

# Qualification specification

**NCFE Level 2 Certificate in Principles of  
Customer Service**

**QN: 601/7070/0**

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## Summary of changes

**This section summarises the changes to this qualification specification since the last version (Issue 3 July 2018). Please check the qualification page on our website for the most recent version.**

- Information regarding the wellbeing and safeguarding of learners added to Section 1 (page 14).
- Further information added to the achieving this qualification section to confirm that, unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.
- Information added to the entry guidance section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.
- Information added to the support for centres section about how to access support handbooks.
- Reference to GDPR legislation has been updated.

# Section 1

## Qualification overview

## **Qualification overview**

### **Introduction**

We want to make your experience of working with NCFE as pleasant and easy as possible. This qualification specification contains everything you need to know about this qualification and should be used by everyone involved in the planning, delivery and assessment of the NCFE Level 2 Certificate in Principles of Customer Service.

All information contained in this specification is correct at the time of publishing.

To ensure that you're using the most up-to-date version of this qualification specification please check the issue date in the page headers against that of the qualification specification on the NCFE website.

If you advertise this qualification using a different or shortened name you must ensure that learners are aware that their final certificate will state the regulated qualification title of NCFE Level 2 Certificate in Principles of Customer Service.

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**Things you need to know**

Qualification number (QN)	<b>601/7070/0</b>
Aim reference	60170700
Total qualification time (TQT)	200
Guided learning hours (GLH):	180
Level	2
Assessment requirements	internally assessed and externally moderated portfolio of evidence  Unless stated otherwise in this qualification specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

**Total Qualification Time (TQT)**

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

Total Qualification Time comprises:

- the Guided Learning Hours for the qualification
- an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, Tutor or other appropriate provider of education or training.

**About this qualification**

This is a regulated qualification. The regulated number for this qualification is 601/7070/0.

This qualification is part of a suite of knowledge-based qualifications. It has been developed to enable learners to progress into employment in customer service roles or onto higher level studies.

This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

This qualification is suitable for use within a Study Programme.

### Aims and objectives of this qualification

This qualification aims to:

- provide learners with the underpinning knowledge that is required by employees to work in a range of different environments within a customer service role.

The objectives of this qualification are to help learners to:

- develop essential knowledge of how to carry out customer service tasks, such as how to manage information and supporting events
- know how to apply their knowledge in a variety of industries and job roles.

### Achieving this qualification

To be awarded the NCFE Level 2 Certificate in Principles of Customer Service learners are required to successfully complete 3 mandatory units and 4 optional units.

This qualification consists of 3 mandatory units:

Unit No	Unit title
Unit 01	Principles of customer service and delivery
Unit 02	Understand customers
Unit 03	Understand employer organisations

and 10 optional units:

Unit No	Unit title
Unit 04	Understand how to communicate with customers
Unit 05	Understand how to communicate with customers using the telephone
Unit 06	Understand how to handle customer information
Unit 07	Understand how to deliver customer service online
Unit 08	Understand how to resolve problems and deliver customer service to challenging customers
Unit 09	Understand how to handle objections, promote additional products or services and close sales
Unit 10	Understand how to develop customer relationships
Unit 11	Understand how to process sales orders and provide post transaction customer service
Unit 12	Principles of equality and diversity in the workplace
Unit 13	Understand how to develop working relationships with colleagues



The learning outcomes and assessment criteria for each unit are provided in Section 2.

To achieve the NCFE Level 2 Certificate in Principles of Customer Service, learners must successfully demonstrate their achievement of all learning outcomes and assessment criteria of the units as detailed in this qualification specification. Grades are not awarded.

A unit certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

### **Essential skills**

While completing this qualification, learners may develop the knowledge, understanding and essential skills employers look for in employees. These range from familiar 'key skills' such as team working, independent learning and problem solving, to more tricky-to-measure skills such as:

- an appreciation for appropriate behaviour and dress
- appropriate interpersonal skills
- communicating with professional colleagues/peers and/or hierarchical seniors
- supporting other aspiring employees
- personal manners and deportment
- understanding work practices and how different roles and departments function within an organisation.

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### **Entry guidance**

There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.

Registration is at the discretion of the centre, in accordance with equality legislation, and should be made on the Portal. However, learners must be aged 16 or above to undertake this qualification.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the assessment criteria and comply with the relevant literacy, numeracy and health and safety aspects of this qualification.

Learners registered on this qualification shouldn't undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

### Progression opportunities

Learners who achieve this qualification could progress to:

- NCFE Level 2 Diploma in Customer Service
- NCFE Level 3 Certificate in Principles of Customer Service
- NCFE Level 3 Diploma in Customer Service
- NCFE Level 4 NVQ Diploma in Customer Service

It may also be useful to learners studying qualifications in the following sector areas:

- Travel and Tourism
- Sport, Leisure and Recreation
- Retail
- Health Public Service and Care
- Engineering and Manufacturing Technologies
- Arts, Media and Publishing

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### Recognition of Prior Learning (RPL)

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by a qualified RPL Advisor.

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### Qualification dates

Regulated qualifications have operational end dates and certification end dates.

We review qualifications regularly, working with sector representatives, vocational experts and stakeholders to make any changes necessary to meet sector needs and to reflect recent developments.

If a decision is made to withdraw a qualification, we will set an operational end date and provide reasonable notice to our centres. We will also take all reasonable steps to protect the interest of learners.

An operational end date will only show on the Ofqual Register of Regulated Qualifications [register.ofqual.gov.uk](http://register.ofqual.gov.uk) and on our website if a decision has been made to withdraw a qualification. After this date we can no longer accept learner registrations. However, certification is allowed until the certification end date so that learners have time to complete any programmes of study. The certification end date will only show on the Ofqual Register once an operational end date has been set. After this date we can no longer process certification claims.

### Staffing requirements

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register

- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

### **Assessors and Internal Quality Assurance**

Staff involved in the Assessment and Internal Quality Assurance of this qualification must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the units being assessed and internal quality assured. This may be gained through experience and/or qualifications.

### **Examples of relevant qualifications/experience**

This section provides examples of relevant qualifications/experience to demonstrate occupational knowledge/competence for Assessors and Internal Quality Assurers.

### **Examples of relevant qualifications**

Degree in Customer Service Management or a customer service-related subject:

- Level 3 NVQ or Diploma in Customer Service
- A level in Customer Service or customer service-related subject
- Staff must be working towards an Assessor qualification. Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably qualified Assessor/Verifier

### Examples of work experience

- Staff must have recent and relevant experience of working in a customer service role – ideally within a supervisory or management context
- Teaching specialist in customer service or a similar discipline.

The guidance in this section isn't intended to be exhaustive or definitive. Examples of relevant qualifications and occupational backgrounds are given as benchmarks. Other equivalent qualifications or backgrounds may also qualify prospective staff for assessment/internal quality assurance roles.

NCFE is not responsible for any complications that arise in the delivery, assessment or internal quality assurance process as a result of internal recruitment and training decisions. Decisions regarding staff recruitment and training should be made at the discretion of centres. Centres should be aware of their obligations under their Agreement with NCFE to ensure that all staff involved in the delivery, assessment and internal quality assurance of NCFE qualifications are suitably qualified/experienced.

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### Resource requirements

The units in this qualification have been mapped against those of the NCFE Level 2 Diploma in Customer Service (601/3973/0). Please see the mapping document for further information, which is available on the qualification page of the NCFE website.

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### Support for learners

#### Learner's Evidence Tracking Log (LETL)

The LETL can help learners keep track of their work. This blank document can be downloaded free of charge from the NCFE website. You don't have to use the LETL – you can devise your own evidence-tracking document instead.

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### Support for centres

This qualification specification must be used alongside the mandatory support handbook which can be found on the NCFE website. This contains additional supporting information to help with planning, delivery and assessment.

This qualification specification contains all the qualification-specific information you will need that is not covered in the support handbook.

## Centre Support team

Our award-winning Customer Support team will support you with approvals, registrations, external quality assurance, external assessment, results and certification. You can contact Customer Support Assistant on 0191 239 8000 or email [customersupport@ncfe.org.uk](mailto:customersupport@ncfe.org.uk)

## Reasonable Adjustments and Special Considerations Policy

This policy is aimed at customers - including learners - who use our products and services and who submit requests for reasonable adjustments and special considerations. The policy can be found on the NCFE website

## Subject maps

Our suite of subject maps showcase the qualifications we have available within each specialist sector and how they connect to each other. They demonstrate how you can plot routes for your learners at different levels from entry level right through to higher education or the workforce, with supporting qualifications along the way.

## Fees and Pricing

The current fees and pricing guide is available on the NCFE website.

## Training and support

We can provide training sessions for Assessors and Internal Moderators. Bespoke subject-specific training is also available. For further information please contact our Quality Assurance team on 0191 239 8000.

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## Learning resources

We offer a wide range of learning resources and materials to support the delivery of our qualifications. Please check the qualifications page on the NCFE website for more information and to see what is available for this qualification.

Materials to support the delivery of this qualification can be purchased from the following Partners:

### Learning Curve Group

- 01388 777129
- [info@learningcurvegroup.co.uk](mailto:info@learningcurvegroup.co.uk)

### The Skills Network

- 01757 210 022
- [LearningResourcesSales@TheSkillsNetwork.com](mailto:LearningResourcesSales@TheSkillsNetwork.com)

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

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### **Links to National Skills Standards**

For this qualification we've highlighted where learning opportunities for the Functional Skills qualifications may be found.

This qualification can be used to develop learners':

- English skills
- Mathematics skills
- Information and Communication Technology skills.

If a learner wishes to gain a Functional Skills qualification, they must successfully pass the relevant Functional Skills assessment.

This qualification has also been mapped to the Personal, Learning and Thinking Skills (PLTS) framework.

The Skills Mapping document for this qualification can be found on the qualification page of the NCFE website.

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# Section 2

## Unit content and assessment guidance

## Unit content and assessment guidance

This section provides details of the structure and content of this qualification.

The unit summary provides an overview of each unit including:

- unit title
- unit overview
- guided learning hours
- level
- an indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- unit title and number
- learning outcomes (the learner will) and assessment criteria (the learner can)
- assessment guidance (types of evidence for internal assessment).

The regulators' unit number is indicated in brackets for each unit (for example, M/100/7116). However, to make cross-referencing assessment and moderation easier, we've used a sequential numbering system in this document for each unit.

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes and assessment criteria are covered and if the evidence generated can be internally and externally moderated. For approval of methods of internal assessment other than portfolio building, please contact the Quality Assurance team at NCFE.

For further information or guidance about this qualification please contact our Research and Product Development team on 0191 239 8000.

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**Unit 01 Principles of customer service and delivery (Y/507/5967)**

<b>Unit summary</b>	This unit provides learners with an understanding of customer service and its effective delivery. Legal and ethical requirements relating to customer service and maintaining customer service information are also covered.
<b>Guided learning hours</b>	50
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

The learner will:

- 1 Understand customer service

The learner can:

- 1.1 Explain the purpose and scope of customer service
- 1.2 Define the term 'service offer'
- 1.3 Explain the value of a 'service offer' to an organisation
- 1.4 Explain the importance of delivering **consistently high quality customer service**
- 1.5 Explain the importance of keeping up to date with knowledge of competitors' activities
- 1.6 Explain barriers to providing effective customer service
- 1.7 Describe the features of effective follow-up service

The learner will:

- 2 Understand how legal and ethical requirements relate to customer service

The learner can:

- 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

**Unit 01 Principles of customer service and delivery (Y/507/5967)  
(cont'd)**

The learner will:

- 3 Understand how to deliver effective customer service

The learner can:

- 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
- 

The learner will:

- 4 Understand the management of customer service information

The learner can:

- 4.1 Explain how **customer service information** can be used
  - 4.2 Explain the importance of systems to manage customer service information
  - 4.3 Explain the uses of systems to manage customer service information
  - 4.4 Identify the features of an effective customer complaints process
  - 4.5 Describe the uses of a customer complaints process
- 

The learner will:

- 5 Understand customer service delivery

The learner can:

- 5.1 Explain the relationship between customers' needs and expectations and customer satisfaction
- 5.2 Describe the **features** and **benefits** of an organisation's products and/or services
- 5.3 Explain the importance of treating customers as individuals
- 5.4 Explain the importance of balancing promises made to customers with the needs of an organisation
- 5.5 Explain when and to whom to escalate problems
- 5.6 Describe **methods of measuring their own effectiveness** in the delivery of customer service

**Unit 01 Principles of customer service and delivery (Y/507/5967)  
(cont'd)**

The learner will:

- 6 Understand the relationship between customer service and a brand

The learner can:

- 6.1 Explain the importance of a **brand** to an organisation  
6.2 Explain how a brand affects an organisation's customer service offer  
6.3 Explain the importance of using **customer service language** that supports a brand promise  
6.4 Identify **their own** role in ensuring that a brand promise is delivered
- 

**Key words**

- 1.4 learners should also include the implications of not delivering **consistently high quality customer service**
- 2.1 **sales and consumer-related legislation and regulations** could include the Sale of Goods Act, Supply of Goods and Services Act, Consumer Credit Act, and Distance Selling Regulations. Learners should also comment on the relevance of general data protection as per the UK General Data Protection Regulation (UK GDPR).
- 2.2 **health, safety and environmental legislation** - learners should choose to describe legislation relevant to their chosen industry
- 2.3 **ethical** considerations could include courtesy, respect, commitment, and honesty
- 2.5 **legislation** should include general data protection as per UK GDPR
- 3.3 **managing customers' expectations** - learners should also include reference to the managers' expectations
- 3.6 **following up actions and keeping promises** - learners should include the implications when customer service is not delivered as promised
- 4.1 **customer service information** - learners should include the relevance of general data protection as per UK GDPR
- 5.2 **features** are the characteristics, attributes and qualities of a product or service, whilst **benefits** are the advantages and uses of a service or product

**Unit 01 Principles of customer service and delivery (Y/507/5967) (cont'd)****Key words (cont'd)**

**5.6 methods of measuring their own effectiveness** may include, but aren't limited to:

- customer feedback
- peer feedback
- reviewing performance against targets

**6.1 a brand** is a type of product or service provided by a particular company under a specific name

**6.3 customer service language** could include phrases such as:

- 'My pleasure'
- 'No problem'
- 'Have a good day'
- 'Thank you for your custom'

The language chosen will be dependent on the learner's environment

**6.4** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study

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**Unit 01 Principles of customer service and delivery (Y/507/5967) (cont'd)****Assessment guidance**

AC	Assessment guidance	Suggested assessment method
1.1–6.4		learner written statements
1.1–6.4	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–6.4	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–6.4	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

Assessment guidance provided is for example purposes only and is not intended to be exhaustive. Learners should always be encouraged to conduct research to identify examples relating to their chosen industry.

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**Unit 02 Understand customers (D/507/5968)**

<b>Unit summary</b>	This unit provides learners with an understanding of the different types of customers. Learners will understand the relationship between good customer service and customer loyalty, and how this affects the organisation in terms of reputation and image.
<b>Guided learning hours</b>	20
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

The learner will:

- 1 Understand different types of customers

The learner can:

- 1.1 Explain the distinctions between internal and external customers
- 1.2 Explain how **cultural factors** can affect customers' expectations
- 1.3 Describe the characteristics of **challenging customers**
- 1.4 Explain how to identify **dissatisfied customers**
- 1.5 Describe **common techniques** for dealing with dissatisfied customers

The learner will:

- 2 Understand the value of customers and their loyalty

The learner can:

- 2.1 Explain how the achievement of the customer **service offer** contributes to enhancing customer loyalty
- 2.2 Explain the relationship between customer satisfaction and organisational performance
- 2.3 Explain how the reputation and image of an organisation affect customers' perceptions of its products and/or services
- 2.4 Explain the **potential consequences** of customers' dissatisfaction
- 2.5 Describe **different methods** of attracting customers and retaining their loyalty

**Unit 02 Understand customers (D/507/5968) (cont'd)****Key words****1.2 cultural factors** can include:

- stories portrayed in the media
- industry standard setting
- demographics, such as age, gender and socioeconomic status
- religious or moral views

**1.3 challenging customers** may be angry, unreasonable, or confused. It is important to remember there are many reasons why people behave as they do, and not all customers who present in this way are necessarily challenging.**1.4 dissatisfied customers** - learners should include reasons why customers could be dissatisfied, such as:

- late deliveries
- not receiving what was promised
- damaged or incorrect goods
- items being out of stock
- no available appointments

The reasons chosen will be dependent on the learner's environment.

**1.5 common techniques** could include:

- apologising and acknowledging their feelings
- sympathising and letting them talk
- active listening
- preparing to help
- asking questions and making notes or showing interest
- echoing key points
- giving the customer undivided attention
- speaking normally and remaining calm
- presenting a solution
- taking action

**2.1 a service offer** is defined as the extent and limits of the customer service that an organisation offers**2.4 potential consequences** may include cancelling an order, formal complaints, losing the customer to a competitor, or bad publicity**2.5 different methods** may include advertising, website, newsletters, special offers, loyalty cards, and delivering as promised

**Unit 02 Understand customers (D/507/5968) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.5		learner written statements
1.1–2.5	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.5	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.5	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	Assignments, projects and/or case studies

Assessment guidance provided is for example purposes only and is not intended to be exhaustive. Learners should always be encouraged to conduct research to identify examples relating to their chosen industry.

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**Unit 03 Understand employer organisations (A/507/5895)**

<b>Unit summary</b>	This unit ensures learners understand organisational structures and the differences between the private, public and voluntary sectors. Learners will be able to describe the internal and external influences on organisations and why change within the business environment is important.
<b>Guided learning hours</b>	40
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

The learner will:

- 1 Understand organisational structures

The learner can:

- 1.1 Explain the differences between the private sector, public sector and voluntary sector
- 1.2 Explain the functions of **different organisational structures**
- 1.3 Describe the features of **different types of legal structures** for organisations

The learner will:

- 2 Understand the organisational environment

The learner can:

- 2.1 Describe the internal and external influences on organisations
- 2.2 Explain the use of different **models of analysis** in understanding the organisational environment
- 2.3 Explain why change in the business environment is important

### Unit 03 Understand employer organisations (A/507/5895) (cont'd)

#### Key words

- 1.2 **different organisational structures** could include functional, product/activity, area (regional or geographical), and flat and hierarchy
  - 1.3 **different types of legal structures** could include sole trader, partnership, private company (Ltd), and public company (PLC)
  - 2.2 **models of analysis** should include SWOT (strengths, weaknesses, opportunities and threats) and PESTLE (political, economic, social, technological, legal and environment)
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**Unit 03 Understand employer organisations (A/507/5895) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.3		learner written statements
1.1–2.3	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.3	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.3	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

Assessment guidance provided is for example purposes only and is not intended to be exhaustive. Learners should always be encouraged to conduct research to identify examples relating to their chosen industry.

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**Unit 04 Understand how to communicate with customers (H/507/5969)**

<b>Unit summary</b>	In this unit learners have the opportunity to increase their knowledge of communication techniques. They will identify and adapt their communication styles in order to offer the best customer service. Learners will increase their knowledge of the different forms of written communication and be able to select the most appropriate method that meets the needs of the customers.
<b>Guided learning hours</b>	20
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to communicate verbally with customers

The learner can:

- 1.1 Explain the importance of effective communication in customer service
- 1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
- 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

The learner will:

- 2 Understand how to communicate with customers in writing

The learner can:

- 2.1 Explain why it is necessary to use different forms of **written communication** for different purposes
- 2.2 Describe **practices** for producing different forms of written communications
- 2.3 Describe the potential benefits and limitations associated with communicating with customers in writing
- 2.4 Explain the **implications** of confidentiality and data protection in communicating with customers in writing

**Unit 04 Understand how to communicate with customers (H/507/5969)  
(cont'd)**

**Key words**

- 1.3 **customer service language** could include phrases such as:

- 'My pleasure'
- 'No problem'
- 'Have a good day'
- 'Thank you for your custom'

The language chosen will be dependent on the learner's environment.

**1.4 questioning techniques** may include:

- open
- closed
- verbal
- written
- probing
- clarification

**1.5** a **verbal signal** is a phrase or statement said by the customer, whilst a **non-verbal signal** is the body language of the customer

**2.1 written communication** could include letters, emails, or online forums

**2.2 practices** should include organisation's conventions

**2.4 implications** includes those of a legal nature

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**Unit 04 Understand how to communicate with customers (H/507/5969)  
(cont'd)**

**Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.4		learner written statements
1.1–2.4	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.4	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.4	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 05 Understand how to communicate with customers using the telephone (Y/507/5970)**

<b>Unit summary</b>	This unit provides learners with an understanding of the different techniques of dealing with incoming calls from customers. They will develop the ability to communicate effectively and deal with customer questions and requests. Learners will develop the knowledge to support the planning and making of calls to customers - giving the required information in line with organisational procedures.
<b>Guided learning hours</b>	20
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to deal with incoming customer calls

The learner can:

- 1.1 Explain why an organisation should have guidance on dealing with telephone calls
- 1.2 Explain why an organisation should have an **identity checking process**
- 1.3 Explain the importance of keeping customer information up to date
- 1.4 Explain the importance of keeping customers **informed of the progress of their call**
- 1.5 Describe how body language and facial expressions can be detected over the telephone
- 1.6 Describe different **questioning techniques** used when dealing with incoming calls
- 1.7 Explain how to handle abusive calls

**Unit 05 Understand how to communicate with customers using the telephone (Y/507/5970)  
(cont'd)**

The learner will:

- 2 Understand how to make telephone calls to customers

The learner can:

- 2.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls
- 2.2 Explain the importance of keeping customer information up to date
- 2.3 Explain the reasons for organisational guidance on dealing with telephone calls
- 2.4 Explain the reasons for organisational identity checking processes
- 2.5 Explain how body language and facial expressions can be detected over the telephone
- 2.6 Describe different questioning techniques when dealing with customers
- 2.7 Explain organisational guidelines for what can and cannot be said or promised
- 2.8 Explain how to handle abusive calls from customers

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**Key words**

- 1.2 identity checking process** - learners should include reference to general data protection as per UK GDPR in their answers
- 1.4 informed of the progress of their call** - learners should include reference to placing callers on hold, where appropriate
- 1.6 questioning techniques** may include:
- open
  - closed
  - verbal
  - written
  - probing
  - clarification
-



**Unit 05 Understand how to communicate with customers using the telephone (Y/507/5970)  
(cont'd)**

**Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.8		learner written statements
1.1–2.8	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.8	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.8	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 06 Understand how to handle customer information (D/507/5971)**

<b>Unit summary</b>	This unit develops the learner's understanding and knowledge of customer service information systems and handover procedures - they will be able to record, retrieve and process information. Learners also plan and carry out handovers with colleagues in line with organisational procedures.
<b>Guided learning hours</b>	20
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to process customer information

The learner can:

- 1.1 Describe the functions of **customer information systems**
- 1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information
- 1.3 Explain **different responsibilities and levels of authority** for processing customer service information
- 1.4 Explain the reliability of sources of customer information
- 1.5 Explain the validity of customer information

The learner will:

- 2 Understand the customer service handover process

The learner can:

- 2.1 Explain an organisation's **customer service handover** procedures
- 2.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
- 2.3 Explain why, when and how to set reminders to follow up on actions handed over to others
- 2.4 Explain levels of **their own** responsibility in the customer service handover process

**Unit 06 Understand how to handle customer information (D/507/5971) (cont'd)****Key words**

- 1.1** **customer information systems** should include a minimum of 2 systems, one of which should be for the learner's chosen organisation or industry
  - 1.3** **different responsibilities and levels of authority** should include an explanation of the lines of communication in the learner's chosen organisation
  - 2.1** a **customer service handover** is when one member of staff presents the needs of the customer to another member of staff - this could be due to a range of factors, such as a shift change or escalation
  - 2.4** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
-

**Unit 06 Understand how to handle customer information (D/507/5971) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.4		learner written statements
1.1–2.4	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.4	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.4	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 07 Understand how to deliver customer service online (H/507/5972)**

<b>Unit summary</b>	This unit provides learners with the knowledge of online customer service systems and social media in business. Learners will be able to support customers and deal with queries in line with organisational procedures.
<b>Guided learning hours</b>	25
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to support customers through real-time online customer service

The learner can:

- 1.1 Explain how an organisation’s **online customer service system** works
- 1.2 Explain how to navigate **their own** customer service site
- 1.3 Describe the **questioning techniques** that may be used when supporting customers through real-time online customer services
- 1.4 Explain how to adapt their own communication style to meet customers’ ability to use online systems

The learner will:

- 2 Understand social media in a business environment

The learner can:

- 2.1 Explain how different **social media platforms** can be used for customer service
- 2.2 Describe different audience groups for a range of social media platforms
- 2.3 Explain the importance of **monitoring customer posts** in social media networks
- 2.4 Explain organisational policy and guidelines for the use of social media for customer service purposes
- 2.5 Explain the etiquette of communication within different social media platforms
- 2.6 Explain the importance of security settings and how they are used on different social media platforms
- 2.7 Identify the **information** that can be shared when colleagues are involved in exchanges using social media

**Unit 07 Understand how to deliver customer service online (H/507/5972)  
(cont’d)**

**Key words**

- 1.1 **online customer service systems** could refer to:
  - automated online assistants
  - instant messages
  - technical support operators/technicians

- 1.2** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
- 1.3** **questioning techniques** may include:
- open
  - closed
  - verbal
  - written
  - probing
  - clarification
- 2.1** **social media platforms** may include:
- Twitter
  - Facebook
  - online forums
- 2.3** **monitoring customer posts** - the learner's answer should reference both positive and negative posts
- 2.7** **information** - the learner's answer should include reference to general data protection as per UK GDPR
-

**Unit 07 Understand how to deliver customer service online (H/507/5972) (cont'd)**

**Assessment guidance**

AC	Assessment guidance	Suggested assessment method
1.1–2.7		learner written statements
1.1–2.7	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.7	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.7	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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### Unit 08 Understand how to resolve problems and deliver customer service to challenging customers (K/507/5973)

<b>Unit summary</b>	This unit provides learners with an understanding of how to deal with challenging customers and describe techniques to resolve problems. Learners will be able to identify customer service problems, agree solutions to problems, and manage unresolved problems by referral to other sources.
<b>Guided learning hours</b>	30
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand the delivery of customer service to challenging customers

The learner can:

- 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
- 1.3 Explain **behaviours** that make it challenging to deal with customers
- 1.4 Explain the difference between assertive and aggressive behaviour
- 1.5 Describe **techniques** to deal with customers' challenging behaviour
- 1.6 Explain **their own** levels of authority for agreeing actions outside the service offer
- 1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters



**Unit 08 Understand how to resolve problems and deliver customer service to challenging customers (K/507/5973) (cont'd)**

The learner will:

2 Understand the resolution of customer service problems

The learner can:

- 2.1 Describe an organisation's customer service and complaints procedures
  - 2.2 Describe techniques to identify customer service problems and their causes
  - 2.3 Describe techniques to deal with situations where customers become agitated or angry
  - 2.4 Explain the limits of **their own** authority for resolving customers' problems and making promises
  - 2.5 Explain the purpose of encouraging customers to provide **feedback**
  - 2.6 Describe methods used to encourage customers to provide feedback
-

**Key words**

- 1.1 challenging customers** may be angry, unreasonable, or confused. They may have problems, questions, additional requirements, poor communication skills or language barriers
- 1.3 behaviours** may include:
- aggression
  - frustration
  - irritation
  - confrontation
- 1.5 techniques** could include:
- apologising and acknowledging their feelings
  - sympathising and letting customers talk
  - active listening
  - preparing to help
  - asking questions and making notes or showing interest
  - echoing key points
  - give the customer undivided attention
  - speaking normally and remaining calm
  - presenting a solution
  - taking action
- 1.6** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
- 2.4** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
- 2.5 feedback** - learners should mention the purpose of collecting both positive and negative feedback
-

### Unit 08 Understand how to resolve problems and deliver customer service to challenging customers (K/507/5973) (cont'd)

#### Assessment guidance

AC	Assessment guidance	Suggested assessment method
1.1–2.6		learner written statements
1.1–2.6	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.6	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.6	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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### Unit 09 Understand how to handle objections, promote additional products or services and close sales (M/507/5974)

<b>Unit summary</b>	This unit provides learners with the knowledge of how to handle sales objections. Learners will be able to establish the nature of the objection and promote the benefits of the product and service to overcome objections and close the sale. Learners will also be able to identify opportunities to promote additional products in line with organisational procedures.
<b>Guided learning hours</b>	30
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to handle sales objections

The learner can:

- 1.1 Explain the difference between standard and non-standard sales objections
- 1.2 Explain how to clarify objections and identify potential sales opportunities from them
- 1.3 Describe how to use **questioning techniques** to explore and resolve customer issues
- 1.4 Explain how to empathise with and reassure the customer
- 1.5 Explain the difference between hypothetical and real objections
- 1.6 Explain how knowledge of products and services can be used to answer objections
- 1.7 Explain how competitor activity may affect the potential sale
- 1.8 Describe how industry/sector pricing structures may have an impact on sales objections
- 1.9 Explain the scope of authority and responsibility when dealing with objections
- 1.10 State who to go to when in need of support to overcome objections

**Unit 09 Understand how to handle objections, promote additional products or services and close sales (M/507/5974) (cont'd)**

The learner will:

- 2 Understand how to close the sale

The learner can:

- 2.1 Explain how to identify **verbal** and **non-verbal buying signals** as signs of whether to move towards closing the sale
  - 2.2 Explain how to perform a trial close
  - 2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
  - 2.4 Explain potential barriers to closing the sale
  - 2.5 Explain a range of ways to close the sale
- 

The learner will:

- 3 Understand the promotion of additional products and/or services to customers

The learner can:

- 3.1 Describe organisational policies and procedures on the promotion of additional products and/or services
  - 3.2 Explain the importance of keeping product/service knowledge up to date
  - 3.3 Explain how to match products and/or services to customer needs
  - 3.4 Describe **techniques** to promote additional products and/or services
-

**Unit 09 Understand how to handle objections, promote additional products or services and close sales (M/507/5974) (cont'd)****Key words****1.3 questioning techniques** may include:

- open
- closed
- verbal
- written
- probing
- clarification

**2.1 non-verbal buying signals** could include:

- casual handling of the product
- looking at many different products without showing sincere interest in any of them
- moving around the store quickly
- making eye contact
- looking at the features of the product or service
- spending a long time looking at one product
- looking around for help

**2.1 verbal buying signals** could include:

- making 'not now' excuses
- stating they have to speak with their partner prior to purchasing
- asking about return policies
- asking detailed questions about the product, including price
- engaging in a conversation with you
- asking you or someone else for their opinion of the product or service
- using possessive language as if they've already purchased the product or service

**3.4 techniques** may include:

- verbal communication
  - written communication
  - product placement
-

**Unit 09 Understand how to handle objections, promote additional products or services and close sales (M/507/5974) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–3.4		learner written statements
1.1–3.4	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–3.4	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–3.4	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 10 Understand how to develop customer relationships (T/507/5975)**

<b>Unit summary</b>	This unit provides learners with an understanding of how to develop customer relationships and the value of customer loyalty and retention to the organisation. Learners will be able to describe how customers form expectations of the service they receive and explain the limits of their own authority in implementing improvements.
<b>Guided learning hours</b>	30
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to develop customer relationships

The learner can:

- 1.1 Describe the importance of developing relationships with customers
- 1.2 Explain the value of customer loyalty and retention
- 1.3 Explain how **customers' expectations** may change over time
- 1.4 Explain the use of customer feedback as a means of developing customer relationships
- 1.5 Explain the limits of **their own** authority to make **alternative service offers** to customers
- 1.6 Describe the use of **customer relationship management systems** and processes to meet customers' expectations
- 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships

The learner will:

- 2 Understand how to exceed customer expectations

The learner can:

- 2.1 Explain how customers form expectations of the service they will receive
- 2.2 Explain legislation, **organisational policies** and procedures that can limit or vary the service offer
- 2.3 Explain the types of actions that customers are likely to perceive as adding value
- 2.4 Explain how to recognise when actions taken to **offer** added value could be built into the service offer



**Unit 10 Understand how to develop customer relationships (T/507/5975) (cont'd)**

The learner will:

- 3 Understand how to support customer service improvements

The learner can:

- 3.1 Describe different sources of information that may help identify ways of improving customer service
  - 3.2 Describe the constraints on suggesting improvements to customer service
  - 3.3 Explain the limits of their own authority in implementing improvements
-

**Unit 10 Understand how to develop customer relationships (T/507/5975) (cont'd)****Key words**

- 1.3 customer expectations** are what people think should happen and how they think they should be treated when asking for or receiving customer service
- 1.5** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
- 1.5 alternative service offers** may include:
- product replacement or upgrades
  - refunds
  - compensation
  - additional support
  - extended warranties
- 1.6 customer relationship management systems** may be software applications or paper-based systems to manage customer data
- 2.2 organisational policies** will be specific to the organisation, but could include:
- the time in which goods can be returned (returns policy)
  - gift receipts
  - the condition in which goods can be returned
  - the validity of gift vouchers, eg expiry date
  - the availability of the service offer
  - restrictions on the service offer, eg one per household or per customer
- 2.4 offers to customers** could include:
- providing promotional vouchers
  - offering additional services within organisational guidelines
  - offering additional services that have been advertised
-

**Unit 10 Understand how to develop customer relationships (T/507/5975) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–3.3		learner written statements
1.1–3.3	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–3.3	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–3.3	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 11 Understand how to process sales orders and provide post-transaction customer service (A/507/5976)**

<b>Unit summary</b>	This unit provides learners with an understanding of how to process sales orders and describe the advantages and disadvantages of post-transaction activity. Learners will know how to process orders using different methods of payment and provide a post-transaction service to customers in line with organisational procedures.
<b>Guided learning hours</b>	30
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand how to process and follow up sales orders

The learner can:

- 1.1 Explain the importance of sales order processing
- 1.2 Describe organisational processes for ordering products and/or services
- 1.3 Describe different sources of information used to check customer credit
- 1.4 Describe the different payment methods accepted by sales orientated organisations
- 1.5 Explain the role of the despatch function
- 1.6 Describe service standards relating to sales order completion
- 1.7 Explain the importance of storing information securely

The learner will:

- 2 Understand post-transaction customer service

The learner can:

- 2.1 Explain organisational **policies and procedures** for post-transaction customer service
- 2.2 Explain the purposes and range of post-transaction activities
- 2.3 Explain the implications of **sales contracts, guarantees and warranties** to post-transaction customer service
- 2.4 Explain how **legislation and regulation** affect customers' rights
- 2.5 Explain the advantages and disadvantages of post-transaction customer service programmes

**Unit 11 Understand how to process sales orders and provide post transaction customer service (A/507/5976) (cont'd)**

**Key words**

- 2.1 the **policies and procedures** explained should be in relation to the organisation or industry
- 2.3 where possible, the explanation should be in relation to the **sales contracts, guarantees and warranties** provided by the learner's chosen organisation or industry

- 2.4** specific, relevant examples of **legislation and regulation** should be referred to and explained, eg Sale of Goods Act, Supply of Goods and Services Act, Consumer Credit Act, Distance Selling Regulations
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### Unit 11 Understand how to process sales orders and provide post transaction customer service (A/507/5976) (cont'd)

#### Assessment guidance

AC	Assessment guidance	Suggested assessment method
1.1–2.5		learner written statements
1.1–2.5	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.5	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.5	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 12 Principles of equality and diversity in the workplace (K/507/5911)**

<b>Unit summary</b>	This unit develops the learner’s understanding of the standards and expectations for equality and diversity in the workplace. Learners will be able to identify the potential consequences of failing to comply with relevant legislation.
<b>Guided learning hours</b>	15
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand the implications of equality legislation

The learner can:

- 1.1 Define the concept ‘equality and diversity’
- 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 of failing to comply with **equality legislation**

The learner will:

- 2 Understand organisational standards and expectations for equality and diversity and context in the workplace

The learner can:

- 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

**Unit 12 Principles of equality and diversity in the workplace  
(K/507/5911) (cont'd)**

**Key words**

- 1.4** **benefits** include those relating to the employer, employees and customers
  - 1.5** **consequences** could include those which are legal, reputational and related to profits
  - 1.5** **equality legislation** will include, but is not exclusive to, the Equality Act 2010
  - 2.2** where the AC states **their own**, learners may use their own organisation, an organisation they're familiar with, or information within an assignment or case study
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**Unit 12 Principles of equality and diversity in the workplace (K/507/5911) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.3		learner written statements
1.1–2.3	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.3	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.3	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

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**Unit 13 Understand how to develop working relationships with colleagues (F/507/5896)**

<b>Unit summary</b>	This unit provides learners with an understanding of the principles of effective team working. Learners will be able to identify what’s expected of a buddy and techniques for providing feedback.
<b>Guided learning hours</b>	15
<b>Level</b>	2
<b>Mandatory/optional</b>	Optional

The learner will:

- 1 Understand the principles of effective team working

The learner can:

- 1.1 Outline the benefits of effective team working
- 1.2 Describe how to give feedback constructively
- 1.3 Explain **conflict management techniques** that may be used to resolve team conflicts
- 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

The learner will:

- 2 Understand how to buddy a colleague

The learner can:

- 2.1 Describe what is expected of a **buddy**
- 2.2 Explain techniques to give positive feedback and constructive criticism
- 2.3 Explain techniques to establish rapport with a buddy

**Unit 13 Understand how to develop working relationships with colleagues (F/507/5896) (cont'd)****Key words**

**1.3 conflict management techniques** may include:

- forcing
- win-win (collaboration)
- compromising
- withdrawing
- smoothing

Learners' answers should include an explanation of when they'd need to refer the conflict to their line manager or another member of senior staff.

**2.1 a buddy** is any colleague a learner is teamed with so the learner can provide them with ongoing support, training, development, feedback, mentoring and constructive criticism. The buddy could be new to the organisation or team, or they may be an experienced member of staff with whom the learner is to work on a specific project or task

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**Unit 13 Understand how to develop working relationships with colleagues (F/507/5896) (cont'd)****Assessment guidance**

<b>AC</b>	<b>Assessment guidance</b>	<b>Suggested assessment method</b>
1.1–2.3		learner written statements
1.1–2.3	discussions should always be planned and structured by the Assessor and learner to enable the learner to demonstrate their knowledge and understanding	record of professional discussion
1.1–2.3	where oral questioning is used, Assessors are required to record both questions and answers	record of oral/written questions
1.1–2.3	centres may support learners by providing appropriate assignments, projects or case studies to provide the basis for the learners' answers, or learners may use their own organisation (or an organisation they're familiar with) for their examples	assignments, projects and/or case studies

Assessment guidance provided is for example purposes only and is not intended to be exhaustive. Learners should always be encouraged to conduct research to identify examples relating to their chosen industry.

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# Section 3

## Assessment and Moderation

## Assessment and Moderation

### How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

The NCFE Level 2 Certificate in Principles of Customer Service is internally assessed and externally moderated.

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### Internal assessment

Each learner must create a portfolio of evidence which demonstrates achievement of all the learning outcomes and assessment criteria. On completion of each unit learners must declare that the work produced is their own. The Assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in Section 2 (page 15).

The main pieces of evidence for the portfolio could include (in no particular order):

- learner's proof of work
- Assessor observation – completed observational checklists and related action plans
- witness testimony
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- learner and peer reports
- Recognition of Prior Learning (RPL).

You'll also find a variety of assessment and moderation pro-formas here: [www.ncfe.org.uk/centre-information/assessment-and-moderation-pro-formas](http://www.ncfe.org.uk/centre-information/assessment-and-moderation-pro-formas).

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they're valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification. Acceptable methods of assessment could be drawn from the list above.

Assessors must be satisfied that learners have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if learners have been successful. Assessors are also responsible for supporting learners through the assessment process.

For approval of methods of internal assessment other than portfolio building, please contact the Quality Assurance team on 0191 239 8000.

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## **Presenting evidence**

### **Written**

Written evidence may be presented in word-processed or handwritten form. Audio-visual content (videos, pictures, drawings, audio) may also be used.

Tables, graphs and spreadsheets may be produced using appropriate ICT.

Any copied material must be suitably acknowledged, and quotations must be clearly marked and a reference provided wherever possible to ensure that learner work can be authenticated.

### **Recorded**

Where audio-visual evidence of multiple learners is used, centres must ensure that each learner being assessed is clearly visible and can be identified by the Moderator.

The recorded evidence should allow the learner to demonstrate the learning outcomes clearly, but should only show work relevant to what is being assessed. For example, if a performance/participation is done as part of a group, the Moderator will need to be able to see how each learner being assessed has contributed and met the learning outcomes.

To help our Moderators to identify clearly when a particular learner is performing/participating we'd recommend including the following information:

- the exact start and finish times so that the Moderator can go straight to that spot on the tape/recording
- a running order list and a description of each learner
- information about where the performance/recorded evidence took place
- what type of audience they were performing to (if applicable).

Centres must also ensure that the camera and microphone are set up in a suitable place to ensure good quality audio. This will allow the Moderator to hear both the learner(s) and the Assessor (if applicable).

If learners are not clearly identified, NCFE may not be able to moderate or examine the work.

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## **Moderation**

Moderation is the process by which we confirm that assessment decisions in centres are:

- made by competent and qualified Assessors
- the product of sound and fair assessment practice
- recorded accurately and appropriately.

We do this through:

- internal moderation – which you carry out
  - external moderation – which we carry out through our External Moderators who, by supporting you, will make sure that assessments meet nationally agreed standards and that your quality assurance systems continue to meet our centre approval criteria.
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# Section 4

## Explanation of terms

**Explanation of terms**

This table explains how the terms used at Level 2 in the unit content are applied to this qualification (not all verbs are used in this qualification).

<b>Apply</b>	Link existing knowledge to new or different situations.
<b>Assess</b>	Consider information in order to make decisions.
<b>Classify</b>	Organise according to specific criteria.
<b>Compare</b>	Examine the subjects in detail looking at similarities and differences.
<b>Define</b>	State the meaning of a word or phrase.
<b>Demonstrate</b>	Show an understanding of the subject or how to apply skills in a practical situation.
<b>Describe</b>	Write about the subject giving detailed information.
<b>Differentiate</b>	Give the differences between two or more things.
<b>Discuss</b>	Write an account giving more than one view or opinion.
<b>Distinguish</b>	Show or recognise the difference between items/ideas/information.
<b>Estimate</b>	Give an approximate decision or opinion using previous knowledge.
<b>Explain</b>	Provide details about the subject with reasons showing how or why. Some responses could include examples.
<b>Give (positive and negative points...)</b>	Provide information showing the advantages and disadvantages of the subject.
<b>Identify</b>	List or name the main points. (Some description may also be necessary to gain higher marks when using compensatory marking).
<b>Illustrate</b>	Give clear information using written examples, pictures or diagrams.
<b>List</b>	Make a list of key words, sentences or comments that focus on the subject.
<b>Perform</b>	Do something (take an action/follow an instruction) which the question or task asks or requires.
<b>Plan</b>	Think about and organise information in a logical way. This could be presented as written information, a diagram, an illustration or other suitable format.
<b>Provide</b>	Give relevant information about a subject.
<b>Reflect</b>	Learners should look back on their actions, experiences or learning and think about how this could inform their future practice.

<b>Select</b>	Choose for a specific purpose.
<b>Show</b>	Supply sufficient evidence to demonstrate knowledge and understanding.
<b>State</b>	Give the main points clearly in sentences.
<b>Use</b>	Take or apply an item, resource or piece of information as asked in the question or task.

# Section 5

## General information

## **General information**

### **Equal opportunities**

NCFE fully supports the principle of equal opportunities and opposes all unlawful or unfair discrimination on the grounds of ability, age, colour, culture, disability, domestic circumstances, employment status, gender, marital status, nationality, political orientation, racial origin, religious beliefs, sexual orientation and social background. NCFE aims to ensure that equality of opportunity is promoted and that unlawful or unfair discrimination, whether direct or indirect, is eliminated both in its own employment practices and in access to its qualifications. A copy of our Diversity and Equality policy is available on the NCFE website.

### **Diversity, access and inclusion**

Our qualifications and associated assessments are designed to be accessible, inclusive and non-discriminatory. NCFE regularly evaluates and monitors the 6 diversity strands (gender, age, race, disability, religion, sexual orientation) throughout the development process as well as throughout the delivery, external moderation and external assessment processes of live qualifications. This ensures that positive attitudes and good relations are promoted, discriminatory language is not used and our assessment procedures are fully inclusive.

Learners who require reasonable adjustments or special consideration should discuss their requirements with their Tutor who should refer to our Reasonable Adjustments and Special Considerations policy for guidance.

For more information on the Reasonable Adjustments and Special Considerations policy please see the NCFE website.

## Feedback

Here at NCFE, we're continually looking to review and improve our portfolio of qualifications to make sure they are of a high standard and meeting the needs of both learners and employers.

In order to achieve this and to comply with the requirements of our regulator, Ofqual, we rely on the valuable feedback that you – our centres – provide us with.

For each NCFE qualification you deliver, we would be grateful if you could let us know the following:

- general feedback about the qualification and assessment
- whether the qualification is meeting its intended purpose
- the outcome for the learner – whether they have progressed to further education or into/within employment.

You can provide us with this information by emailing [qualificationfeedback@ncfe.org.uk](mailto:qualificationfeedback@ncfe.org.uk), giving us a call on 0191 239 8000, or responding to the next survey we send you. By doing this, you're playing an important role in helping us continue to develop and enhance our qualifications for the benefit of your learners.

## Contact us

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***\* To continue to improve our levels of customer service, telephone calls may be recorded for training and quality purposes.***