

Customer Service Practitioner Apprenticeship Standard

NCFE Level 2 Diploma in Customer Service (601/3973/0)

| Knowledge | | Unit and assessment criteria |
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| Knowing your customers | <ul style="list-style-type: none"> Understand who customers are. | No mapping |
| | <ul style="list-style-type: none"> Understand the difference between internal and external customers. | <p>Unit 2 Understand Customers 1.1 Explain the distinctions between internal and external customers</p> <p>Unit 17 Develop customer relationships 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships</p> |
| | <ul style="list-style-type: none"> Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective. | <p>Unit 1 Deliver Customer Service 1.1 Explain the relationship between customers' needs and expectations and customer satisfaction 1.3 Explain the importance of treating customers as individuals 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation 1.6 Describe methods of measuring their own effectiveness in the delivery of customer service</p> <p>Unit 2 Understand Customers 1.2 Explain how cultural factors can affect customers' expectations</p> |

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| | | <p>Unit 3 Principles of Customer Service 2.3 Explain how ethical considerations affect customer service 3.1 Explain the difference between customers' wants, needs and their expectations 3.2 Explain how to identify customers' needs and expectations 3.3 Explain the importance of managing customers' expectations 3.4 Explain how to behave in a way that meets customers' expectations 3.5 Describe techniques that can be used to put customers at ease and gain their trust 3.6 Explain the importance of following up actions and keeping promises when delivering customer service</p> <p>Unit 07 Communicate with customers in writing 1.1 Explain why it is necessary to use different forms of written communication for different purposes</p> <p>Unit 15 Resolve customer service problems 1.2 Describe techniques to identify customer service problems and their causes 1.3 Describe techniques to deal with situations where customers become agitated or angry</p> <p>Unit 16 Deliver customer service to challenging customers 1.1 Describe different types of challenging customers in the customer service environment 1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers</p> <p>Unit 17 Develop customer relationships 1.1 Describe the importance of developing relationships with customers</p> |
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| | | <p>1.3 Explain how customers' expectations may change over time</p> <p>1.7 Explain the importance of regular communication in the development of both internal and external customer relationships</p> |
| Understanding the organisation | <ul style="list-style-type: none"> Know the purpose of the business and what 'brand promise' means. | <p>Unit 1 Deliver Customer Service</p> <p>2.1 Explain the importance of a brand to an organisation</p> <p>2.2 Explain how a brand affects an organisation's customer service offer</p> <p>2.3 Explain the importance of using customer service language that supports a brand promise</p> <p>2.4 Identify their own role in ensuring that a brand promise is delivered</p> |
| | <ul style="list-style-type: none"> Know your organisation's core values and how they link to the service culture. | No mapping |
| | <ul style="list-style-type: none"> Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation. | <p>Unit 15 Resolve customer service problems</p> <p>1.1 Describe an organisation's customer service and complaints procedures</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers</p> <p>1.6 Explain their own levels of authority for agreeing actions outside the service offer</p> <p>Unit 25 Health and Safety procedures in the workplace</p> <p>1.1 Define the main responsibilities for health and safety in the workplace of the following:</p> <ul style="list-style-type: none"> employers employees <p>1.2 Describe two health and safety laws affecting the workplace</p> |

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| <p>Meeting regulations and legislation</p> | <ul style="list-style-type: none"> Know the appropriate legislation and regulatory requirements that affect your business. | <p>Unit 3 Principles of Customer Service 2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service 2.2 Describe how health, safety and environmental legislation affects customer service delivery 2.3 Explain how ethical considerations affect customer service 2.4 Explain how equality legislation affects customer service 2.5 Describe how legislation affects the use and storage of customer information</p> <p>Unit 7 Communicate with customers in writing 1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing</p> <p>Unit 12 Exceed customer expectations 1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer</p> <p>Unit 25 Health and Safety procedures in the workplace 1.1 Define the main responsibilities for health and safety in the workplace of the following: <ul style="list-style-type: none"> employers employees 1.2 Describe two health and safety laws affecting the workplace</p> <p>Unit 32 Principles of equality and diversity in the workplace 1.2 Describe the legal requirements for equality of opportunity 1.3 Describe the role and powers of organisations responsible for equality 1.4 Explain the benefits of equal opportunities and diversity 1.5 Explain the potential consequences for an organisation</p> |
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| | | of failing to comply with equality legislation |
| | <ul style="list-style-type: none"> Know your responsibility in relation to this and how to apply it when delivering service. | <p>Unit 12 Exceed customer expectations 1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer</p> <p>Unit 25 Health and Safety procedures in the workplace 1.3 Define the importance of following health and safety procedures in the workplace 1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace</p> <p>Unit 32 Principles of equality and diversity in the workplace 2.1 Explain how organisational policies on equality and diversity translate into day-to-day activity in the workplace 2.2 Describe their own responsibilities for equality and diversity in the workplace 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace</p> |
| Systems and resources | <ul style="list-style-type: none"> Know how to use systems, equipment and technology to meet the needs of your customers. | <p>Unit 15 Resolve customer service problems 1.1 Describe an organisation's customer service and complaints procedures 1.6 Describe methods used to encourage customers to provide feedback</p> |
| | <ul style="list-style-type: none"> Understand types of measurement and evaluation tools available to monitor customer service levels. | <p>Unit 15 Resolve customer service problems 1.1 Describe an organisation's customer service and complaints procedures 1.5 Explain the purpose of encouraging customers to provide feedback 1.6 Describe methods used to encourage customers to provide feedback</p> |

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| | | <p>Unit 17 Develop customer relationships 1.4 Explain the use of customer feedback as a means of developing customer relationships</p> |
| Your role and responsibility | <ul style="list-style-type: none"> Understand your role and responsibility within your organisation and the impact of your actions on others. | <p>Unit 5 Manage personal performance and development 1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager</p> <p>Unit 16 Deliver customer service to challenging customers 1.6 Explain their own levels of authority for agreeing actions outside the service offer</p> <p>Unit 17 Develop customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers</p> <p>Unit 31 Develop working relationships with colleagues 1.1 Outline the benefits of effective team working 1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5 Explain the importance of warning colleagues of problems and changes that may affect them</p> |
| | <ul style="list-style-type: none"> Know the targets and goals you need to deliver against. | <p>Unit 5 Manage personal performance and development 1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 Agree criteria for measuring progress and achievement with line manager</p> |
| Customer experience | <ul style="list-style-type: none"> Understand how establishing the facts enable you to create a customer focused experience and appropriate response. | <p>Unit 3 Principles of Customer Service 3.1 Explain the difference between customers' wants, needs and their expectations 3.2 Explain how to identify customers' needs and</p> |

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| | | <p>expectations 3.6 Explain the importance of following up actions and keeping promises when delivering customer service</p> <p>Unit 6 Communicate verbally with customers 1.1 Explain the importance of effective communication in customer service 1.3 Explain why 'customer service language' is used 1.4 Describe different questioning techniques that can be used when communicating with customers 1.5 Describe verbal and non-verbal signals that show how a customer may be feeling 1.6 Describe the types of information needed when communicating verbally with customers</p> <p>Unit 15 Resolve customer service problems 1.2 Describe techniques to identify customer service problems and their causes 1.5 Explain the purpose of encouraging customers to provide feedback</p> |
| | <p>Understand how to build trust with a customer and why this is important</p> | <p>Unit 2 Understand Customers 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty</p> <p>Unit 3 Principles of Customer Service 3.3 Explain the importance of managing customers' expectations 3.4 Explain how to behave in a way that meets customers' expectations 3.5 Describe techniques that can be used to put customers at ease and gain their trust 3.6 Explain the importance of following up actions and keeping promises when delivering customer service</p> |

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| | | <p>Unit 17 Develop customer relationships</p> <p>1.1 Describe the importance of developing relationships with customers</p> <p>1.2 Explain the value of customer loyalty and retention</p> <p>1.3 Explain the use of customer feedback as a means of developing customer relationships</p> <p>1.7 Explain the importance of regular communication in the development of both internal and external customer relationships</p> |
| Product and service knowledge | Understand the products or services that are available from your organisation and keep up-to-date | <p>Unit 1 Deliver Customer Service</p> <p>3.1 Keep up to date with an organisation's products and/or services</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>2.3 Explain to customers the limits of the service they can offer</p> <p>2.4 Explain to customers the reasons for an organisation's position and policy</p> <p>2.5 Agree a way forward that balances customer satisfaction and organisational needs</p> |

| Skills | | Unit and assessment criteria |
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| Interpersonal skills | Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery. | <p>Unit 1 Deliver Customer Service</p> <p>4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>4.2 Adapt their own behaviour to meet customers' needs or expectations</p> <p>4.3 Respond to customers' requests in line with organisational guidelines</p> <p>4.4 Inform customers of the progress of their requests</p> <p>4.5 Confirm that customers' expectations have been met in line with the service offer</p> <p>Unit 6 Communicate verbally with customers</p> |

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| | | <p>2.2 Listen 'actively' to what customers are saying</p> <p>2.3 Communicate clearly, concisely and professionally with customers</p> <p>2.4 Use a tone of voice and expression that reinforces messages when communicating with customers</p> <p>2.5 Use language that reinforces empathy with customers</p> <p>2.6 Adapt their response in accordance with customers' changing behaviour</p> <p>2.9 Check that customers have understood what has been communicated</p> <p>Unit 8 Deal with incoming telephone calls from customers</p> <p>2.1 Verify the identity of callers in line with organisational guidelines</p> <p>2.2 Speak clearly, concisely and politely using speech and tone to create a rapport</p> <p>2.3 Adapt their own communication style to meet customers' needs</p> <p>2.4 Listen actively to what customers are saying to collect as much information as possible</p> <p>2.5 Use questioning techniques that are appropriate to the conversation</p> <p>3.1 Respond in a way that best meets customer and organisational requirements</p> <p>3.2 Give clear and concise information that meets customers' needs</p> <p>3.4 Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>3.5 Complete agreed post-call follow-up actions</p> <p>Unit 12 Exceed customer expectations</p> <p>2.1 Identify differences between customers' expectations and needs and the service offer</p> <p>2.2 Explain the service offer clearly and concisely to customers</p> <p>2.3 Identify options that offer added value without affecting</p> |
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| | | <p>other customers adversely</p> <p>2.4 Make offers to customers within their own authority levels</p> <p>2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer</p> <p>Unit 15 Resolve customer service problems</p> <p>2.3 Use the most appropriate method of communication for dealing with customers</p> <p>2.4 Agree with customers the option that best meets their needs and those of the organisation</p> <p>2.5 Keep customers informed of progress</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>2.1 Identify the signs that indicate that a customer is challenging</p> <p>2.2 Express understanding of customers' point of view without admitting liability</p> <p>2.3 Explain to customers the limits of the service they can offer</p> <p>2.4 Explain to customers the reasons for an organisation's position and policy</p> <p>2.5 Agree a way forward that balances customer satisfaction and organisational needs</p> <p>Unit 17 Develop customer relationships</p> <p>2.1 Give help and information that meets or exceeds customers' expectations</p> <p>2.2 Identify new ways of helping customers based on their feedback</p> <p>2.4 Identify added value that the organisation could offer customers</p> <p>2.5 Bring to customers' attention products or services that may interest them</p> |
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| <p>Communication</p> | <ul style="list-style-type: none"> • Depending on your job role and work environment: - Use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or - Use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. | <p>Unit 6 Communicate verbally with customers</p> <p>2.1 Identify customers' wants and priorities 2.2 Listen 'actively' to what customers are saying 2.3 Communicate clearly, concisely and professionally with customers 2.4 Use a tone of voice and expression that reinforces messages when communicating with customers 2.5 Use language that reinforces empathy with customers 2.6 Adapt their response in accordance with customers' changing behaviour 2.7 Provide information and advice that meets customers' needs 2.9 Check that customers have understood what has been communicated</p> <p>Unit 7 Communicate with customers in writing</p> <p>3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs 3.3 Record decisions and actions taken and the reasons for them 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing</p> <p>Unit 8 Deal with incoming telephone calls from customers</p> <p>2.2 Speak clearly, concisely and politely using speech and tone to create a rapport 2.3 Adapt their own communication style to meet customers' needs 2.4 Listen actively to what customers are saying to collect as much information as possible 2.5 Use questioning techniques that are appropriate to the conversation</p> |
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| | | <p>2.6 Record information in line with organisational guidelines</p> <p>3.1 Respond in a way that best meets customer and organisational requirements</p> <p>3.2 Give clear and concise information that meets customers' needs</p> <p>3.4 Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>3.5 Complete agreed post-call follow-up actions</p> <p>Unit 12 Exceed customer expectations</p> <p>2.2 Explain the service offer clearly and concisely to customers</p> <p>2.6 Record agreements made and actions taken</p> <p>Unit 15 Resolve customer service problems</p> <p>2.3 Use the most appropriate method of communication for dealing with customers</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>2.2 Express understanding of customers' point of view without admitting liability</p> <p>2.3 Explain to customers the limits of the service they can offer</p> <p>2.4 Explain to customers the reasons for an organisation's position and policy</p> <p>2.5 Agree a way forward that balances customer satisfaction and organisational needs</p> <p>Unit 17 Develop customer relationships</p> <p>2.1 Give help and information that meets or exceeds customers' expectations</p> <p>2.2 Identify new ways of helping customers based on their feedback</p> <p>2.4 Identify added value that the organisation could offer customers</p> <p>2.5 Bring to customers' attention products or services that</p> |
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| | | may interest them |
| | <ul style="list-style-type: none"> Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand. | <p>Unit 6 Communicate verbally with customers 2.8 Maintain organisational standards of behaviour and communication when interacting with customers 2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers</p> <p>Unit 7 Communicate with customers in writing 2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer 3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing</p> <p>Unit 12 Exceed customer expectations 2.2 Explain the service offer clearly and concisely to customers</p> <p>Unit 15 Resolve customer service problems 2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems</p> |
| Influencing skills | Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation. | <p>Unit 6 Communicate verbally with customers 2.1 Identify customers' wants and priorities 2.3 Communicate clearly, concisely and professionally with customers 2.7 Provide information and advice that meets customers' needs</p> <p>Unit 7 Communicate with customers in writing 2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer</p> |

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| | | <p>3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone</p> <p>3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>Unit 8 Deal with incoming telephone calls from customers</p> <p>3.1 Respond in a way that best meets customer and organisational requirements</p> <p>3.2 Give clear and concise information that meets customers' needs</p> <p>3.4 Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>Unit 12 Exceed customer expectations</p> <p>2.2 Explain the service offer clearly and concisely to customers</p> <p>2.3 Identify options that offer added value without affecting other customers adversely</p> <p>2.4 Make offers to customers within their own authority levels</p> <p>2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer</p> <p>Unit 15 Resolve customer service problems</p> <p>2.2 Identify workable options for resolving problems within organisational guidelines</p> <p>2.3 Use the most appropriate method of communication for dealing with customers</p> <p>2.4 Agree with customers the option that best meets their needs and those of the organisation</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>2.3 Explain to customers the limits of the service they can</p> |
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| | | <p>offer</p> <p>2.4 Explain to customers the reasons for an organisation's position and policy</p> <p>2.5 Agree a way forward that balances customer satisfaction and organisational needs</p> <p>Unit 17 Develop customer relationships</p> <p>2.1 Give help and information that meets or exceeds customers' expectations</p> <p>2.2 Identify new ways of helping customers based on their feedback</p> <p>2.4 Identify added value that the organisation could offer customers</p> <p>2.5 Bring to customers' attention products or services that may interest them</p> |
| Personal organisation | Be able to organise yourself, prioritise your own workload/activity and work to meet deadlines. | <p>Unit 5 Manage personal performance and development</p> <p>1.3 Complete tasks to agreed timescales and quality standards</p> <p>2.1 Plan and manage workloads and priorities using time management tools and techniques</p> <p>2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives</p> <p>Unit 31 Develop working relationships with colleagues</p> <p>2.3 Fulfil agreements made with colleagues</p> <p>3.4 Resolve problems within their own level of authority and agreed contribution</p> |
| Dealing with customer conflict and challenge | <ul style="list-style-type: none"> • Demonstrate patience and calmness. | <p>Unit 6 Communicate verbally with customers</p> <p>2.2 Listen 'actively' to what customers are saying</p> <p>2.3 Communicate clearly, concisely and professionally with customers</p> <p>2.4 Use a tone of voice and expression that reinforces messages when communicating with customers</p> <p>2.6 Adapt their response in accordance with customers'</p> |

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| | | <p>changing behaviour 2.8 Maintain organisational standards of behaviour and communication when interacting with customers</p> <p>Unit 8 Deal with incoming telephone calls from customers 2.2 Speak clearly, concisely and politely using speech and tone to create a rapport 2.3 Adapt their own communication style to meet customers' needs</p> <p>Unit 15 Resolve customer service problems 2.3 Use the most appropriate method of communication for dealing with customers</p> |
| | <ul style="list-style-type: none"> • Show you understand the customer's point of view. | <p>Unit 6 Communicate verbally with customers 2.2 Listen 'actively' to what customers are saying 2.4 Use a tone of voice and expression that reinforces messages when communicating with customers 2.5 Use language that reinforces empathy with customers 2.6 Adapt their response in accordance with customers' changing behaviour 2.8 Maintain organisational standards of behaviour and communication when interacting with customers 2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers</p> <p>Unit 7 Communicate with customers in writing 3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone</p> <p>Unit 8 Deal with incoming telephone calls from customers 2.4 Listen actively to what customers are saying to collect as much information as possible</p> |

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| | | <p>2.5 Use questioning techniques that are appropriate to the conversation</p> <p>Unit 15 Resolve customer service problems</p> <p>2.1 Identify the nature and cause of customer service problems</p> <p>2.2 Identify workable options for resolving problems within organisational guidelines</p> <p>2.3 Use the most appropriate method of communication for dealing with customers</p> <p>2.4 Agree with customers the option that best meets their needs and those of the organisation</p> <p>2.5 Keep customers informed of progress</p> <p>Unit 16 Deliver customer service to challenging customers</p> <p>2.2 Express understanding of customers' point of view without admitting liability</p> <p>Unit 17 Develop customer relationships</p> <p>2.2 Identify new ways of helping customers based on their feedback</p> <p>2.4 Identify added value that the organisation could offer customers</p> <p>2.5 Bring to customers' attention products or services that may interest them</p> |
| | <ul style="list-style-type: none"> • Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations. | <p>Unit 6 Communicate verbally with customers</p> <p>2.4 Use a tone of voice and expression that reinforces messages when communicating with customers</p> <p>2.6 Adapt their response in accordance with customers' changing behaviour</p> <p>2.7 Provide information and advice that meets customers' needs</p> <p>2.9 Check that customers have understood what has been communicated</p> <p>2.10 Adhere to organisational policies and procedures, legal</p> |

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| | | <p>and ethical requirements when communicating verbally with customers</p> <p>Unit 7 Communicate with customers in writing 3.2 Use language that is clear and concise, adapting it to meet identified customer needs 3.3 Record decisions and actions taken and the reasons for them</p> <p>Unit 8 Deal with incoming telephone calls from customers 3.1 Respond in a way that best meets customer and organisational requirements 3.2 Give clear and concise information that meets customers' needs 3.4 Confirm that the customer is satisfied with the outcomes of the conversation 3.5 Complete agreed post-call follow-up actions</p> <p>Unit 15 Resolve customer service problems 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process 3.1 Explain to customers the reasons why problems cannot be resolved 3.2 Refer customers to other sources of help if their problems cannot be resolved</p> <p>Unit 16 Deliver customer service to challenging customers 2.3 Explain to customers the limits of the service they can offer 2.4 Explain to customers the reasons for an organisation's position and policy 2.5 Agree a way forward that balances customer satisfaction and organisational needs 2.6 Obtain help from colleagues when options for action are</p> |
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| | | <p>beyond their level of authority</p> <p>Unit 17 Develop customer relationships</p> <p>2.1 Give help and information that meets or exceeds customers' expectations</p> <p>2.2 Identify new ways of helping customers based on their feedback</p> <p>2.4 Identify added value that the organisation could offer customers</p> <p>2.5 Bring to customers' attention products or services that may interest them</p> |
| | <ul style="list-style-type: none"> Maintain informative communication during service recovery. | <p>Unit 6 Communicate verbally with customers</p> <p>2.1 Identify customers' wants and priorities</p> <p>2.3 Communicate clearly, concisely and professionally with customers</p> <p>2.6 Adapt their response in accordance with customers' changing behaviour</p> <p>2.7 Provide information and advice that meets customers' needs</p> <p>2.9 Check that customers have understood what has been communicated</p> <p>Unit 7 Communicate with customers in writing</p> <p>2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer</p> <p>3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone</p> <p>3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>3.3 Record decisions and actions taken and the reasons for them</p> <p>3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing</p> |

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| | | <p>Unit 8 Deal with incoming telephone calls from customers 3.2 Give clear and concise information that meets customers' needs 3.4 Confirm that the customer is satisfied with the outcomes of the conversation 3.5 Complete agreed post-call follow-up actions</p> <p>Unit 15 Resolve customer service problems 2.3 Use the most appropriate method of communication for dealing with customers 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process</p> <p>Unit 16 Deliver customer service to challenging customers 2.2 Express understanding of customers' point of view without admitting liability 2.3 Explain to customers the limits of the service they can offer 2.4 Explain to customers the reasons for an organisation's position and policy 2.5 Agree a way forward that balances customer satisfaction and organisational needs 2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers</p> <p>Unit 17 Develop customer relationships 2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback 2.4 Identify added value that the organisation could offer customers 2.5 Bring to customers' attention products or services that</p> |
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| Behaviours | | Unit and assessment criteria |
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| Developing self | <ul style="list-style-type: none"> Take ownership for keeping your service knowledge and skills up-to-date. | <p>Unit 5 Manage personal performance and development 4.2 Make use of formal development opportunities that are consistent with business needs 4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>Unit 31 Develop working relationships with colleagues 3.1 Take others' viewpoints into account when making decisions</p> |
| | <ul style="list-style-type: none"> Consider personal goals and propose development that would help achieve them. | <p>Unit 5 Manage personal performance and development 3.1 Identify organisational policies relating to personal development 3.4 Identify their own preferred learning style(s) 3.5 Identify their own development needs from analyses of the role, personal and team objectives 3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs 4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms 4.2 Make use of formal development opportunities that are consistent with business needs 4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives 4.4 Review progress against agreed objectives and amend plans accordingly</p> |
| Being open to feedback | Act on and seek feedback from others to develop or maintain personal service skills and knowledge. | <p>Unit 5 Manage personal performance and development 3.2 Explain the need to maintain a positive attitude to feedback on performance 3.6 Use feedback from others to identify their own</p> |

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| | | <p>development needs</p> <p>Unit 31 Develop working relationships with colleagues 3.1 Take others' viewpoints into account when making decisions</p> |
| Team working | <ul style="list-style-type: none"> Frequently and consistently communicate and work with others in the interest of helping customers efficiently. | <p>Unit 1 Deliver Customer Service 5.1 Identify ways that customer service could be improved for an organisation and individuals</p> <p>Unit 15 Resolve customer service problems 2.7 Share customer feedback with others to improve the resolution of customer service problems 3.2 Refer customers to other sources of help if their problems cannot be resolved</p> <p>Unit 17 Develop customer relationships 2.3 Share feedback from customers with others 2.4 Identify added value that the organisation could offer customers</p> <p>Unit 31 Develop working relationships with colleagues 2.1 Recognise the contribution of colleagues to the achievement of team objectives 2.2 Treat colleagues with respect, fairness and courtesy 2.3 Fulfil agreements made with colleagues 2.4 Provide support and constructive feedback to colleagues 3.1 Take others' viewpoints into account when making decisions</p> |
| | <ul style="list-style-type: none"> Share personal learning and case studies with others, presenting recommendations, and improvement to support good practice. | <p>Unit 1 Deliver Customer Service 5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery</p> |

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| | | <p>Unit 15 Resolve customer service problems 2.7 Share customer feedback with others to improve the resolution of customer service problems</p> <p>Unit 17 Develop customer relationships 2.3 Share feedback from customers with others</p> <p>Unit 31 Develop working relationships with colleagues 2.4 Provide support and constructive feedback to colleagues 3.1 Take others' viewpoints into account when making decisions</p> |
| <p>Equality – treating all customers as individuals</p> | <ul style="list-style-type: none"> • Treat customers as individuals to provide a personalised customer service experience. | <p>Unit 1 Deliver Customer Service 4.2 Adapt their own behaviour to meet customers' needs or expectations</p> <p>Unit 6 Communicate verbally with customers 2.1 Identify customers' wants and priorities 2.2 Listen 'actively' to what customers are saying 2.6 Adapt their response in accordance with customers' changing behaviour 2.7 Provide information and advice that meets customers' needs</p> <p>Unit 7 Communicate with customers in writing 3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>Unit 8 Deal with incoming telephone calls from customers 2.3 Adapt their own communication style to meet customers' needs</p> |

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| | | 3.1 Respond in a way that best meets customer and organisational requirements |
| | <ul style="list-style-type: none"> Uphold the organisations core values and service culture through your actions. | <p>Unit 1 Deliver Customer Service 4.1 Maintain organisational standards of presentation and behaviour when providing customer service 4.3 Respond to customers' requests in line with organisational guidelines</p> <p>Unit 6 Communicate verbally with customers 2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers</p> <p>Unit 7 Communicate with customers in writing 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing</p> <p>Unit 8 Deal with incoming telephone calls from customers 2.1 Verify the identity of callers in line with organisational guidelines 2.6 Record information in line with organisational guidelines</p> <p>Unit 16 Deliver customer service to challenging customers 2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers</p> |
| Presentation – dress code, professional language | <ul style="list-style-type: none"> Demonstrate personal pride in the job through appropriate dress and positive and confident language. | <p>Unit 1 Deliver Customer Service 4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>Unit 6 Communicate verbally with customers 2.3 Communicate clearly, concisely and professionally with</p> |

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| | | <p>customers 2.8 Maintain organisational standards of behaviour and communication when interacting with customers</p> <p>Unit 7 Communicate with customers in writing 3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>Unit 8 Deal with incoming telephone calls from customers 2.2 Speak clearly, concisely and politely using speech and tone to create a rapport 2.3 Adapt their own communication style to meet customers' needs</p> <p>Unit 15 Resolve customer service problems 2.3 Use the most appropriate method of communication for dealing with customers 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process</p> <p>Unit 31 Develop working relationships with colleagues 3.2 Take ownership of problems within own level of authority</p> |
| <p>'Right first time'</p> | <ul style="list-style-type: none"> • Use communication behaviours that establish clearly what each customer requires and manage their expectations. | <p>Unit 6 Communicate verbally with customers 2.1 Identify customers' wants and priorities 2.2 Listen 'actively' to what customers are saying 2.3 Communicate clearly, concisely and professionally with customers 2.4 Use a tone of voice and expression that reinforces messages when communicating with customers 2.5 Use language that reinforces empathy with customers</p> |

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| | | <p>2.6 Adapt their response in accordance with customers' changing behaviour</p> <p>2.7 Provide information and advice that meets customers' needs</p> <p>2.9 Check that customers have understood what has been communicated</p> <p>Unit 7 Communicate with customers in writing</p> <p>3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone</p> <p>3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>Unit 8 Deal with incoming telephone calls from customers</p> <p>2.3 Adapt their own communication style to meet customers' needs</p> <p>2.4 Listen actively to what customers are saying to collect as much information as possible</p> <p>2.5 Use questioning techniques that are appropriate to the conversation</p> <p>2.6 Record information in line with organisational guidelines</p> <p>3.4 Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>Unit 12 Exceed customer expectations</p> <p>2.1 Identify differences between customers' expectations and needs and the service offer</p> <p>2.2 Explain the service offer clearly and concisely to customers</p> <p>2.6 Record agreements made and actions taken</p> <p>Unit 15 Resolve customer service problems</p> <p>2.3 Use the most appropriate method of communication for dealing with customers</p> |
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| | | <p>2.5 Keep customers informed of progress 2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems</p> <p>Unit 16 Deliver customer service to challenging customers 2.2 Express understanding of customers' point of view without admitting liability 2.3 Explain to customers the limits of the service they can offer 2.4 Explain to customers the reasons for an organisation's position and policy</p> <p>Unit 17 Develop customer relationships 2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback</p> |
| | <ul style="list-style-type: none"> • Take ownership from the first contact and then take responsibility for fulfilling your promise. | <p>Unit 7 Communicate with customers in writing 3.3 Record decisions and actions taken and the reasons for them</p> <p>Unit 8 Deal with incoming telephone calls from customers 3.4 Confirm that the customer is satisfied with the outcomes of the conversation 3.5 Complete agreed post-call follow-up actions</p> <p>Unit 12 Exceed customer expectations 2.4 Make offers to customers within their own authority levels</p> <p>Unit 15 Resolve customer service problems 2.6 Fulfil promises made to customers during the resolution process</p> |

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| | | <p>Unit 31 Develop working relationships with colleagues 3.2 Take ownership of problems within own level of authority 3.4 Resolve problems within their own level of authority and agreed contribution</p> |
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