service performance</p> <p>3.2 Work with others to collect information on team customer service performance</p> <p>3.3 Identify with others how customer service teamwork could be improved</p> <p>3.4 Take action with others to improve customer service performance</p>
<p>4. Understand how to work with others to improve customer service</p>	<p>4.1 Describe who else is involved either directly or indirectly in the delivery of customer service</p> <p>4.2 Describe the roles and responsibilities of others in their organisation</p> <p>4.3 Describe the roles of others outside their organisation who have an impact on their services or products</p> <p>4.4 Evaluate what the goals or targets of their organisation are in relation to customer service and how these are set</p> <p>4.5 Evaluate how their organisation identifies improvements in customer service</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of agreeing customer service roles and responsibilities which are:
 - a part of your own role
 - b part of other people's roles.
5. You must provide evidence that you have worked with two of these groups of people:
 - a team members or colleagues
 - b suppliers or service partners
 - c supervisors, team leaders or managers.
6. Your evidence must show that your work with others involves communication by two of these methods as expected within your job role:
 - a face to face
 - b in writing
 - c by telephone
 - d using text messages
 - e by e-mail
 - f using the internet (including social networking)
 - g using an intranet.

Unit CU833 Promote Continuous Improvement

Aims

This unit covers the key competence of the customer service professional. The learner must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. The learner will need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan improvements in customer service based on customer feedback	1.1 Gather feedback from customers that will help to identify opportunities for customer service improvement 1.2 Analyse and interpret feedback to identify opportunities for customer service improvements and propose changes 1.3 Discuss with others the potential effects of any proposed changes for their customers and their organisation 1.4 Negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change
2. Implement changes in customer service	2.1 Organise the implementation of authorised changes 2.2 Implement the changes following organisational guidelines 2.3 Inform people inside and outside their organisation who need to know of the changes being made and the reasons for them 2.4 Monitor early reactions to changes and make appropriate fine-tuning adjustments

<p>3. Review changes to promote continuous improvement</p>	<p>3.1 Collect and record feedback on the effects of changes</p> <p>3.2 Analyse and interpret feedback and share their findings on the effects of changes with others</p> <p>3.3 Summarise the advantages and disadvantages of the changes</p> <p>3.4 Use their analysis and interpretation of changes to identify opportunities for further improvement</p> <p>3.5 Present these opportunities to somebody with sufficient authority to make them happen</p>
<p>4. Understand how to promote continuous improvement</p>	<p>4.1 Review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements</p> <p>4.2 Explain how customer experience is influenced by the way service is delivered</p> <p>4.3 Explain how to collect, analyse and present customer feedback</p> <p>4.4 Explain how to make a business case to others to bring about change in the products or services they offer</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you have organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.
5. You must show that your proposals for improvements:
 - a are based on planned and analysed customer feedback
 - b take into account all relevant regulations
 - c take into account the costs and benefits to the organisation.
6. You may carry out this work alone or with colleagues. However, you must provide evidence that you have taken an active role in:
 - a collecting and analysing feedback
 - b proposing initiatives for change
 - c implementing the change
 - d evaluating and reviewing the change.
7. Your evidence must clearly show the part you have played in each step of the continuous improvement process.
8. The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.

Unit CU834 Develop your Own and Others' Customer Service Skills

Aims

This unit is about taking responsibility for continuously developing the learner's own customer service skills and passing those skills on to others. It is about helping themselves and others to learn and grow in their customer service roles. The learner may not be a manager or a supervisor but they may be responsible for showing others how things work and what they need to do. For example, a new member of staff may need an introduction to the products, services, systems or procedures of their organisation and the learner may be asked to show them. Or the learner may need to coach someone from another department who has been transferred. Also, there may be the introduction of a new product, service, system or procedure that the learner is asked to learn about and present or demonstrate to others. This unit will help the learner to put 'showing others' into a formal framework that will help them to learn and improve their own coaching skills. The delivery of excellent customer service depends on the learner's skills and the skills of those around them.

Level: 3

Credit value: 8

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Develop their own customer service skills	1.1 Agree with a manager or mentor the specific customer service skills they need in their customer service role 1.2 Agree the actions they need to take to improve their customer service skills 1.3 Draw up a personal development plan based on their agreed actions to improve their customer service skills 1.4 Carry out their personal development activities and review their progress 1.5 Obtain feedback from their manager or mentor about their customer service performance and update their personal development plan
2. Plan the coaching of others in customer service	2.1 Identify and agree with colleagues specific customer service skills and knowledge those colleagues need in their customer service role 2.2 Identify opportunities for colleagues to take actions to develop their customer service skills

	<p>2.3 Plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills</p>
<p>3. Coach others in customer service</p>	<p>3.1 Coach colleagues to develop specific and agreed customer service skills</p> <p>3.2 Give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence</p> <p>3.3 Regularly check the progress of colleagues and modify their coaching as appropriate</p> <p>3.4 Give regular feedback to colleagues about the progress they are making</p> <p>3.5 Explain clearly to colleagues how ongoing support will be provided</p>
<p>4. Understand how to develop their own and others' customer service skills</p>	<p>4.1 Describe organisational systems and procedures for developing their own and others' personal performance in customer service</p> <p>4.2 Explain how their behaviour impacts on others</p> <p>4.3 Explain how to review effectively their personal strengths and development needs</p> <p>4.4 Describe how to put together a personal development plan for themselves or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service</p> <p>4.5 Explain how to obtain useful and constructive personal feedback from others</p> <p>4.6 Describe how to respond positively to personal feedback</p> <p>4.7 Describe how to put together a coaching plan that will build on their strengths and overcome their weaknesses in areas that are important to customer service and their job role</p> <p>4.8 Explain how to give useful and constructive personal feedback to others</p> <p>4.9 Describe how to help others to respond positively to personal feedback</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your personal development plan may be based on existing customer service skills and development activities that already take place in your organisation or new activities that you have to devise.
5. You must have constructed your personal development plan taking account of information about the knowledge and skills relevant to your:
 - a customer service role
 - b own preferred method of learning
 - c workload
 - d opportunities for learning on the job
 - e opportunities for learning off the job.
6. An 'appropriate person' must be one or more of the following:
 - a your manager
 - b your supervisor or team leader
 - c a colleague detailed to help you learn
 - d your assessor
 - e your mentor
 - f someone from your training or personnel department.
7. Feedback about your customer service performance must involve your line manager or supervisor and your evidence must show this.
8. Your evidence of coaching may relate either to a single colleague or several colleagues who may be:
 - a new to the organisation or department
 - b new to the job, procedure or system
 - c experienced but seeking to refresh or improve their customer service skills.

Unit CU835 Lead a Team to Improve Customer Service

Aims

If the learner is responsible for leading a team delivering customer service, they need to plan and organise the team's work and support team members as they develop their performance. This unit is about looking at both the learner's organisation and their staffing resources and bringing these together in a constructive way to improve overall customer service. The learner will need to give support and guidance to their team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with their colleagues and staff team. It is about leading by example.

Level: 3

Credit value: 7

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Plan and organise the work of a team	1.1 Treat team members with respect at all times 1.2 Agree with team members their role in delivering effective customer service 1.3 Involve team members in planning and organising their customer service work 1.4 Allocate work which takes full account of team members' customer service skills and the objectives of the organisation 1.5 Motivate team members to work together to raise their customer service performance
2. Provide support for team members	2.1 Check that team members understand what they have to do to improve their work with customers and why that is important 2.2 Check with team members what support they feel they may need throughout this process 2.3 Provide team members with support and direction when they need help 2.4 Encourage team members to work together to improve customer service

<p>3. Review performance of team members</p>	<p>3.1 Provide sensitive feedback to team members about their customer service performance</p> <p>3.2 Encourage team members to discuss their customer service performance</p> <p>3.3 Discuss sensitively with team members action they need to take to continue to improve their customer service performance</p>
<p>4. Understand how to lead a team to improve customer service</p>	<p>4.1 Describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation</p> <p>4.2 Explain how team and individual performance can affect the achievement of organisational objectives</p> <p>4.3 Explain the implications of failure to improve customer service for their team members and their organisation</p> <p>4.4 Describe how to plan work activities</p> <p>4.5 Explain how to present plans to others to gain understanding and commitment</p> <p>4.6 Explain how to facilitate meetings to encourage frank and open discussion</p> <p>4.7 Explain how to involve and motivate staff to encourage teamwork</p> <p>4.8 Describe how to recognise and deal sensitively with issues of underperformance</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence you have line management or supervisory responsibility for the team members used in your evidence.
5. You must show that you have taken into account the organisational constraints of:
 - a time
 - b human resources
 - c physical resources
 - d financial resources.
6. You must also show that you have taken into account the team or individual constraints of:
 - a existing workloads
 - b individual capabilities and sensitivities
 - c initiatives and objectives currently being undertaken by the organisation
 - d influences operating on the team from outside.
7. Your evidence must provide evidence that you have taken time with each team member to:
 - a plan and organise their work
 - b provide support and guidance
 - c give and seek feedback on performance.
8. The feedback you provide to team members may be
 - a formal or informal
 - b verbal or in writing.

Unit CU836 Gather, Analyse and Interpret Customer Feedback

Aims

Customer service can be improved only if the learner is fully aware of customer wishes and expectations. The learner can discover much of this information by seeking structured feedback from their customers about the customer’s experiences of the learner’s services or products. When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is about how the learner collects that feedback and prepares it for use in the improvement of customer service

Level: 3

Credit value: 10

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan to gather customer feedback	1.1 Identify the options available for collecting customer service feedback 1.2 Evaluate the costs and benefits of each option for collecting customer feedback 1.3 Select one or more methods for collecting customer feedback 1.4 Plan in detail what information they will collect from customers 1.5 Ensure the information they collect all has a customer service focus 1.6 Plan in detail how they will collect information from customers using their chosen method
2. Gather customer feedback	2.1 Use their chosen method and detailed plan to collect customer feedback 2.2 Monitor the collection of customer feedback to ensure it is falling within their chosen sampling frame 2.3 Monitor the collection of customer feedback to ensure it focuses on customer service issues 2.4 Record the data they collect in a way that makes analysis and interpretation easy 2.5 Respect their customers' rights to confidentiality if the customers do not want their comments to be identified

<p>3. Analyse and interpret customer feedback</p>	<p>3.1 Collate data collected from customers in order to identify patterns and trends in customer service</p> <p>3.2 Perform appropriate calculations to summarise patterns and trends in the data</p> <p>3.3 Present their analysis in a form that is easily understood</p> <p>3.4 Link their analysis with their knowledge of their organisation's service offer and customer service processes in order to interpret the meaning of the data</p> <p>3.5 Make recommendations for changes in their organisation's service offer or customer service processes in response to the views of their customers</p> <p>3.6 Identify ways in which customer feedback can be used to inform customers and develop the customer relationship</p>
<p>4. Understand how to gather, analyse and interpret customer feedback</p>	<p>4.1 Explain random sampling techniques and how to evaluate bias in non-random samples</p> <p>4.2 Identify principles of questionnaire design</p> <p>4.3 Identify principles of effective interviewing</p> <p>4.4 Explain how to calculate the cost of a customer survey</p> <p>4.5 Describe techniques for monitoring data collection</p> <p>4.6 Explain how to use appropriate software to record and analyse customer feedback</p> <p>4.7 Describe methods of displaying and presenting data in a way that is easy to understand</p> <p>4.8 Explain statistical techniques for summarising trends and patterns</p> <p>4.9 Describe organisational procedures for recommending changes in the service offer or customer service procedures</p> <p>4.10 Compare the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail</p>

Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have collected feedback from customers:
 - a using informal methods such as conversation and observation of customer reactions
 - b using two different formal methods such as questionnaire, telephone or interview surveys.
5. Your evidence must include feedback that you have collected:
 - a using a method you have devised
 - b following established organisational procedures.
6. You must provide evidence that you have displayed the results of your data collection:
 - a in tabulated form
 - b in graphical or pictorial form.

Unit CU837 Monitor the Quality of Customer Service Transactions

Aims

The quality of customer service transactions must be monitored if they are to benefit from actions to improve that overall quality. Quality in this area can be defined only in terms of agreed criteria and against agreed performance ratings. In an organisation that carries out a high volume of customer service transactions delivered face-to-face, by telephone or on-line, quality can be measured and improved only by adopting a systematic sampling approach. Spot checks and routine checks are needed to observe individual performance and results must be analysed to identify patterns and trends. Improvement can then occur as a result of feedback the learner gives to colleagues so that actions to improve individual performance can be taken. This unit is for the learner if one of their job responsibilities involves systematically sampling the quality of customer service transactions and working with colleagues to improve their performance.

Level: 3

Credit value: 7

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Prepare to monitor the quality of customer service transactions	1.1 Identify the criteria against which quality of customer service transactions will be monitored 1.2 Agree a sampling frame for monitoring customer service transactions 1.3 Follow organisational procedures to ensure their monitoring plans are compliant with any need for staff and customers to know they are being observed 1.4 Identify ratings and scales against which quality of customer service transactions can be measured 1.5 Ensure that they are totally familiar with the customer service procedures for transactions they are monitoring
2. Monitor the quality of customer service transactions	2.1 Carry out spot checks on or observations of the quality of customer service transactions 2.2 Carry out planned and routine checks on or observations of the quality of customer service transactions 2.3 Observe or listen to a colleague dealing with a customer service transaction

	<p>2.4 Record their observations of a colleague's performance against agreed quality criteria</p> <p>2.5 Make judgements about their colleague's quality of service delivery by allocating a performance rating against a defined and agreed rating scale</p> <p>2.6 Analyse and summarise their observations to identify patterns and trends in their colleague's performance</p>
<p>3. Give feedback on the quality of customer service transactions</p>	<p>3.1 Engage with their colleague in preparation for giving feedback on the quality of their customer service delivery</p> <p>3.2 Provide positive feedback to their colleague by identifying features of customer service that they delivered particularly well</p> <p>3.3 Give feedback to their colleague regarding features of their customer service delivery that would benefit from development</p> <p>3.4 Propose actions for coaching or training of a colleague in areas that would improve their customer service delivery</p> <p>3.5 Maintain records of customer service quality monitoring and action plans for improvements</p>
<p>4. Understand how to monitor the quality of customer service transactions</p>	<p>4.1 Review the criteria against which the quality of customer service delivery is judged in their organisation</p> <p>4.2 Describe ways to construct a representative sample of customer service transactions in order to monitor quality</p> <p>4.3 Explain the importance of compliance with guidelines about ensuring customers and colleagues know they are being observed to monitor quality of service</p> <p>4.4 Explain how to define ratings and scales against which customer service transactions can be judged</p> <p>4.5 Explain their organisation's procedures and guidelines for customer service delivery</p> <p>4.6 Describe ways to record details of customer service transactions they have observed in order to provide feedback</p> <p>4.7 Describe techniques for analysing and summarising observations in order to identify patterns and trends in customer service delivery</p>

	<p>4.8 Explain the importance of providing positive feedback to a colleague prior to identifying areas for improvement</p> <p>4.9 Describe sources of information about coaching and training options to improve customer service delivery</p> <p>4.10 Explain the importance of keeping detailed records of coaching and training relating to customer service delivery</p>
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Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

There are no additional evidence requirements other than those expressed within the Unit.

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