NCFE

Qualification specification

NCFE Level 3 Diploma in Customer Service

QN: 601/3974/2

This qualification is now withdrawn.

Contents

Summary of changes

This section summarises the changes to this qualification specification. Please check the qualification page on our website for the most recent version.

Version	Publication Date	Summary of amendments
v6.1	January 2020	Information regarding the <u>wellbeing and safeguarding</u> of learners added to Section 1 (page 16).
v7.0	October 2020	References to Apprenticeship Frameworks removed due to withdrawal.
v7.1	June 2022	Further information added to the <u>how the qualification is assessed</u> 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 <u>entry guidance</u> section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal. <u>Support handbook section</u> added to section 1 with information about how to access support handbooks.
v7.2	June 2023	Information regarding UCAS added to <u>Section 1 Things you need to know. Qualification Overview.</u>

Section 1

Qualification overview

Section 1
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 3 Diploma in Customer Service.

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

To ensure that you are 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 qualifications website.

If you advertise this qualification 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 3 Diploma in Customer Service.

The NCFE Level 3 Diploma in Customer Service is a combined knowledge and competence-based qualification.

This qualification is based on National Occupational Standards (NOS) and is a job-ready qualification which requires learners to demonstrate the skills and knowledge required to work in a specific industry. The qualification must be assessed in the workplace or in a realistic work environment (RWE) in accordance with the relevant assessment strategy requirements. For further information on the strategy please visit the qualifications page on the NCFE website.

Support handbook

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.

About this qualification

This is a regulated qualification. The regulated number for this qualification is 601/3974/2.

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

Things you need to know

- Qualification number (QN): 601/3974/2
- Aim reference: 60139742
- Total Qualification Time (TQT): 550
- Guided learning hours (GLH): 289
- Credit: 55
- UCAS: This qualification has been allocated UCAS points. Please refer to the UCAS website for further details of the points allocation and the most up-to-date information
- Level: 3
- Assessment requirements: internally assessed and externally moderated portfolio of evidence

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.

Aims and objectives of this qualification

This qualification gives learners the opportunity to develop the skills and knowledge needed to deliver customer service in a range of industries and contexts. Learners will understand what drives customer behaviour and what creates customer retention. Learners are also given the opportunity to explore excellence within customer service, dealing with more challenging scenarios such as complaints and stakeholder engagement.

The objective of this qualification is to accredit and develop learners' skills and knowledge so that they can operate in a wide range of customer service environments.

Entry guidance

This qualification is designed for individuals currently working in a customer service role.

Registration is at the discretion of the centre, in accordance with equality legislation, and should be made on the Portal.

There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 2 qualification.

This qualification is suitable for learners aged 16 and above.

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.

Achieving this qualification

To be awarded the NCFE Level 3 Diploma in Customer Service, learners must achieve a minimum of **55 credits**:

- a total of **31** credits from Group A
- a minimum of **15** credits from Group B
- a maximum of **9** credits can come from Group C

A minimum of 40 credits must be achieved at level 3 or above.

Group A mandatory units

- Unit 01   Organise and deliver customer service (5 credits)
- Unit 02   Understand the customer service environment (5 credits)
- Unit 03   Resolve customers' problems (4 credits)
- Unit 04   Principles of business (10 credits)
- Unit 05   Manage personal and professional development (3 credits)
- Unit 06   Understand customers and customer retention (4 credits)

Group B optional units

- Unit 07   Develop resources to support consistency of customer service delivery (5 credits)
- Unit 08   Use service partnerships to deliver customer service (3 credits)
- Unit 09   Resolve customers' complaints (4 credits)
- Unit 10   Gather, analyse and interpret customer feedback (5 credits)
- Unit 11   Monitor the quality of customer service interactions (5 credits)
- Unit 12   Communicate verbally with customers (3 credits)
- Unit 13   Communicate with customers in writing (3 credits)
- Unit 14   Promote additional products and/or services to customers (2 credits)
- Unit 15   Exceed customer expectations (3 credits)
- Unit 16   Deliver customer service whilst working on customers' premises (4 credits)
- Unit 17   Deliver customer service to challenging customers (3 credits)
- Unit 18   Develop customer relationships (3 credits)
- Unit 19   Support customer service improvements (3 credits)
- Unit 20   Support customers through real-time online customer service (3 credits)
- Unit 21   Use social media to deliver customer service (3 credits)
- Unit 22   Champion customer service (4 credits)
- Unit 23   Build and maintain effective customer relations (6 credits)
- Unit 24   Manage a customer service award programme (4 credits)
- Unit 25   Manage the use of technology to improve customer service (4 credits)
- Unit 26   Develop a social media strategy for customer service (5 credits)
- Unit 27   Support customers using self-service equipment (3 credits)
- Unit 28   Provide post-transaction customer service (5 credits)

Group C optional unis

- Unit 29   Negotiate in a business environment (4 credits)
- Unit 30   Promote equality, diversity and inclusion in the workplace (3 credits)
- Unit 31   Manage team performance (4 credits)

- Unit 32   Manage individuals' performance (4 credits)
- Unit 33   Collaborate with other departments (3 credits)
- Unit 34   Negotiating, handling objections and closing sales (4 credits)
- Unit 35   Obtaining and analysing sales-related information (4 credits)
- Unit 36   Buyer behaviour in sales situations (3 credits)
- Unit 37   Manage incidents referred to a contact centre (6 credits)
- Unit 38   Lead direct sales activities in a contact centre team (4 credits)
- Unit 39   Manage diary systems (2 credits)
- Unit 40   Contribute to the organisation of an event (3 credits)
- Unit 41   Provide reception services (3 credits)
- Unit 42   Buddy a colleague to develop their skills (3 credits)
- Unit 43   Employee rights and responsibilities (2 credits)
- Unit 44   Processing sales orders (2 credits)
- Unit 45   Bespoke Software (4 credits)

The learning outcomes and assessment criteria for each unit are provided in Section 3 (page 19).

To achieve the NCFE Level 3 Diploma in 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.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply. A Credit Certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)

Where the assessment strategy for a unit/qualification allow[s], it is essential that organisations wishing to operate an RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This will ensure that any competence achieved in this way will be sustained in real employment.

Progression opportunities

Learners who achieve this qualification could progress to:

- NCFE Level 3 Diploma in Management
- NCFE Level 3 Diploma in Business Administration
- NCFE Level 4 NVQ Diploma in Customer Service
- NCFE Level 4 NVQ Diploma in Business Administration

It may also be useful to learners studying qualifications in the following sector(s):

- Retail
- Hospitality and Catering
- Leisure, Travel and Tourism.

Progression to Higher Level Studies

This qualification aims to provide learners with a number of progression options, including higher level studies at university or FE colleges. The skills required to progress to higher academic studies are different from those required at Levels 1 and 2. Level 3 qualifications enable the development of these skills. Although there is no single definition of higher level learning skills, they include:

- checking and testing information
- supporting your points with evidence
- self-directed study
- self-motivation
- thinking for yourself
- analysing and synthesising information/materials
- critical thinking and problem solving
- working collaboratively
- reflecting upon learning and identifying improvements.

Level 3 criteria can require learners to **analyse**, **draw conclusions**, **interpret** or **justify**, which are all examples of higher level skills. This means that evidence provided for the portfolio will also demonstrate the development and use of higher level learning skills.

Barred units, equivalencies and exemptions

This qualification may contain barred units, equivalencies or exemptions. These will be identified in the summary for each unit.

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.

Credit transfer

Where a learner has already achieved a unit with credit, NCFE will recognise that prior learning and will allow the credit to be transferred onto a new qualification, provided that the units have the same Ofqual reference number.

Direct Claim Status

For more information about Direct Claim Status, please contact our Customer Support team on 0191 239 8000.

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 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 internally quality assured. This may be gained through experience and/or qualifications.

Resource requirements

The following document is essential reading for any centre involved in the delivery, assessment and administration of this qualification:

- Skills CFA Assessment Strategy
- e-Skills UK Assessment Strategy.

This document can be downloaded from the qualifications page on the NCFE website.

Support for learners

Learner's Evidence Tracking Log (LETL)

The LETL can help learners keep track of their work. LETLs 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 documents instead.

Support for centres

There are a number of documents available on the NCFE website that centres might find useful.

Qualification Support Packs

NCFE offers free Qualification Support Packs (QSPs) for many of our qualifications.

QSPs are a free resource that Tutors can use when planning and delivering an NCFE qualification. Within a QSP, Tutors will find a Scheme of Work, PowerPoint presentation and a wide range of tasks and worksheets to help learners consolidate their knowledge.

QSPs are not intended to provide full coverage of learning outcomes and assessment criteria, but the content is mapped to the qualification to ensure it is relevant and useful. If you would like to learn more, or to see which qualifications have QSPs then please visit the NCFE website.

Customer Support Guide

This explains everything you need to know, from how to apply to become an NCFE-approved centre to registering your learners and claiming their certificates, and everything in between. Centres must seek approval to offer a qualification. Only learners from approved centres can be certificated.

Reasonable Adjustments and Special Considerations Policy

This policy is aimed at our 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

This document is published in the spring for the forthcoming academic year.

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.

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.

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 development or selecting delivery materials.

Mapping to National Occupational Standards

National Occupational Standards (NOS) are owned by a Sector Skills Council (SSC) or Standard-Setting Body (SSB) and describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The units and structure of this qualification are based on the Skills CFA NOS for Management and Leadership.

Further information on the NOS used in this qualification can be found on the Skills CFA website www.skillscfa.org

Mapping to Personal Learning and Thinking Skills (PLTS)

This qualification has been mapped to the PLTS framework. Skills CfA has produced a mapping document which you can find on the qualifications page on the NCFE website.

Section 2

Assessment and moderation

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Assessment and moderation

How the qualification is assessed

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

This qualification must be assessed in line with Skills CFA Assessment Strategy and e-skills uk Assessment Strategy.

The NCFE Level 3 Diploma in Customer Service is internally assessed.

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.

Internal assessment

Each candidate must create a portfolio of evidence which demonstrates achievement of all the learning outcomes and assessment criteria associated with each unit. On completion of each unit candidates 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 3 (page 19).

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

- Assessor observation
- witness testimony
- product evidence
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- candidate and peer reports
- Recognition of Prior Learning (RPL).

Evidence may be drawn from actual or simulated situations, where appropriate. Please refer to the Skills CFA Assessment Strategy for further information. This can be found on the qualifications page on the NCFE website.

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they are 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 candidates have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if candidates have been successful. Assessors are also responsible for supporting candidates 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.

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.

The Internal Moderator provides the vital link between the Assessors and the External Moderator and acts as the centre's quality assurance agent.

If you'd like to know more about the responsibilities of Assessors and Internal and External Moderators please refer to our Customer Support Guide.

Section 3

Structure and content

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Structure and content

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
- credit value
- 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)
- guidance for developing assessment (an explanation of technical terms and the depth and breadth
  of coverage of the unit)
- assessment guidance (types of evidence for internal assessment)

The regulators' unit number is indicated in brackets for each unit (eg 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.

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

Unit summaries

Unit 01 Organise and deliver customer service (L/506/2150)

This unit aims to equip learners with knowledge of the methods of promotion, the organisation and the differences between customers' wants, needs and expectations. Learners will be able to plan the 'customer journey' and be able to deliver customer service.

Guided learning hours: 27
Credit value: 5
Level: 3
This unit is **mandatory**

Unit 02 Understand the customer service environment (Y/506/2152)

The purpose of this unit is to increase the learners' understanding of the concepts and practices underpinning customer service delivery. Learners will gain knowledge of the structure of customer service and the relationship between customer service and a brand.

Guided learning hours: 40
Credit value: 5
Level: 3
This unit is **mandatory**

Unit 03 Resolve customers' problems (K/506/2169)

The aim of this unit is to equip learners with the ability to identify and resolve customers' problems satisfactorily, following organisational policy and procedures.

Guided learning hours: 19
Credit value: 4
Level: 3
This unit is **mandatory**

Unit summaries (cont'd)

Unit 04 Principles of business (D/506/1942)

This unit aims to provide learners with an understanding of the principles of business. Learners will have the opportunity to increase their knowledge of business markets and how this reflects on organisational goals. Learners will also understand business innovation, financial management and budgeting, as well as an understanding of sales, marketing and the associated processes.

Guided learning hours: 74
Credit value: 10
Level: 3
This unit is **mandatory**

Unit 05 Manage personal and professional development (T/506/2952)

This unit will enable learners to identify personal and professional development and to fulfil and maintain a personal and professional development plan.

Guided learning hours: 12
Credit value: 3
Level: 3
This unit is **mandatory**

Unit 06 Understand customers and customer retention (J/506/2910)

This unit provides learners with an understanding of the concept of 'customer experience.' Learners will also understand the benefits of customer retention and customer loyalty, as well as gain knowledge of how to measure and analyse performance data.

Guided learning hours: 35
Credit value: 4
Level: 3
This unit is **mandatory**

Unit summaries (cont'd)

Unit 07 Develop resources to support consistency of customer service delivery (Y/506/2166)

This unit is designed to equip learners with the ability to create a customer service knowledge base and to be able to develop customer service resource materials in line with organisational requirements.

Guided learning hours: 21
Credit value: 5
Level: 3
This unit is **optional**

Unit 08 Use service partnerships to deliver customer service (D/506/2167)

This unit aims to provide learners with an understanding of the principles of building relationships with customer service partnerships which will enable them to establish procedures acceptable to all members of the partnership.

Guided learning hours: 20
Credit value: 3
Level: 3
This unit is **optional**

Unit 09 Resolve customers' complaints (R/506/2151)

The aim of this unit is to equip learners with the ability to resolve customers' complaints, agreeing solutions with customers following organisational policy and procedures.

Guided learning hours: 22
Credit value: 4
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 10 Gather, analyse and interpret customer feedback (D/506/2170)

This unit is designed to equip learners with the ability to gather, analyse and interpret customer feedback in order to recommend improvements to customer service.

Guided learning hours: 24
Credit value: 5
Level: 3
This unit is **optional**

Unit 11 Monitor the quality of customer service interactions (K/506/2172)

This unit is designed to equip learners with the techniques for monitoring the quality of customer interactions. Learners will be able to use suitable techniques to gather the required information and provide feedback on performance to colleagues.

Guided learning hours 27
Credit value: 5
Level: 3
This unit is **optional**

Unit 12 Communicate verbally with customers (D/506/2119)

In this unit learners will have the opportunity to increase their knowledge of communication techniques. Learners will understand how to listen effectively, identify and adapt their communication style in order to offer the best customer service.

Guided learning hours: 14
Credit value: 3
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 13 Communicate with customers in writing (T/506/2126)

In this unit learners will have the opportunity to increase their knowledge of the different forms of written communication. Learners will be able to select the most appropriate method of communication and produce clearly written documents that meet the needs of the customers.

Guided learning hours: 20
Credit value: 3
Level: 2
This unit is **optional**

Unit 14 Promote additional products and/or services to customers (L/506/2133)

This unit is designed to develop the learners understanding of the promotional aspect to customer service. Learners will be able to identify opportunities to promote additional products in line with organisational procedures.

Guided learning hours: 14
Credit value: 2
Level: 2
This unit is **optional**

Unit 15 Exceed customer expectations (Y/506/2135)

This unit focuses on the learners' ability to exceed customer expectations. Learners will be able to identify the differences between customer expectation and service needs and make offers to customers within the limits of their authority.

Guided learning hours: 15
Credit value: 3
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 16 Deliver customer service whilst working on customers' premises (T/506/2143)

This unit aims to develop the learners' knowledge of the preparation, attitude and standards expected when visiting customers' premises. Learners will be able to deliver effective customer service, showing consideration towards the customer and their premises.

Guided learning hours: 20
Credit value: 4
Level: 2
This unit is **optional**

Unit 17 Deliver customer service to challenging customers (F/506/2159)

This aim of this unit is to provide learners with an understanding of how to deal with challenging customers. Learners will be able to describe the different techniques that can be applied when dealing with challenging customers, agreeing on a way forward that meets the needs of both the customer and organisation.

Guided learning hours: 16
Credit value: 3
Level: 2
This unit is **optional**

Unit 18 Develop customer relationships (Y/506/2149)

This unit is designed to assess the learners understanding of how to develop customer relationships.

Guided learning hours: 18
Credit value: 3
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 19 Support customer service improvements (T/506/2160)

This unit aims to enable learners to identify the different sources of information required to support customer service improvements and be able to make recommendations based on the information gathered.

Guided learning hours: 12
Credit value: 3
Level: 2
This unit is **optional**

Unit 20 Support Customers through real-time online customer service (A/506/2161)

This unit is designed to equip learners with the ability to support customers using an online system. Learners will be able to communicate effectively with customers and provide support that will meet their needs.

Guided learning hours: 15
Credit value: 3
Level: 2
This unit is **optional**

Unit 21 Use social media to deliver customer service (J/506/2163)

This unit will enable learners to understand social media platforms and how they can be used within the customer service role. Learners will be able to deal with customer queries and respond in line with organisational procedures.

Guided learning hours: 18
Credit value: 3
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 22 Champion Customer Service (D/506/2153)

The purpose of this unit is to enable learners to champion customer service and be able to identify the scope for improvements to customer service.

Guided learning hours: 17
Credit value: 4
Level: 4
This unit is **optional**

Unit 23 Build and maintain effective customer relations (R/506/2179)

This unit aims to provide learners with an understanding of the principles of effective customer relations and enable them to develop effective relationships with customers.

Guided learning hours: 25
Credit value: 6
Level: 4
This unit is **optional**

Unit summaries (cont'd)

Unit 24 Manage a customer service award programme (L/506/2181)

In this unit learners will have the opportunity to plan, manage and promote a customer service award programme. Learners will design objectives for the award and develop motivational skills to encourage team members.

Guided learning hours: 15
Credit value: 4
Level: 4
This unit is **optional**

Unit summaries (cont'd)

Unit 25 Manage the use of technology to improve customer service (Y/506/2183)

In this unit the learners will have the opportunity to increase their knowledge of technology to identify improvements to service delivery and implement change.

Guided learning hours: 14
Credit value: 4
Level: 4
This unit is **optional**

Unit 26 Develop a social media strategy for customer service (D/506/2962)

This unit will enable learners to identify opportunities to develop a customer social media strategy, evaluating the advantages and drawbacks, and be able to promote the benefits of networking.

Guided learning hours: 16
Credit value: 5
Level: 4
This unit is **optional**

Unit 27 Support customers using self-service equipment (H/506/2977)

The aim of this unit is to increase the learners understanding of how to use self-service equipment and to be able to identify and support when customers need assistance using the equipment.

Guided learning hours: 18
Credit value: 3
Level: 2
This unit is **optional**

Unit 28 Provide post-transaction customer service (K/506/2978)

The aim of this unit is to provide learners with an understanding of the advantages and disadvantages of post-transaction activity.   The learners will be able to provide a post-transaction service to customers in line with organisational procedures.

Guided learning hours: 22
Credit value: 5
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 29 Negotiate in a business environment (H/506/1912)

This unit aims to provide learners with an understanding of the principles and techniques of negotiation skills. Learners will use different negotiation techniques to carry out business negotiation, complying with both organisational policy and procedure and legal and ethical requirements.

Guided learning hours: 18
Credit value: 4
Level: 3
This unit is **optional**

Unit 30 Promote equality, diversity and inclusion in the workplace (T/506/1820)

This unit aims to enable learners to support equality, diversity and inclusion in the workplace by increasing their understanding of personal and organisational factors.

Guided learning hours: 15
Credit value: 3
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 31 Manage Team performance (A/506/1821)

This purpose of this unit is to develop the learners understanding of team performance management. Learners will be able to allocate and assure the quality of work, and manage communications within a team.

Guided learning hours: 21
Credit value: 4
Level: 3
This unit is **optional**

Unit 32 Manage Individuals' performance (J/506/1921)

This unit aims to develop the learners understanding of underperformance in the workplace, enabling them to manage an individuals' performance.

Guided learning hours: 20
Credit value: 4
Level: 3
This unit is **optional**

Unit 33 Collaborate with other departments (M/506/1931)

This aim of this unit is to enable learners to effectively collaborate with other departments.

Guided learning hours: 14
Credit value: 3
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 34 Negotiating, handling objections and closing sales (F/502/8612)

The aim of this unit is to equip learners with the knowledge of negotiation skills and how to handle sales objections. Learners will be able to establish the nature of the objection, promote the benefits of the product and service to overcome objections and close the sale.

Guided learning hours: 22
Credit value: 4
Level: 3
This unit is **optional**

Unit 35 Obtaining and analysing sales-related information (R/502/8615)

The aim of this unit is to equip learners with the knowledge and ability to obtain sales-related information about customers, markets and competitors. Learners will be able to use tools and methods to analyse sales-related information to the target audience within the agreed timescale and budget

Guided learning hours: 24
Credit value: 4
Level: 3
This unit is **optional**

Unit 36 Buyer behaviours in sales situations (K/502/8622)

The aim of this unit is to equip learners with the knowledge of different models of buyer behaviour and the impact this has on the sales cycle and decision making process

Guided learning hours: 27
Credit value: 3
Level: 3
This unit is **optional**

Unit 37 Manage incidents referred to a contact centre (K/503/0418)

The aim of this unit is to equip learners with the knowledge of incident management. Learners will respond to incoming contacts and deal with queries and complaints relating to incident handling, providing support to colleagues

Guided learning hours: 30
Credit value: 6
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 38 Lead direct sales activities in a contact centre team (D/503/0397)

This unit aims to provide learners with an understanding of the principles and techniques of direct sales and to be able to carry out sales, monitor sales performance and analyse and report sales data

Guided learning hours: 8
Credit value: 4
Level: 3
This unit is **optional**

Unit 39 Manage diary systems (L/506/1807)

This unit aims to provide learners with an understanding of how to manage diary systems and the importance of maintaining confidentiality

Guided learning hours: 12
Credit value: 2
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 40 Contribute to the organisation of an event (L/506/1869)

This purpose of this unit is to increase learners' understanding of how to organize an event. Learners will be able to set up an event, organize resources needed and evaluate post-event actions

Guided learning hours: 23
Credit value: 3
Level: 2
This unit is **optional**

Unit 41 Provide reception duties (H/506/1814)

The aim of this unit is to equip learners with the knowledge of the receptionist role and how to provide a reception service to visitors in accordance with organizational standards

Guided learning hours: 15
Credit value: 3
Level: 2
This unit is **optional**

Unit 42 Buddy a colleague to develop their skills (M/506/1895)

The aim of this unit is to equip learners with the knowledge and ability to develop their skills to be able to support a colleague and give feedback on their performance

Guided learning hours: 19
Credit value: 3
Level: 2
This unit is **optional**

Unit 43 Employee rights and responsibilities (L/506/1905)

The aim of this unit is to equip learners with the knowledge to understand their rights and responsibilities in the workplace, employer expectation and the laws which protect their safety

Guided learning hours: 16
Credit value: 2
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 44 Processing sales orders (M/502/8587)

The aim of this unit is to provide learners with an understanding of how to process sales orders. Learners will be able to identify customer requirements following organisational procedures and process orders using different methods of payment.

Guided learning hours: 17
Credit value: 2
Level: 2
This unit is **optional**

Unit 45 Bespoke software (J/502/4397)

The aim of this unit is to equip learners with the ability to use bespoke software, using the appropriate techniques and tools to edit and process information. Learners will use the software effectively to create and modify appropriate and present the information in an appropriate format.

Guided learning hours: 30
Credit value: 4
Level: 3
This unit is **optional**

Unit 01 Organise and deliver customer service (L/506/2150)

The learner will:

1   Understand how to organise customer service delivery

The learner can:

1.1   Explain how different methods of promoting products and/or   services impact on customer
         service delivery
1.2   Explain who should be involved in the organisation of customer service delivery
1.3   Explain the importance of differentiating between customers' wants, needs and expectations
1.4   Explain different ways of segmenting customer groups
1.5   Explain how customer segmentation is used in organising customer service delivery
1.6   Explain how to analyse the 'customer journey'

The learner will:

2   Be able to plan the delivery of customer service

The learner can:

2.1   Identify customers' needs and expectations
2.2   Map the 'customer journey'
2.3   Confirm that systems and structures are in place to enable the delivery of agreed standards of
         customer service
2.4   Prepare the resources needed to deliver products and/or services to different types of customers
2.5   Plan how to deal with unexpected additional workloads
2.6   Allocate priorities to address points of service failure

**Unit 01 Organise and deliver customer service (L/506/2150)
         (cont'd)**

The learner will:

3   Be able to deliver customer service

The learner can:

3.1   Take steps to ensure that the needs of customers are balanced with organisational objectives
3.2   Agree realistic and achievable actions with customers
3.3   Identify areas for improvement in their own customer service delivery
3.4   Adapt their own customer service delivery to meet customers' changing expectations

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Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Methods of promoting** of products and/or services could include but are not exclusive to advertising, eg TV, online, press, flyers, in store messaging and social media campaigns.
1.4   **Segmentation** is the technique used to enable a business to better target its products at the right customers.
1.6   **Customer journey** eg points of transaction, points of contact and response mechanisms for each stage of the journey.
2.3   **Systems and structures** – the procedures, people, and resources needed to deliver customer service.
2.4   **Resources** can include but are not exclusive to staff, promotional materials and equipment.
2.6   **Service failure** - a dissatisfactory service experience.

**Unit 02 Understand the customer service environment
        (Y/506/2152)**

The learner will:

1   Understand the concepts and practices underpinning customer service delivery

The learner can:

1.1   Explain the value of customer service as a competitive tool
1.2   Explain the process of mapping the customer journey and its importance in delivering effective
         customer service
1.3   Describe techniques used to identify service failures
1.4   Explain the concept and importance of the service profit chain
1.5   Describe methods of measuring organisational effectiveness in the delivery of customer service

The learner will:

2   Understand the relationship between customer service and a brand

The learner can:

2.1   Explain the importance of a brand to customers and to an organisation
2.2   Explain how branding can influence customers' perception of an organisation and its products
         and/or services
2.3   Explain the potential impact of good and poor customer service on a brand

Unit 02 Understand the customer service environment (Y/506/2152) (cont'd)

The learner will:

3   Understand the structure of customer service

The learner can:

3.1   Explain the features of different customer service models and customer service standards
3.2   Explain the relationship between customer service and operational areas of an organisation
3.3   Explain the relationship between customer service and continuous improvement processes
3.4   Explain the costs and benefits of customer service to an organisation

3.5   Explain the impact of organisational values on how customers create their expectations
3.6   Explain how organisational values impact on meeting customer expectations

The learner will:

4   Understand the implications of legislation on customer service delivery

The learner can:

4.1   Explain the implications of consumer-related legislation on customer service delivery
4.2   Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

**Unit 02 Understand the customer service environment
     (Y/506/2152) (cont'd)**

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Competitive** is as good as or better than others of a comparable nature.
1.3   **Service failure** is where the customer service standard and/or customer expectations have not been met.
1.4   **Service profit chain** is the relationship between profitability, customer loyalty, and employee satisfaction, loyalty, and productivity.
2.1   **Brand** is a type of product /service provided by a particular company under a specific name.
4.1   **Consumer-related legislation** may include:
- Sales of Goods Act 1979
- Consumer Protection Act 1987

Unit 03 Resolve customers' problems (K/506/2169)

The learner will:

1   Understand the monitoring and resolution of customers' problems

The learner can:

1.1   Assess the suitability of a range of techniques for monitoring customer problems
1.2   Explain how to use the resolution of customers' problems to improve products and/or services
1.3   Explain how the successful resolution of customers' problems contributes to customer loyalty and
        enhanced business performance
1.4   Explain the features of negotiating techniques used to resolve customers' problems

The learner will:

2   Be able to deal with customers' problems

The learner can:

2.1   Confirm the nature and cause of customers' problems
2.2   Explain when customers' problems should be treated as complaints
2.3   Explain the benefits to customers and the organisation of the options available to solve problems
2.4   Explain the drawbacks to customers and the organisation of the options available to solve
        problems
2.5   Explain to customers the options for resolving their problems
2.6   Agree solutions that meet customers' and organisational requirements within their own levels of
        authority
2.7   Inform colleagues of the nature of problems and actions taken
2.8   Evaluate the effectiveness of the resolution of customers' problems
2.9   Adhere to organisational policies and procedures, legal and ethical requirements when dealing
        with customers' problems

Unit 03 Resolve customers' problems (K/506/2169) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Monitoring techniques** may include, but are not limited to:
- record keeping
- customer contact systems
- emails
- letters
- task-specific documents.

1.4   **Negotiating techniques** may include but are not exclusive to:
- compensation
- replacement
- cost reduction
- upgrade
- standard communication
- referral to specialist team.

Unit 04 Principles of business (D/506/1942)

The learner will:

1   Understand business markets

The learner can:

1.1   Explain the characteristics of different business markets
1.2   Explain the nature of interactions between businesses within a market
1.3   Explain how an organisation's goals may be shaped by the market in which it operates
1.4   Describe the legal obligations of a business

The learner will:

2   Understand business innovation and growth

The learner can:

2.1   Define business innovation
2.2   Explain the uses of models of business innovation
2.3   Identify sources of support and guidance for business innovation
2.4   Explain the process of product or service development
2.5   Explain the benefits, risks and implications associated with innovation

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The learner will:

3   Understand financial management

The learner can:

3.1   Explain the importance of financial viability for an organisation
3.2   Explain the consequences of poor financial management
3.3   Explain different financial terminology

Unit 04 Principles of business (D/506/1942) (cont'd)

The learner will:

4   Understand business budgeting

The learner can:

4.1   Explain the uses of a budget
4.2   Explain how to manage a budget

The learner will:

5   Understand sales and marketing

The learner can:

5.1   Explain the principles of marketing
5.2   Explain a sales process
5.3   Explain the features and uses of market research
5.4   Explain the value of a brand to an organisation
5.5   Explain the relationship between sales and marketing

There is no assessment guidance available for this unit.

Unit 05 Manage personal and professional development (T/506/2952)

The learner will:

1   Be able to identify personal and professional development
        requirements

The learner can:

1.1   Compare sources of information on professional development trends and their validity
1.2   Identify trends and developments that influence the need for professional development
1.3   Evaluate their own current and future personal and professional development needs relating to
        the role, the team and the organisation

The learner will:

2   Be able to fulfil a personal and professional development
        plan

The learner can:

2.1   Evaluate the benefits of personal and professional development
2.2   Explain the basis on which types of development actions are selected
2.3   Identify current and future likely skills, knowledge and experience needs using skills gap analysis
2.4   Agree a personal and professional development plan that is consistent with business needs and
        personal objectives
2.5   Execute the plan within the agreed budget and timescale
2.6   Take advantage of development opportunities made available by professional networks or
        professional bodies

Unit 05 Manage personal and professional development (T/506/2952) (cont'd)

The learner will:

3   Be able to maintain the relevance of a personal and professional development plan

The learner can:

3.1   Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
3.2   Obtain feedback on performance from a range of valid sources
3.3   Review progress toward personal and professional objectives
3.4   Amend the personal and professional development plan in the light of feedback received from others

There is no assessment guidance available for this unit.

Unit 06 Understand customers and customer retention (J/506/2910)

The learner will:

1   Understand Customer Relationship Management (CRM)

The learner can:

1.1   Explain the concept of the 'customer experience'
1.2   Explain different methods of segmenting and characterising customers
1.3   Explain the purpose and scope of CRM
1.4   Describe the features of an effective CRM system
1.5   Explain the uses of CRM data in customer service delivery

The learner will:

2   Understand customer retention

The learner can:

2.1   Explain the term customer retention
2.2   Explain the benefits of customer retention to an organisation
2.3   Explain the factors that influence customer retention
2.4   Describe techniques used to attract and retain customers
2.5   Explain how to assess the extent of customer loyalty
2.6   Explain the factors involved in customer recovery

The learner will:

3   Understand the measurement of customer satisfaction

The learner can:

3.1   Describe techniques used to analyse performance data
3.2   Explain the factors to be taken into account in setting performance targets and objectives
3.3   Explain the features and uses of a range of techniques to measure customer satisfaction

Unit 06 Understand customers and customer retention (J/506/2910) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.2   **Segmenting and characterising customers** can be based on a range of factors, including:
- age
- gender
- employment status
- marital status
- home ownership.

1.3   **Customer relationship management** may be through software applications or paper-based systems.

3.1   **Performance data** could include but not be exclusive to:

- number of complaints
- number of returns
- sales targets.

3.3   **Techniques to measure customer satisfaction** may include but are not exclusive to feedback forms, surveys and mystery shoppers.

Unit 07 Develop resources to support consistency of customer service delivery (Y/506/2166)

The learner will:

1   Understand how knowledge resources are used to support customer service delivery

The learner can:

1.1   Explain the structure of a customer service knowledge base
1.2   Explain the uses of a customer service knowledge base
1.3   Explain the use of customers' frequently asked questions to support customer service delivery
1.4   Explain the input and update routines for adding to the knowledge base
1.5   Explain the content requirements of resource materials and how they should be expressed

The learner will:

2   Be able to create and maintain a customer service knowledge base

The learner can:

2.1   Identify the information that should be included in a customer service knowledge base
2.2   Confirm that a knowledge base is kept up to date
2.3   Promote the contents and use of a knowledge base

The learner will:

3   Be able to develop customer service resource materials

The learner can:

3.1   Describe the types of questions frequently asked by customers
3.2   Identify the types of resources needed to support customer service delivery from an analysis of customer needs
3.3   Identify who will use the resources and in what way
3.4   Develop resources that meet organisational requirements
3.5   Communicate the availability and nature of the resources to those who will use them

Unit 07 Develop resources to support consistency of customer service delivery (Y/506/2166) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   Evidence for this unit should be in line with organisational policies and procedures.
1.5   **Content requirements of resource materials** In line with organisational policies, in line with standards for house style and meeting objectives.

Unit 08 Use service partnerships to deliver customer service (D/506/2167)

The learner will:

1   Understand the use of a service partnership in customer service delivery

The learner can:

1.1   Explain the roles and responsibilities of the partners involved in a service chain
1.2   Explain the advantages and limitations of using a service partnership
1.3   Explain the use and value of formal and informal service level agreements

The learner will:

2   Understand ways of building relationships within a customer service partnership

The learner can:

2.1   Describe effective communication methods for dealing with service partners
2.2   Explain how to develop positive relationships with service partners
2.3   Describe negotiating techniques for dealing with service partners
2.4   Describe actions that can be taken to resolve any conflict of interest with service partners

Unit 08 Use service partnerships to deliver customer service (D/506/2167) (cont'd)

The learner will:

3   Be able to deliver customer service within a customer service partnership

The learner can:

3.1   Identify the levels of authority that exist within a service partnership
3.2   Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery
3.3   Establish service procedures that are acceptable to all members of a service partnership
3.4   Agree with service partners priorities and resolutions relating to conflicts of interest
3.5   Identify areas for improvement from the analysis of a range of sources of information

Unit 08 Use service partnerships to deliver customer service (D/506/2167) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Service chain** is sequence of services where, for each subsequent service, occurrence of the first action/service is necessary for the occurrence of the second action/service.

1.2   **Service partnership** can be formed when a minimum of two organisations or two departments of the same organisation combine in order to provide more effective customer service.

1.3   **Service level agreement (SLA)** is part of a service contract where the service is formally defined.

2.1   **Communication methods** may include, but are not exclusive to:
- written
- email
- letters
- verbal
- face to face
- telephone.

2.3   **Negotiating techniques** may include but are not exclusive to:
- compensation
- replacement
- cost reduction
- upgrade
- standard communication
- referral to specialist team.

3.5   **Sources of information** may include, but are not limited to:
- internal customers
- external customers
- quality reports
- sales analysis.

Unit 09 Resolve customers' complaints (R/506/2151)

The learner will:

1   Understand the monitoring and resolution of customers' complaints

The learner can:

1.1   Assess the suitability of a range of monitoring techniques for customers' complaints
1.2   Explain how to identify those complaints that should prompt a review of the service offer and service delivery
1.3   Explain negotiating techniques used to resolve customers' complaints
1.4   Explain conflict management techniques used in dealing with upset customers
1.5   Explain organisational procedures for dealing with customer complaints
1.6   Explain when to escalate customers' complaints
1.7   Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
1.8   Explain the advantages and limitations of offering compensation or replacement products and/or services

The learner will:

2   Be able to deal with customers' complaints

The learner can:

2.1   Confirm the nature, cause and implications of customers' complaints
2.2   Take personal responsibility for dealing with complaints
2.3   Communicate in a way that recognises customers' problems and understands their points of view
2.4   Explain the advantages and limitations of different complaint response options to customers
2.5   Explain the advantages and limitations of different complaint response options to the organisation
2.6   Keep customers informed of progress
2.7   Agree solutions with customers that address the complaint and which are within the limits of their own authority
2.8   Record the outcome of the handling of complaints for future reference
2.9   Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

Unit 09 Resolve customers' complaints (R/506/2151) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Monitoring techniques** may include, but are not limited to:
- record keeping
- customer contact systems
- emails
- letters
- task-specific documents.

1.3   **Negotiating techniques** may include, but are not exclusive to:
- compensation
- replacement
- cost reduction
- upgrade
- standard communication
- referral to specialist team.

1.4   **Conflict management techniques** may include, but are not limited to:
- standard communication
- referral to specialist team
- explanation at source
- 'second facing' at source.

1.5   **Organisational procedures** may include, but are not limited to:
- explanation at source
- 'second facing' at source
- compensation
- replacement
- cost reduction
- upgrade
- standard communication
- referral to specialist team.

Unit 10 Gather, analyse and interpret customer feedback (D/506/2170)

The learner will:

1   Understand how to gather, analyse and interpret customer feedback

The learner can:

1.1   Describe methods of collecting data for customer research
1.2   Explain random sampling techniques used to collect data
1.3   Explain how to evaluate bias in non-random samples
1.4   Explain the principles of questionnaire design
1.5   Assess the suitability of a range of techniques to analyse customer feedback
1.6   Explain techniques used to monitor the quality of data collected
1.7   Explain the use of software to record and analyse customer feedback
1.8   Explain the validation issues associated with customer feedback
1.9   Explain the importance of anonymising comments from customers who do not wish to be identified

The learner will:

2   Be able to plan the collection of customer feedback on customer service issues

The learner can:

2.1   Identify the objectives of collecting customer feedback
2.2   Justify the reasons for selecting different data collection methods
2.3   Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe

Unit 10 Gather, analyse and interpret customer feedback (D/506/2170) (cont'd)

The learner will:

3   Be able to gather customer feedback

The learner can:

3.1   Collect customer feedback using the sampling frame identified in a customer service plan
3.2   Record data in a way that makes analysis straightforward
3.3   Verify that all data is handled in line with legal, organisational and ethical policies and procedures

The learner will:

4   Be able to analyse and interpret customer feedback to recommend improvements

The learner can:

4.1   Use data analysis methods to identify patterns and trends in customer feedback
4.2   Use the findings of a data analysis to identify areas for improvement to customer service
4.3   Present the findings of an analysis in the agreed format
4.4   Recommend improvements in response to the findings of an analysis

Unit 10 Gather, analyse and interpret customer feedback (D/506/2170) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.3   **Bias** refers to inclination or prejudice for or against.

1.5   **Techniques to analyse customer feedback** may include:

- verifying data
- identifying over-arching themes
- highlighting 'quick wins' and 'red alerts.'

1.6   **Techniques to monitor the quality of data collected** may include:
- sampling
- monitoring
- review of methods used.

1.8   A **validation issue** is something that affects the accuracy of data.

1.9   **Anonymising comments** refers to ensuring that they do not contain information which reveals someone's identity.

2.2   **Data collection methods** could include,
- surveys
- monitoring social media
- comments boxes
- email/contact forms.

3.2   Record data In line with organisational procedures.

4.1   **Data analysis methods** (for quantitative and qualitative data), eg spreadsheet, software, manual analysis.

Unit 11 Monitor the quality of customer service interactions (K/506/2172)

The learner will:

1   Understand how to monitor the quality of customer service interactions

The learner can:

1.1   Describe techniques for monitoring the quality of customer service interactions
1.2   Explain organisational procedures and guidelines for customer service delivery
1.3   Explain the advantages and limitations of different methods for monitoring the quality of customer
         service interactions
1.4   Explain how to construct a representative sample of customer service interactions for monitoring
         purposes
1.5   Explain how data protection legislation applies to monitoring the quality of customer service
         interactions
1.6   Explain how monitoring actions taken can identify possible improvements in customer service
         interactions
1.7   Explain techniques to gather customer feedback

The learner will:

2   Be able to prepare to monitor the quality of customer service interactions

The learner can:

2.1   Identify the criteria against which the quality of customer service interactions will be monitored
2.2   Specify a sampling frame that would provide information to meet monitoring objectives
2.3   Select monitoring techniques that are capable of collecting the required information
2.4   Ensure that staff and customers are made aware of the fact that they will be monitored

Unit 11 Monitor the quality of customer service interactions (K/506/2172) (cont'd)

The learner will:

3   Be able to monitor the quality of customer service interactions

The learner can:

3.1   Monitor the quality of customer service interactions with minimal disruption to business
3.2   Assess the quality of customer service interactions against agreed criteria
3.3   Identify patterns and trends in colleagues' performance
3.4   Give constructive feedback to colleagues on the quality of customer service interactions

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Monitoring techniques** may include, but are not limited to:
- record keeping
- customer contact systems
- emails
- letters
- task-specific documents.

2.3   **Monitoring techniques** may include, but are not limited to:
- record keeping
- customer contact systems
- emails
- letters
- task-specific documents.

Unit 12 Communicate verbally with customers (D/506/2119)

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

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The learner will:

2   Be able to use customer service language to communicate with customers

The learner can:

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
2.8   Maintain organisational standards of behaviour and communication when interacting with customers
2.9   Check that customers have understood what has been communicated
2.10   Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

Unit 12 Communicate verbally with customers (D/506/2119) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.3   **Customer service language** may include phrases such as:
- 'my pleasure'
- 'no problem'
- 'have a good day'
- 'thank you for your custom.'#

1.4   **Questioning techniques** may include, but is not exclusive to:
- open
- closed
- verbal
- written
- probing
- clarification.

1.5   A **verbal signal** is a phrase or statement said by the customer.

1.6   A **non-verbal signal** is the body language of the customer.

Unit 13 Communicate with customers in writing (T/506/2126)

The learner will:

1   Understand how to communicate with customers in writing

The learner can:

1.1   Explain why it is necessary to use different forms of written communication for different purposes
1.2   Describe practices for producing different forms of written communications
1.3   Describe the potential benefits and limitations associated with communicating with customers in writing
1.4   Explain the implications of confidentiality and data protection in communicating with customers in writing

The learner will:

2   Be able to plan written communications to customers

The learner can:

2.1   Identify the objective(s) of the communication
2.2   Gather the information needed to draft the communication
2.3   Select the form of written communication that is most likely to lead to customer satisfaction within the service offer

The learner will:

3   Be able to communicate with customers in writing

The learner can:

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

Unit 13 Communicate with customers in writing (T/506/2126) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Written communication** may include letter, email, online forum etc.

1.4   **Implications,** including those of a legal nature

2.3   **Service offer** defines the extent and limits of the customer service that an organisation is offering

Unit 14 Promote additional products and/or services to customers (L/506/2133)

The learner will:

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

The learner can:

1.1	Describe organisational policies and procedures on the promotion of additional products and/or services
1.2	Explain the importance of keeping product/service knowledge up to date
1.3	Explain how to match products and/or services to customer needs
1.4	Describe techniques to promote additional products and/or services

The learner will:

2   Be able to promote additional products and/or services to customers

The learner can:

2.1	Identify opportunities to promote additional products and/or services that are likely to improve the customer experience
2.2	Promote the benefits of additional products and/or services that are likely to be of interest to customers
2.3	Provide information to customers that will help them to decide whether to select additional products and/or services
2.4	Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

Unit 14 Promote additional products and/or services to customers (L/506/2133) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.4   **Techniques** may include but are not exclusive to:
- verbal communication
- written communication
- product placement.

2.1   The **customer experience** can be in relation to both internal and external customers.

Unit 15 Exceed customer expectations (Y/506/2135)

The learner will:

1   Understand how to exceed customer expectations

The learner can:

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

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The learner will:

2   Be able to exceed customer expectations

The learner can:

2.1   Identify differences between customers' expectations and needs and the service offer
2.2   Explain the service offer clearly and concisely to customers
2.3   Identify options that offer added value without affecting other customers adversely
2.4   Make offers to customers within their own authority levels
2.5   Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
2.6   Record agreements made and actions taken

Unit 15 Exceed customer expectations (Y/506/2135) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.2   **Legislation** could include:
- Sale of goods Act 1979 (as amended)
- age restrictive legislation covering for example the sale of:
  - tobacco - Children and Young Persons
    (Protection from Tobacco) Act 1991 and Children and Young Person (Sale of Tobacco) Order 2007
  - alcohol products - Licensing Act 2003
  - spray paint – Anti Social Behaviour Act 2003
  - knives – Criminal Justice Act 1988 etc.
- Equality Act 2010
- H&S at Work Act 1974

  Organisational policies will be specific to the organisation but could include:
- time in which goods can be returned (returns policy)
- gift receipts
- condition in which goods can be returned
- validity of gift vouchers – expiry date
- availability of the service offer
- restrictions on the service offer, eg one per household, per customer
- health and safety at work implications of any offer, eg working hours.

1.3   **Added Value** is the extra, over and above the basic product or service offer that an organisation makes to its customers. This added value represents extra benefits that can truly delight the customers and keep them loyal.

1.4   The **service offer** is defined as the extent and limits of the customer service that an organisation is offering.

Unit 15 Exceed customer expectations (Y/506/2135) (cont'd)

Assessment guidance

2.4　**Offers** to customers could include:
- providing promotional vouchers
- offering additional service within organisational guidelines
- offering additional services that have been advertised
- making verbal offers as appropriate, eg offering something which is approved by the organisation but which the customer thinks has come from the individual.

Unit 16 Deliver customer service whilst working on customers' premises (T/506/2143)

The learner will:

1   Understand how to deliver customer service whilst working on customers' premises

The learner can:

1.1   Describe the preparations that need to be made prior to a visit
1.2   Explain the importance of being positive about the product and/or service
1.3   Explain organisational standards of presentation, behaviour and communication
1.4   Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
1.5   Explain how to identify possible risks relating to the work to be carried out
1.6   Explain the way in which legislation affects the work to be carried out

The learner will:

2   Be able to deliver customer service whilst working on customers' premises

The learner can:

2.1   Identify themselves to customers
2.2   Take action to ensure that customers know when, why and for how long work will be carried out on their premises
2.3   Confirm with customers the nature of work to be carried out on their premises
2.4   Keep customers informed of progress, delays, variations to work to be carried out and follow up needed
2.5   Treat customers, their premises and property with consideration
2.6   Confirm that the customer is satisfied with the outcome
2.7   Maintain their own personal safety and security and that of customers whilst on customers' premises

Unit 16 Deliver customer service whilst working on customers' premises (T/506/2143) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.5   **Risks** are situations or hazards that could cause harm, danger or exposure to danger.

Unit 17 Deliver customer service to challenging customers (F/506/2159)

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

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The learner will:

2   Be able to deal with challenging customers

The learner can:

2.1   Identify the signs that indicate that a customer is challenging
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
2.6   Obtain help from colleagues when options for action are beyond their level of authority
2.7   Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Unit 17 Deliver customer service to challenging customers (F/506/2159) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.2   **Challenging customers** may have:
- Problems/questions
- additional needs/requirements
- poor communication skills and language barriers

or be:
- angry
- unreasonable
- confused.

1.3   **Behaviours** may include but are not limited to:
- aggression
- frustration
- irritation
- confrontation.

1.5   **Techniques** may include but are not limited to:
- active listening
- asking questions
- showing empathy
- using positive body language
- taking action.

1.6   **A service offer** defines the extent and limits of the customer service that an organisation is offering.

Unit 18 Develop customer relationships (Y/506/2149)

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   Be able to develop relationships with customers

The learner can:

2.1   Give help and information that meets or exceeds customers' expectations
2.2   Identify new ways of helping customers based on their feedback
2.3   Share feedback from customers with others
2.4   Identify added value that the organisation could offer customers
2.5   Bring to customers' attention products or services that may interest them

Unit 18 Develop customer relationships (Y/506/2149) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

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   **Alternative service offers** may include:
- product replacement or upgrade
- refund
- compensation
- additional support
- extended warranties.

1.6   **Customer Relationship Management systems** may be software applications or paper-based systems to manage customer data.

2.1   **Customer expectations** are what people think should happen and how they think they should be treated when asking for or receiving customer service.

2.3   **Others** may include colleagues, supervisors or managers.

Unit 19 Support customer service improvements (T/506/2160)

The learner will:

1   Understand how to support customer service improvements

The learner can:

1.1   Describe different sources of information that may help identify ways of improving customer
        service
1.2   Describe the constraints on suggesting improvements to customer service
1.3   Explain the limits of their own authority in implementing improvements

The learner will:

2   Be able to identify the potential for improvements to customer service

The learner can:

2.1   Use information from a range of sources to understand the customer experience
2.2   Identify potential areas where customer service could be improved from an analysis of
        information
2.3   Make recommendations for improvement that are based on evidence from analysed information

The learner will:

3   Be able to support the implementation of improvements to customer service

The learner can:

3.1   Implement agreed improvements within the limits of their own authority
3.2   Inform customers of improvements to customer service
3.3   Identify the impact of improvements to customer service and feedback to relevant people

Unit 19 Support customer service improvements (T/506/2160) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Sources** of information may include but are not limited to:
- customer surveys
- research studies
- analysis of data.

1.2   **Constraint** is a limit or restriction.

3.3   **Relevant people** may include, but are not limited to:
- colleagues
- managers
- shareholders.

Unit 20 Support customers through real-time online customer service (A/506/2161)

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 on-line customer services
1.4   Explain how to adapt their own communication style to meet customers' ability to use online systems

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The learner will:

2   Be able to establish the customer service support needed by customers

The learner can:

2.1   Identify customers' familiarity with the site
2.2   Identify the difficulties faced by customers when navigating websites
2.3   Identify the support for customers that will meet their needs

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The learner will:

3   Be able to support online customer service in real-time

The learner can:

3.1   Step through screen sequences while the customer operates the system
3.2   Communicate with customers in terms they can understand
3.3   Inform customers of what is happening and why certain steps are required
3.4   Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Unit 20 Support customers through real-time online customer service (A/506/2161) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Online customer service systems** could refer to:
- automated online assistants
- instant messages
- technical support operator/technician.

3.2   **In terms they can understand,** in line with organisation's communication guidance, using lay terms rather than jargon.

Unit 21 Use social media to deliver customer service (J/506/2163)

The learner will:

1   Understand social media in a business environment

The learner can:

1.1   Explain how different social media platforms can be used for customer service
1.2   Describe different audience groups for a range of social media platforms
1.3   Explain the importance of monitoring customer posts in social media networks
1.4   Explain organisational policy and guidelines for the use of social media for customer service purposes
1.5   Explain the etiquette of communication within different social media platforms
1.6   Explain the importance of security settings and how they are used on different social media platforms
1.7   Identify the information that can be shared when colleagues are involved in exchanges using social media

The learner will:

2   Be able to deal with customers using social media

The learner can:

2.1   Monitor social media to identify customer questions, requests and comments
2.2   Make responses that are appropriate to posts made by customers on social media networks
2.3   Take action to ensure that customers are satisfied before closing dialogue
2.4   Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

Unit 21 Use social media to deliver customer service (J/506/2163) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Social media platforms** may include but are not limited to Twitter, Facebook and online forums.

Unit 22 Champion customer service (D/506/2153)

The learner will:

1   Understand how to champion customer service

The learner can:

1.1   Evaluate the importance of viewing operations from the customer's viewpoint
1.2   Analyse the role of service partners in providing customer service
1.3   Evaluate the effectiveness of information collection systems and reports
1.4   Describe organisational decision-making processes and limits of their own authority
1.5   Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements
1.6   Describe activities that give added value to the service chain

The learner will:

2   Be able to identify the scope for improvements to customer service

The learner can:

2.1   Monitor customer service delivery to identify issues that are important to customer service
2.2   Analyse the implications of improvements to customer service
2.3   Identify customer service issues relating to new products and/or services
2.4   Identify the strategic and managerial implications of changes to customer service and the service offer

Unit 22 Champion customer service (D/506/2153) (cont'd)

The learner will:

3   Be able to champion customer service

The learner can:

3.1   Promote the role of customer service within an organisation's operational plans
3.2   Inform individual staff members about their role in championing customer service
3.3   Promote the benefits of effective customer service
3.4   Provide validated customer service advice and information to colleagues
3.5   Support others to identify areas for improvement to customer service
3.6   Monitor the effectiveness of advice and information given
3.7   Take actions to ensure that customer service delivery meets agreed standards

Unit 22 Champion customer service (D/506/2153) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   The evaluation should include the impact on **operations** at a strategic business level.

1.2   **Service partners -** A service partnership can be formed when a minimum of two organisations or two departments of the same organisation combine in order to provide more effective customer service. A service partner may be one of those organisations or departments.
As a minimum, the analysis should demonstrate that the learner has clearly identified their **service partners,** the contributions that they make, the interdependencies that exist and the implications of non-cooperation.

1.3   The **evaluation of effectiveness** should be based on **information collected** over a period of time. It should not rely on supposition.

1.5   The suitability of a **range of monitoring techniques** should be assessed in relation to specific key performance indicators which have been identified as a means of measuring customer service.

1.6   **Service chain** - A sequence of services where, for each subsequent service, occurrence of the first action/service is necessary for the occurrence of the second action/service.

2.1   It is expected that feedback will be sought from customers to help define issues that are important to **customer service**.

2.2   As a minimum, the **analysis of implications** should include cost, benefit, feasibility and impact on service partners. Learners are recommended to take a holistic approach and include **improvements** identified as part of assessment criteria1.5, 1.6 and 2.1.

Unit 22 Champion customer service (D/506/2153) (cont'd)

Assessment guidance (cont'd)

2.4   **Service offer** - A service offer defines the extent and limits of the customer service that an organisation is offering.

3.1   The learner should be able to demonstrate their personal input to an organisation's mid to long term **operational plans**.

3.4   The monitoring should relate to the **advice and information given** as part of AC3.4 and should form a natural 'follow-through' as part of performance management activities.

Unit 23 Build and maintain effective customer relations (R/506/2179)

The learner will:

1   Understand how to build effective relationships with customers

The learner can:

1.1   Analyse stakeholder mapping techniques
1.2   Analyse the features of influencing techniques
1.3   Explain how influencing techniques can be used to improve the relationship with customers
1.4   Evaluate the benefits and value of relationships with customers and customer loyalty
1.5   Explain how techniques to manage expectations are applied to the management of customers
1.6   Explain different types of acceptable compromise
1.7   Evaluate the benefits of adopting a 'customer-centred' approach

The learner will:

2   Be able to determine the scope for building effective relationships with customers

The learner can:

2.1   Identify the customers with whom relationships should be developed
2.2   Identify the interests and concerns of customers with whom relationships should be developed
2.3   Evaluate the scope for and limitations of building relationships with different types of customer

Unit 23 Build and maintain effective customer relations (R/506/2179) (cont'd)

The learner will:

3   Be able to develop effective relationships with customers

The learner can:

3.1   Behave in a way that creates mutual trust and respect
3.2   Provide information and perform actions within agreed timescales
3.3   Take account of feedback provided by customers
3.4   Keep customers up to date with new products and/or services and developments
3.5   Assess regularly the extent to which customers' expectations are met
3.6   Use personal influence and authority to ensure that customer needs are met or exceeded

The learner will:

4   Be able to review and improve relationships with customers

The learner can:

4.1   Monitor customer relationships and developments
4.2   Take action to ensure that others complete agreed actions within agreed timescales
4.3   Address changes to customer service methods that may have an effect on customer relationships
4.4   Collect feedback from customers on their levels of satisfaction
4.5   Recommend improvements to customer service based on analyses of the effectiveness of customer relationships

Unit 23 Build and maintain effective customer relations (R/506/2179) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Stakeholder mapping** is identifying the customer base by comparing their influencing power against their interest in the product or service.

1.2   **Influencing techniques** include logical persuading, reciprocative methods and loyalty schemes.

1.6   The types of compromise considered to be **acceptable compromises** may be defined by the organisation.

1.7   **'Customer centred approach'** is pre-empting the customer's needs and expectations.

Unit 24 Manage a customer service award programme (L/506/2181)

The learner will:

1   Understand the management of a customer service award programme

The learner can:

1.1   Justify the reasons for an award programme
1.2   Explain how to make use of a customer service award programme as a promotional tool
1.3   Explain the likely impact of organisational culture on a customer service award programme
1.4   Explain the requirements of a business case for a customer service award programme

The learner will:

2   Be able to plan a customer service award programme

The learner can:

2.1   Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme
2.2   Evaluate the benefits, drawbacks and costs of different options for a customer service award programme
2.3   Select the option that best meets the objectives of the award programme
2.4   Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales
2.5   Develop award criteria that are transparent and fair

Unit 24 Manage a customer service award programme (L/506/2181) (cont'd)

The learner will:

3   Be able to manage a customer service award programme

The learner can:

3.1   Promote the award programme with the dual purpose of motivating team members and engaging
         customers
3.2   Take action to ensure that award winners are recognised in a way that demonstrates
         organisational commitment to excellent customer service
3.3   Evaluate the effectiveness of a customer service award programme

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify
and define elements of the Assessment criteria as required. Assessment guidance provided is for
example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Award programme**, a scheme which may be internal or external that enables organisations to
         recognise and reward great service. This can be for individuals or for organisations.

1.4   **Business case**, a business case captures the reasoning for initiating a project or task.

Unit 25 Manage the use of technology to improve customer service (Y/506/2183)

The learner will:

1   Understand how to manage the use of technology to improve customer service

The learner can:

1.1	Analyse developments in information and communication technology that relate to customer service
1.2	Analyse the features, functions and implications of technology for customer service delivery
1.3	Explain how to monitor the use of technology to improve customer service

The learner will:

2   Be able to identify opportunities for customer service improvement through the use of technology

The learner can:

2.1	Review the effectiveness of customer service delivery against agreed criteria
2.2	Identify how customer service delivery could be improved by the introduction or adaptation of technology
2.3	Assess the costs of changes in the use of technology to improve customer service delivery
2.4	Make recommendations for changes in the use of technology through a costed business case

Unit 25 Manage the use of technology to improve customer service (Y/506/2183) (cont'd)

The learner will:

3   Be able to implement changes in technology to improve customer service

The learner can:

3.1   Plan the implementation of changes in the use of technology in a way that minimises disruption to business
3.2   Update colleagues on the implementation and expected benefits of new technology
3.3   Provide staff with training in the use of new technology
3.4   Monitor the implementation of changes in the use of technology in line with the plan
3.5   Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria

There is no assessment guidance available for this unit.

Unit 26 Develop a social media strategy for customer service (D/506/2962)

The learner will:

1   Understand the development of a customer service social media strategy

The learner can:

1.1   Explain the role of social media within the organisation's customer service strategy
1.2   Analyse the components and scope of a social media strategy and its links with other aspects of the organisation
1.3   Explain the importance of marketing and brand values for the organisation's strategy
1.4   Explain the functionality and features of external social media tools
1.5   Analyse media management tools in relation to social networking
1.6   Evaluate the way in which the organisation's use of social media contributes to business performance

The learner will:

2   Be able to develop a customer service social media strategy

The learner can:

2.1   Evaluate the factors affecting the development of a customer service social media strategy
2.2   Assess the suitability of different methods of engaging customers using social media
2.3   Analyse competitor presence and activity in social media
2.4   Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints
2.5   Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks
2.6   Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy

Unit 26 Develop a social media strategy for customer service (D/506/2962) (cont'd)

The learner will:

3   Be able to promote the benefits of social media networking to customer service

The learner can:

3.1   Evaluate the benefits and drawbacks of using social media for dissemination purposes
3.2   Analyse the benefits and consequences of social media engagement with customers
3.3   Promote on-going dialogue with customers through social networking
3.4   Act as a social media 'champion' within the organisation
3.5   Analyse the risks attached to the use of social media

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.3   **Brand Values** are customers' perceptions of an organisation and/or its products.

1.4   **External Social media tools** may include, but are not limited to:
- LinkedIn
- Twitter
- Facebook
- Instagram
- YouTube
- Vimeo
- Pinterest
- Google+
- Flickr.

3.4   **Social media 'champion'** an advocate for the use of social media for the delivery of customer service to colleagues, team members.

Unit 27 Support customers using self-service equipment (H/506/2977)

The learner will:

1   Understand how to support customers using self-service equipment

The learner can:

1.1   Explain how the self-service equipment works
1.2   Describe problems that are commonly encountered by customers when using self-service equipment
1.3   Explain demonstration techniques to use when supporting customers using self-service equipment
1.4   Explain organisational procedures for the use of equipment and fault reporting

The learner will:

2   Be able to identify the help needed by customers using self-service equipment

The learner can:

2.1   Identify signs that show when a customer is having difficulty with the self-service equipment
2.2   Identify a style and level of intervention that meets customers' needs

The learner will:

3   Be able to help customers to use self-service equipment

The learner can:

3.1   Maintain a professional, polite and approachable manner while monitoring customers' use of equipment
3.2   Use staff override functions to enable self-service equipment to be used by customers
3.3   Explain to customers how to use the equipment and complete the transaction
3.4   Report equipment-related errors and issues to the right person

Unit 27 Support customers using self-service equipment (H/506/2977) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Self-service equipment** is a machine that enables a customer to pay for purchases without direct input from the organisation's staff.

Unit 28 Provide post-transaction customer service (K/506/2978)

The learner will:

1   Understand post-transaction customer service

The learner can:

1.1   Explain organisational policies and procedures for post-transaction customer service
1.2   Explain the purposes and range of post-transaction activities
1.3   Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
1.4   Explain how legislation and regulation affect customers' rights
1.5   Explain the advantages and disadvantages of post-transaction customer service programmes

The learner will:

2   Be able to provide post-transaction customer service

The learner can:

2.1   Implement a programme of planned post-transaction interventions in line with organisational guidelines
2.2   Use unplanned opportunities post-transaction to provide customer service
2.3   Identify reasons for contacting customers post-transaction
2.4   Confirm customers' levels of satisfaction post-transaction
2.5   Make recommendations to decision makers to enhance customer satisfaction
2.6   Present a professional and helpful image

Unit 28 Provide post-transaction customer service (K/506/2978) (cont'd)

Assessment guidance

Assessment guidance is provided below for some Assessment criteria. The purpose of this is to clarify and define elements of the Assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1   **Policies and procedures** explained should be in relation to the **organisation** where the learner carries out post-transactional customer service (LO2).

1.3   Where possible the explanation should be in relation to **sales contracts, guarantees and warranties** provided by the **organisation**.

1.4   Specific, relevant examples of **legislation and regulation** should be referred to and explained.

2.1   A **programme** should consist of a series of **interventions** carried out over time.

2.2   The learner should demonstrate that they are able to recognise **unplanned opportunities** and take appropriate action to provide customer service over and above what would normally be expected.

2.5   The learner should demonstrate that they actively consider ways of **enhancing customer satisfaction** and **make recommendations** which are feasible within their real work environment. Learners should make more than one recommendation over time.

Unit 29 Negotiate in a business environment (H/506/1912)

The learner will:

1   Understand the principles underpinning negotiation

The learner can:

1.1   Describe the requirements of a negotiation strategy
1.2   Explain the use of different negotiation techniques
1.3   Explain how research on the other party can be used in negotiations
1.4   Explain how cultural differences might affect negotiations

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The learner will:

2   Be able to prepare for business negotiations

The learner can:

2.1   Identify the purpose, scope and objectives of the negotiation
2.2   Explain the scope of their own authority for negotiating
2.3   Prepare a negotiating strategy
2.4   Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
2.5   Assess the likely objectives and negotiation stances of the other party
2.6   Research the strengths and weaknesses of the other party

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The learner will:

3   Be able to carry out business negotiations

The learner can:

3.1   Carry out negotiations within responsibility limits in a way that optimises opportunities
3.2   Adapt the conduct of the negotiation in accordance with changing circumstances
3.3   Maintain accurate records of negotiations, outcomes and agreements made
3.4   Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

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There is no assessment guidance available for this unit.

Unit 30 Promote equality, diversity and inclusion in the workplace (T/506/1820)

The learner will:

1   Understand the organisational aspects of equality, diversity and inclusion in the workplace

The learner can:

1.1   Explain the difference between equality, diversity and inclusion
1.2   Explain the impact of equality, diversity and inclusion across aspects of organisational policy
1.3   Explain the potential consequences of breaches of equality legislation
1.4   Describe nominated responsibilities within an organisation for equality, diversity and inclusion

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The learner will:

2   Understand the personal aspects of equality, diversity and inclusion in the workplace

The learner can:

2.1   Explain the different forms of discrimination and harassment
2.2   Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
2.3   Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace

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Unit 30 Promote equality, diversity and inclusion in the workplace (T/506/1820) (cont'd)

The learner will:

3   Be able to support equality, diversity and inclusion in the workplace

The learner can:

3.1   Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace
3.2   Identify potential issues relating to equality, diversity and inclusion in the workplace
3.3   Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

There is no assessment guidance available for this unit.

Unit 31 Manage team performance (A/506/1821)

The learner will:

1   Understand the management of team performance

The learner can:

1.1   Explain the use of benchmarks in managing performance
1.2   Explain a range of quality management techniques to manage team performance
1.3   Describe constraints on the ability to amend priorities and plans

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The learner will:

2   Be able to allocate and assure the quality of work

The learner can:

2.1   Identify the strengths, competences and expertise of team members
2.2   Allocate work on the basis of the strengths, competences and expertise of team members
2.3   Identify areas for improvement in team members' performance outputs and standards
2.4   Amend priorities and plans to take account of changing circumstances
2.5   Recommend changes to systems and processes to improve the quality of work

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Unit 31 Manage team performance (A/506/1821) (cont'd)

The learner will:

3   Be able to manage communications within a team

The learner can:

3.1   Explain to team members the lines of communication and authority levels
3.2   Communicate individual and team objectives, responsibilities and priorities
3.3   Use communication methods that are appropriate to the topics, audience and timescales
3.4   Provide support to team members when they need it
3.5   Agree with team members a process for providing feedback on work progress and any issues arising
3.6   Review the effectiveness of team communications and make improvements

There is no assessment guidance available for this unit.

Unit 32 Manage individuals' performance (J/506/1921)

The learner will:

1   Understand the management of underperformance in the workplace

The learner can:

1.1   Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance
1.2   Explain how to identify causes of underperformance
1.3   Explain the purpose of making individuals aware of their underperformance clearly but sensitively
1.4   Explain how to address issues that hamper individuals' performance
1.5   Explain how to agree a course of action to address underperformance

The learner will:

2   Be able to manage individuals' performance in the workplace

The learner can:

2.1   Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
2.2   Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
2.3   Apply motivation techniques to maintain morale
2.4   Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards
2.5   Monitor individuals' progress towards objectives in accordance with agreed plans
2.6   Recognise individuals' achievement of targets and quality standards
2.7   Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace

There is no assessment guidance available for this unit.

Unit 33 Collaborate with other departments (M/506/1931)

The learner will:

1   Understand how to collaborate with other departments

The learner can:

1.1   Explain the need for collaborating with other departments
1.2   Explain the nature of the interaction between their own team and other departments
1.3   Explain the features of effective collaboration
1.4   Explain the potential implications of ineffective collaboration with other departments
1.5   Explain the factors relating to knowledge management that should be considered when
         collaborating with other departments

The learner will:

2   Be able to identify opportunities for collaboration with other departments

The learner can:

2.1   Analyse the advantages and disadvantages of collaborating with other departments
2.2   Identify with which departments collaborative relationships should be built
2.3   Identify the scope for and limitations of possible collaboration

The learner will:

3   Be able to collaborate with other departments

The learner can:

3.1   Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements
3.2   Work with other departments in a way that contributes to the achievement of organisational
         objectives

There is no assessment guidance available for this unit.

Unit 34 Negotiating, handling objections and closing sales (F/502/8612)

The learner will:

1   Understand how to handle objections and negotiate with the customer

The learner can:

1.1   Describe the scope of authority and responsibility when dealing with objections
1.2   Identify the resources available to counter the sales objections
1.3   Describe how to plan and prepare for negotiation
1.4   Describe how to use testimonials to progress a sale
1.5   Explain the advantages and disadvantages of different methods of closing a sale
1.6   Explain organisational procedures for documenting the negotiated sale

The learner will:

2   Be able to prepare for objections and negotiation with the customer

The learner can:

2.1   Identify possible sales objections and appropriate responses prior to dealing with the customer
2.2   Confirm authorisation to negotiate
2.3   Prepare a negotiation plan that is capable of providing a mutually acceptable outcome

Unit 34 Negotiating, handling objections and closing sales (F/502/8612) (cont'd)

The learner will:

3   Be able to handle objections

The learner can:

3.1   Identify customer needs and wants in relation to objections by using a variety of questioning
         techniques
3.2   Identify and prioritise customers' concerns
3.3   Provide evidence to the customer of the strengths of the organisation's products or services
3.4   Confirm with the customer that the objection(s) have been overcome
3.5   Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the
         nature of the signals

The learner will:

4   Be able to negotiate with the customer

The learner can:

4.1   Carry out negotiations according to negotiation plan
4.2   Promote the benefits of what is being offered to the customer
4.3   Explain to the customer when and why no further adjustment is possible
4.4   Obtain support to progress negotiation that is outside own level of authority

The learner will:

5   Be able to close the sale following negotiation

The learner can:

5.1   Apply a trial close in accordance with the negotiation plan
5.2   Respond to any further objections and concerns
5.3   Identify and make use of potential add-on, up-selling or cross-selling opportunities
5.4   Summarise agreements made in accordance with organisational procedures and close the sale

Unit 34 Negotiating, handling objections and closing sales (F/502/8612)

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 35 Obtaining and analysing sales-related information (R/502/8615)

The learner will:

1   Understand the uses of sales-related information

The learner can:

1.1   Explain the importance of up-to-date information for sales planning purposes
1.2   Explain the benefits and risks of using a range of information sources to support sales activities
1.3   Explain the limitations of sales-related information
1.4   Explain the importance of reviewing sales data requirements for current and future use

The learner will:

2   Understand how to use tools and methods to analyse sales-related information

The learner can:

2.1   Explain the advantages and disadvantages of different systems to gather sales-related information
2.2   Explain how to use different software packages for analysing and presenting sales-related information

The learner will:

3   Be able to obtain sales-related information about customers, markets and competitors

The learner can:

3.1   Specify the information needed to develop an understanding of customers, competitors and markets
3.2   Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors
3.3   Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation

Unit 35 Obtaining and analysing sales-related information (R/502/8615) (cont'd)

The learner will:

4   Be able to use tools and methods to analyse sales-related information

The learner can:

4.1   Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information
4.2   Define the information needs of the target audience for different types of sales-related information
4.3   Use the analytical protocols that are appropriate to the selected tools and methods
4.4   Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information
4.5   Validate the reliability and validity of the findings of the analysis
4.6   Provide sales-related information to the target audience within the agreed timescale and budget

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 36 Buyer behaviour in sales situations (K/502/8622)

The learner will:

1   Understand the impact of different models of buyer behaviour on the sales cycle

The learner can:

1.1   Explain the consumer buying decision-making process
1.2   Explain how the consumer buying decision-making process affects the sales cycle
1.3   Describe the influences that affect the consumer decision-making process
1.4   Explain the organisational buying decision-making process
1.5   Explain how the organisational buying decision-making process affects the sales cycle
1.6   Describe the influences that affect the organisational buying decision-making process
1.7   Explain the impact of the different roles within the decision-making unit on the sales cycle

The learner will:

2   Be able to respond to the buyer at each stage of the decision making process

The learner can:

2.1   Use the methods for contacting customers, influencers and decision-makers appropriate to
         different stages of the buying decision-making process
2.2   Respond to different decision-makers in a sales situation in a way that is appropriate to their role
2.3   Use objections as buying opportunities
2.4   Confirm solution(s) offered meet the needs and wants of decision-makers

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 37 Manage incidents referred to a contact centre (K/503/0418)

The learner will:

1   Be able to manage incidents through a contact centre

The learner can:

1.1   Respond to incoming contacts relating to incidents in accordance with organisational procedures
1.2   Select resources that are available to deal with reported incidents
1.3   Inform the selected personnel of their responsibilities in accordance with organisational procedures
1.4   Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures
1.5   Monitor the management of the incident in accordance with organisational procedures
1.6   Ensure that the correct decision paths have been followed to manage reported incidents
1.7   Deal with queries and/or complaints about incident handling in accordance with organisational procedures

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The learner will:

2   Be able to provide support to colleagues on incident management in a contact centre

The learner can:

2.1   Agree with colleagues the areas in which they need support and guidance in incident management
2.2   Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs
2.3   Identify actions to improve team performance in incident handling from a review of incident management results

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Unit 37 Manage incidents referred to a contact centre (K/503/0418) (cont'd)

The learner will:

3   Understand how to manage incidents reported to a contact centre

The learner can:

3.1   Explain the incident management services offered by the contact centre
3.2   Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident
3.3   Explain the importance of clear communication using the most appropriate channel with those dealing with incidents
3.4   Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident
3.5   Describe the strengths and weaknesses of different types of support for colleagues
3.6   Explain the importance of reviewing incident management results

Assessment guidance

This unit must be assessed in line with Skills CFA Contact Centre Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 38 Lead direct sales activities in a contact centre team (D/503/0397)

The learner will:

1   Be able to carry out sales activities in a contact centre

The learner can:

1.1   Prepare for a direct sales activity in accordance with organisational procedures
1.2   Establish customer wishes and needs
1.3   Offer options to customers by linking their wishes and needs to products and/or services
1.4   Adapt their sales style and techniques to mirror customer wishes and behaviour
1.5   Close the sale by agreement with the customer during the customer contact
1.6   Record the confirmed order in accordance with organisational procedures
1.7   Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre
1.8   Complete the authorisation or payment in accordance with organisational procedures

The learner will:

2   Be able to analyse contact centre sales data

The learner can:

2.1   Collate sales data from direct sales activities in a format that enables data manipulation
2.2   Analyse sales performance against market and customer trends
2.3   Summarise the results of the sales analysis to enable the formulation of a sales plan

Unit 38 Lead direct sales activities in a contact centre team (D/503/0397) (cont'd)

The learner will:

3   Be able to lead a team involved in direct sales activities in a contact centre

The learner can:

3.1   Identify sales activities which are capable of fulfilling the sales plan
3.2   Agree realistic and achievable team sales targets including cross-selling and up-selling
3.3   Monitor the team's sales performance against agreed targets
3.4   Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach
3.5   Provide encouragement and guidance to team colleagues during sales activities

The learner will:

4   Understand sales activities in a contact centre team

The learner can:

4.1   Explain the features and benefits of the products and/or services offered or supported by the contact centre
4.2   Explain the organisational and regulatory requirements of direct sales activities
4.3   Explain the techniques for overcoming objections and questions from customers during sales activities
4.4   Explain the importance of adapting their style and approach to mirror customers' style and perspective
4.5   Explain the importance of setting a good example in a contact centre team
4.6   Explain how to set sales targets including cross-selling and up-selling

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 39 Manage diary systems (L/506/1807)

The learner will:

1   Understand the management of diary systems

The learner can:

1.1   Explain the importance of keeping diary systems up to date
1.2   Describe the basis on which bookings and changes are prioritised
1.3   Explain any constraints relating to making bookings for people or facilities
1.4   Describe the types of problems that can occur when managing diaries

The learner will:

2   Be able to manage diary systems

The learner can:

2.1   Obtain the information needed to make diary entries
2.2   Make accurate and timely diary entries
2.3   Respond to changes in a way that balances and meets the needs of those involved
2.4   Communicate up-to-date information to everyone involved
2.5   Keep diaries up-to-date
2.6   Maintain the requirements of confidentiality

There is no assessment guidance available for this unit.

Unit 40 Contribute to the organisation of an event (L/506/1869)

The learner will:

1   Understand event organisation

The learner can:

1.1   Explain the roles, responsibilities and accountabilities of individuals involved in the event
1.2   Explain the purpose and features of different types of events
1.3   Describe the type of resources needed for different types of events
1.4   Describe the different needs attendees may have and how to meet these
1.5   Explain the requirements of health, safety and security when organising events
1.6   Describe the types of problems that may occur during events and how to deal with them

The learner will:

2   Be able to carry out pre-event actions

The learner can:

2.1   Identify venue requirements for an event
2.2   Obtain resources within the agreed timescales
2.3   Distribute pre-event documentation to delegates in accordance with the event plan
2.4   Co-ordinate attendee responses within the agreed timescale
2.5   Identify any special requirements of event attendees

The learner will:

3   Be able to set up an event

The learner can:

3.1   Set up layout and resources in accordance with the event plan
3.2   Confirm that all identified resources are in place and meet requirements
3.3   Behave in a way that maintains organisational values and standards

Unit 40 Contribute to the organisation of an event (L/506/1869) (cont'd)

The learner will:

4   Be able to carry out post-event actions

The learner can:

4.1   Ensure the venue is restored to the required conditions in accordance with the terms of the
         contract
4.2   Carry out follow-up actions in accordance with the event plan and agreements made at the event

There is no assessment guidance available for this unit.

Unit 41 Provide reception services (H/506/1814)

The learner will:

1   Understand reception services

The learner can:

1.1   Explain the receptionist's role in representing an organisation
1.2   Explain an organisation's structure and lines of communication
1.3   Describe an organisation's standards of presentation
1.4   Explain the health, safety and security implications of visitors to a building
1.5   Explain how to deal with challenging people

The learner will:

2   Be able to provide a reception service

The learner can:

2.1   Welcome visitors in accordance with organisational standards
2.2   Direct visitors to the person they are visiting in accordance with organisational standards
2.3   Record visitors' arrivals and departures in accordance with organisational procedures
2.4   Provide advice and accurate information within organisational guidelines on confidentiality
2.5   Keep the reception area tidy and materials up-to-date
2.6   Answer and deal with telephone calls within organisational standards
2.7   Adhere to organisational procedures on entry, security, health and safety

There is no assessment guidance available for this unit.

Unit 42 Buddy a colleague to develop their skills (M/506/1895)

The learner will:

1   Understand how to buddy a colleague

The learner can:

1.1   Describe what is expected of a buddy
1.2   Explain techniques to give positive feedback and constructive criticism
1.3   Explain techniques to establish rapport with a buddy

The learner will:

2   Be able to plan to buddy a colleague

The learner can:

2.1   Agree which aspects of a colleague's work may benefit from buddying
2.2   Confirm organisational requirements for standards of behaviour, presentation, communication
         and performance of a buddy colleague
2.3   Agree a schedule of meetings that minimise disruption to business
2.4   Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

The learner will:

3   Be able to support a buddy colleague carrying out work activities

The learner can:

3.1   Remain unobtrusive while a buddy colleague carries out their work activities
3.2   Provide examples of how to carry out tasks correctly
3.3   Identify instances of good practice and areas for improvement through observation
3.4   Praise a buddy colleague on well completed tasks
3.5   Give constructive feedback on ways in which a buddy could improve performance
3.6   Offer a buddy hints and tips based on personal experience

Unit 42 Buddy a colleague to develop their skills (M/506/1895) (cont'd)

There is no assessment guidance available for this unit.

Unit 43 Employee rights and responsibilities (L/506/1905)

The learner will:

1   Understand the role of organisations and industries

The learner can:

1.1   Explain the role of their own occupation within an organisation and industry
1.2   Describe career pathways within their organisation and industry
1.3   Identify sources of information and advice on an industry, occupation, training and career
        pathway
1.4   Describe an organisation's principles of conduct and codes of practice
1.5   Explain issues of public concern that affect an organisation and industry
1.6   Describe the types, roles and responsibilities of representative bodies and their relevance to their
        own role

The learner will:

2   Understand employers' expectations and employees' rights and obligations

The learner can:

2.1   Describe the employer and employee statutory rights and responsibilities that affect their own role
2.2   Describe an employer's expectations for employees' standards of personal presentation,
        punctuality and behaviour
2.3   Describe the procedures and documentation that protect relationships with employees
2.4   Identify sources of information and advice on employment rights and responsibilities

No assessment guidance available for this unit.

Unit 44 Processing sales orders (M/502/8587)

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   Be able to process sales orders

The learner can:

2.1   Identify customer sales order requirements
2.2   Check that the credit status of the customer meets organisational standards
2.3   Confirm the availability of products and/or services to the customer
2.4   Ensure that information given to the customer about delivery, timing and price is accurate
2.5   Ensure that the sale is authorised following the organisation's procedures
2.6   Finalise the transaction in accordance with organisational procedures
2.7   Ensure that the customer is aware of the terms and conditions of sale
2.8   Ensure that the customer's requirements are communicated to those responsible for fulfilling
         sales orders
2.9   Identify who to go to when in need of support with sales order processing problems

Unit 44 Processing sales orders (M/502/8587) (cont'd)

The learner will:

3   Be able to follow up sales order processing

The learner can:

3.1   Keep the customer informed of the sales order progress and any problems with the sale order
3.2   Advise the customer of current discounts and special offers
3.3   Check all information is stored securely

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

Unit 45 Bespoke software (J/502/4397)

The learner will:

1   Input and combine information using bespoke software

The learner can:

1.1   Input relevant information accurately so that it is ready for processing
1.2   Select and use appropriate techniques to link and combine information within the application and across different software applications

The learner will:

2   Create and modify appropriate structures to organise and retrieve information efficiently

The learner can:

2.1   Evaluate the use of software functions to structure, layout and style information
2.2   Create, change and use appropriate structures and/or layouts to organise information efficiently
2.3   Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

The learner will:

3   Exploit the functions of the software effectively to process and present information

The learner can:

3.1   Select and use appropriate tools and techniques to edit, analyse and format information
3.2   Check information meets needs, using IT tools and making corrections as necessary
3.3   Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
3.4   Select and use presentation methods to aid clarity and meaning

Unit 45 Bespoke Software (J/502/4397) (cont'd)

Assessment guidance

This unit must be assessed in line with e-Skills uk IT User Assessment Strategy.

Please visit the qualification page on the NCFE website.

Section 4

Explanation of terms

Section 4
Explanation of terms

This table explains how the terms used at Level 3 in the unit content are applied to this qualification (not all verbs a in this qualification).

Apply	Explain how existing knowledge can be linked to new or different situations in practice.
Analyse	Break the subject down into separate parts and examine each part. Show how the main ideas are related and why they are important. Reference to current research or theory may support the analysis.
Clarify	Explain the information in a clear, concise way.
Classify	Organise according to specific criteria.
Collate	Collect and present information arranged in sequence or logical order.
Compare	Examine the subjects in detail and consider the similarities and differences.
Critically compare	This is a development of compare where the learner considers the positive aspects and limitations of the subject.
Consider	Think carefully and write about a problem, action or decision.
Demonstrate	Show an understanding by describing, explaining or illustrating using examples.
Describe	Write about the subject giving detailed information in a logical way.
Develop (a plan/idea which…)	Expand a plan or idea by adding more detail and/or depth of information.
Diagnose	Identify the cause based on valid evidence.
Differentiate	Identify the differences between two or more things.
Discuss	Write a detailed account giving a range of views or opinions.
Distinguish	Explain the difference between two or more items, resources, pieces of information.
Draw conclusions (which…)	Make a final decision or judgment based on reasons.
Estimate	Form an approximate opinion or judgment using previous knowledge or considering other information.

Evaluate	Examine strengths and weaknesses, arguments for and against and/or similarities and differences. Judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Reference to current research or theory may support the evaluation.
Explain	Provide detailed information about the subject with reasons showing how or why. Responses could include examples to support these reasons.
Extrapolate	Use existing knowledge to predict possible outcomes which might be outside the norm.
Identify	Recognise and name the main points accurately. (Some description may also be necessary to gain higher marks when using compensatory marking).
Implement	Explain how to put an idea or plan into action.
Interpret	Explain the meaning of something.
Judge	Form an opinion or make a decision.
Justify	Give a satisfactory explanation for actions or decisions.
Plan	Think about and organise information in a logical way using an appropriate format.
Perform	Carry out a task or process to meet the requirements of the question.
Provide	Identify and give relevant and detailed information in relation to the subject.
Review and revise	Look back over the subject and make corrections or changes.
Reflect	Learners should consider their actions, experiences or learning and the implications of this for their practice and/or professional development.
Select	Make an informed choice for a specific purpose.
Show	Supply evidence to demonstrate accurate knowledge and understanding.
State	Give the main points clearly in sentences or paragraphs.
Summarise	Give the main ideas or facts in a concise way.

Section 5

General information

Section 5
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.

Candidates 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 go to the NCFE website.

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