

Level 3 Certificate in Customer Service

Scheme handbook

City & 
Guilds

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City & Guilds

City & Guilds was established over 125 years ago with the purpose of encouraging education and training in, and for, the workplace. Today, we are the leading provider of vocational qualifications in the UK. With over 500 qualifications in areas as diverse as Agriculture, Hairdressing and IT, we offer a supreme range, which is valued by employers in all sectors.

Our qualifications are available at a number of levels, from entry to the highest levels of professional ability. The table below gives guidance as to the levels of awards, and the subsequent summary of the content gives an insight into the level of knowledge and/or ability required.

Guide to levels

- 7 Fellowship (FCGI)
- 6 Membership (MCGI)
- 5 Graduateship (GCGI)/Associateship (ACGI), S/NVQ 5, ILM Executive Diploma in Management, ILM Member (MInstLM)
- 4 ILM Diploma in Management, ILM Associate Member (AMInstLM), Licentiateship (LCGF), S/NVQ 4, Career Extension, Master, Full Technological Certificate
- 3 ILM First Line Management, ILM Associate Member (AMInstLM), S/NVQ 3, Advanced GNVQ, Vocational (non NVQ), Technological Baccalaureate, General Education, Pitman Qualifications Advanced, Owner Manager Qualifications
- 2 ILM Team Leading, ILM Affiliate Member (AInstLM), S/NVQ 2, Intermediate GNVQ, Vocational (non NVQ), General Education, Pitman Qualifications Intermediate
- 1 S/NVQ 1, Foundation GNVQ, Vocational (non NVQ), Diploma of Vocational Education (Foundation), GCSE, General Education, Pitman Qualifications Basic

Summary

Level 1

These are introductory awards for those new to the area and cover routine tasks or basic knowledge and understanding.

Level 2

These qualifications are for those with some knowledge of, and ability in, the area and acknowledge individual responsibility.

Level 3

These qualifications recognise complex work involving supervisory ability.

Level 4

These qualifications demand specialist or technical expertise.

Level 5

These qualifications require the application of complex principles and techniques involving responsibility for human and material resources.

Level 6

These qualifications are for those at senior management level.

Level 7

These qualifications recognise the highest levels of professional achievement.

Whatever level you choose, City & Guilds awards are nationally recognised and give you the opportunity to prove to employers that you have the skills and ability that they are looking for.

Introduction

The award

This award is aimed at candidates who are in a working and/or learning environment. They will have the opportunity to learn, develop and practice the skills required to make an effective contribution to a customer service environment.

This award is designed to contribute towards the knowledge and understanding for the Level 3 N/SVQs in Customer Service while containing additional skills and knowledge which go beyond the scope of the National Occupational Standards, It provides a valuable alternative for those candidates who do not have access to the N/SVQ.

The Level 3 Certificate in Customer Service is recognised as the Technical Certificate for the Foundation Modern Apprenticeship (FMA) in Customer Service.

City and Guilds offers a range of Vocationally Related Qualifications, please contact Customer Relations Unit at City & Guilds for further information.

Apprenticeships and technical certificates

Apprenticeships are designed to enable the apprentice to learn on the job, building up knowledge and skills, gaining qualifications and earning money all at the same time.

There are different levels of Apprenticeship available, but they all lead to National Vocational Qualifications (NVQs), Key Skills qualifications and, in most cases, a technical certificate.

The technical certificate is delivered through off-the-job learning and provide apprentices with the underpinning knowledge of the chosen business area which is so important if employees are to progress in their jobs.

For the Advanced Apprenticeship in Customer Service the Level 3 Certificate in Customer Service is recognised as the technical certificate.

A wide variety of skills are needed for the Customer Service Apprenticeship, including identifying customers and what they value, patience, commitment to work, not being judgemental and an excellent telephone manner.

For more information on Apprenticeships visit www.realworkrealpay.info.

General information

This Award has been designed by City & Guilds to support government initiatives towards the National Qualifications Framework. It can contribute towards the knowledge and understanding required for the related N/SVQ while not requiring or proving evidence of occupational competence.

Structure

The Level 3 Certificate is made up of units expressed in standard format.

Each unit is preceded by details of

- the structure of the unit
- the aims and general coverage of the unit
- the relationship of the unit to the appropriate N/SVQ/National Occupational Standards
- the outcomes
- the assessment methods
- signposting of opportunities to generate evidence for Key Skills.

For the Level 3 Certificate in Customer Service, the units are:

- 101 Customer service principles and techniques
- 102 Manage, develop and support the customer service environment
- 103 Co-ordinate products and services for customers.

Assessment and quality assurance

National standards and rigorous quality assurance are maintained by the use of

- City & Guilds set and marked written test(s)
- City & Guilds Assignments, marked by the centre according to externally set marking criteria, with quality assurance provided by the centre and monitored by City & Guilds' external verification system, to ensure that national standards are maintained.

Quality assurance includes initial centre approval, the centre's own procedures for monitoring quality and City and Guilds' ongoing monitoring by an External Verifier. Details of City & Guilds criteria and procedure, including roles of centre staff and External Verifiers can be found in *Providing City & Guilds Qualifications – a guide to centre and scheme approval*.

Centre and scheme approval

Centres wishing to offer City & Guilds qualifications must gain approval.

New centres must apply for centre and scheme approval.

Existing City & Guilds centres will need to get specific scheme approval to run this award.

Full details of the process for both centre and scheme approval are given in *Providing City & Guilds Qualifications – a guide to centre and scheme approval*, which is available from City & Guilds' regional offices.

City & Guilds reserves the right to suspend an approved centre, or withdraw its approval from an approved centre, to conduct a particular City & Guilds scheme or particular City & Guilds schemes, for reasons of debt, malpractice or for any reason that may be detrimental to the maintenance of authentic, reliable and valid qualifications or that may prejudice the name of City & Guilds.

Written test/external test

The written test assesses knowledge and understanding. It is an externally set and marked multiple choice test and is set synoptically, ie covers the content of more than one unit. The written test is graded pass/fail.

Assignments

Assignments (one per unit) assess practical activities, and also underpinning knowledge. City & Guilds provides an assessor's guide and a candidate's guide for the assignments. As assignments are designed to *sample* the practical activities and underpinning knowledge, it is essential that centres ensure that candidates cover the content of the whole unit.

The assessor's guide and the candidate guide are packaged together and are available from Publications Sales (stock reference EN-13-4410).

Assignments are graded (Pass or Fail). A pass is the achievement level required for the knowledge and understanding in an NVQ and generally represents the ability to follow instructions and procedures.

For candidates with particular requirements, centres should refer to City & Guilds policy document *Access to assessment, candidates with particular requirements*.

Health and safety

The requirement to follow safe working practices is an integral part of all City & Guilds' qualifications and assessments, and it is the responsibility of centres to ensure that all relevant health and safety requirements are in place before candidates start practical assessments. Should a candidate fail to follow health and safety practice and procedures during an assessment (eg practical assessment, assignment), the test must be stopped and the candidate advised of the reasons why. The candidate should be informed that they have failed the assessment. Candidates may retake the assessment at a later date.

Course design

Teacher/assessors should familiarise themselves with the structure and content of the award before designing an appropriate course; in particular they are advised to consider the knowledge and understanding requirements of the relevant N/SVQ(s).

City & Guilds does not itself provide courses of instruction or specify entry requirements. As long as the requirements for the award are met, teachers/assessors may design courses of study in any way that they feel best meets the needs and capabilities of the candidates. Units are broadly the same size and centres may deliver them in any order they wish. Centres may wish to introduce other topics as part of the programme which will not be assessed through the qualifications, eg to meet local needs.

It is recommended that centres cover the following in the delivery of the course, where appropriate

- Health and safety considerations, in particular the need to impress to candidates that they must preserve the health and safety of others as well as themselves
- Key Skills (such as Communication, Application of Number, Information Technology, Working with others, Improving own learning and performance, Problem solving)
- Environmental education, related European issues
- Spiritual, moral, ethical, social and cultural issues

It is recommended that 40 hours should be allocated for each unit required for certification. This may be on a full time or part time basis.

No specific prior qualifications, learning or experience are required for candidates undertaking the qualification. However, the nature of both the learning and assessment required for the qualification is such that candidates will need basic literacy and numeracy skills: ie the ability to read and interpret written tasks and to write answers in a legible and understandable form. Candidates will also need to be able to organise written information clearly and coherently with accurate spelling and grammar.

Centres will need to make an initial assessment of each candidate and decide on the most appropriate level of qualification.

Registration and certification

For the award of a certificate, candidates must successfully complete the synoptic multiple choice test which covers the 3 units and the assignments for each of the units.

| Units | Assessment components required |
|---|--|
| Unit 101 Customer service principles | 4410-13-101 Assignment |
| Unit 102 Manage, develop and support the customer service environment | 4410-13-102 Assignment |
| Unit 103 Co-ordinate products and services for customers | 4410-13-103 Assignment |
| Units 101-103 Effective Customer Service Level 3 | 4410-13-104 Written test short answer |

- Candidates must be registered at the beginning of their course. Centres should submit registrations via the Walled Garden or on Form S (Registration), under scheme/complex no. 4410-13.
- When assignments have been successfully completed, candidate results should be submitted via the Walled Garden or on Form S (Results submission). Centres should note that results, ie certificates/certificates of unit credit, will **not** be processed by City & Guilds until verification records are complete.
- The short answer test will be offered in paper format as fixed date examinations.
- Candidates achieving one or more assessment components will receive a Certificate of Unit Credit listing the assessment components achieved. Candidates achieving the number and combination of assessment components required for the Certificate will, in addition, be issued a full Certificate.
- Full details on all the above procedures, together with dates and times of written tests will be found in the *Directory of Vocational Awards* published annually by City & Guilds. This information also appears on City & Guilds Web site <http://www.city-and-guilds.co.uk>
- Where there are inconsistencies between this scheme handbook and the *Directory of Vocational Awards*, the latter always prevails.

Test specifications

The knowledge requirements will be assessed by a synoptic short answer paper to cover all of the units. The table below shows the mark distribution across the units and outcomes.

Subject: Level 3 Certificate in Customer Service

Paper No.: 4410-13-104

Paper title: Effective customer service

Duration: 1 hour 30 minutes

No of questions: 20

| Units | Number of items | % |
|--|------------------------|----------|
| Unit 101 | | |
| The outcomes for this unit are to: | | |
| 1 Identify and negotiate the appropriate solutions to solve customer problems which meet organisational constraints. | 4 | |
| 2 Use effective interpersonal and communication skills with a range of customers. | 3 | |
| 3 Use a range of techniques to achieve customer satisfaction. | 1 | |
| Totals | 8 | 40 |
| Unit 102 | | |
| The outcomes for this unit are to: | | |
| 1 Support and monitor the team to maintain performance, achieve targets and promote good practice. | 3 | |
| 2 Develop and maintain effective customer service records. | 3 | |
| 3 Support, review and evaluate the customer service environment. | 2 | |
| Totals | 8 | 40 |
| Unit 103 | | |
| The outcomes for this unit are to: | | |
| 1 Describe and influence the market sector. | 2 | |
| 2 Market and promote products and services. | 2 | |
| Totals | 4 | 20 |

Relationship to units

This award contributes towards the knowledge and understanding of certain elements of the N/SVQ in Customer Service (4507/8). The table below shows which elements correspond with which outcomes of this award.

| Units | Elements |
|---|---------------|
| Unit 101 The outcomes for this unit are to: 1 Identify and negotiate the appropriate solutions to solve customer problems which meet organisational constraints 2 Use effective interpersonal and communication skills with a range of customers 3 Use a range of techniques to achieve customer satisfaction. | 301, 302 |
| Unit 102 The outcomes for this unit are to: 1 Support and monitor the team to maintain performance, achieve targets and promote good practice 2 Develop and maintain effective customer service records 3 Support, review and evaluate the customer service environment. | 303, 304, 305 |
| Unit 103 The outcomes for this unit are to: 1 Describe and influence the market sector 2 Market and promote products and services. | 307 |

Connections with ICS course outline template

| Units | ICS Customer Service Technical Certificate |
|---|--|
| Unit 101 The outcomes for this unit are to: | |
| 1 Identify and negotiate the appropriate solutions to solve customer problems which meet organisational constraints | 1 .1, 1.2, 1.3, 1.6, 2.1, 2.4, 2.5, 2.6, 2.7, 3.1, 3.2, 3.3, 3.4 |
| 2 Use effective interpersonal and communication skills with a range of customers | 1.1, 1.2, 1.3, 1.4, 1.6, 2.5, 2.7, 3.1 3.2, 3.3 |
| 3 Use a range of techniques to achieve customer satisfaction. | 1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 2.4 |
| Unit 102 The outcomes for this unit are to: | |
| 1 Support and monitor the team to maintain performance, achieve targets and promote good practice | 2.1 2.5, 2.7, 3.1, 3.3, 3.4 |
| 2 Develop and maintain effective customer service records | 1.2, 1.4, 2.1, 2.6, 2.7, 3.1, 3.2 |
| 3 Support, review and evaluate the customer service environment. | 1 .2, 1.5, 1.6, 2.4, 2.5, 2.6, 3.1 |
| Unit 103 The outcomes for this unit are to: | |
| 1 Describe and influence the market sector | 2.1, 2.2, 2.3 |
| 2 Market and promote products and services. | 2.1, 2.3, 3.2, 3.4, 3.5 |

Key Skills Signposting

The units cover the key skills as shown in the table below.

| Unit No and Title | Communi- cation | Application of Number | Information Technology | Working with others | Improving own learning and performance | Problem Solving |
|--|----------------------------|----------------------------------|-----------------------------------|--------------------------------|---|----------------------------|
| 101 – Customer service principles and techniques | C1 | – | – | WO2 | – | PS2 |
| 102 – Manage, develop and support the customer service environment | – | – | – | WO2 | – | PS2 |
| 103 – Co-ordinate products and services for customers | – | – | IT2 | – | – | – |

Health and safety, spiritual etc, environmental and European issues

The units provide opportunities to address the following issues as indicated:

| Units | Spiritual, Moral, Ethical, Social and Cultural | Environmental | Health and Safety | European Development |
|-------|--|---------------|-------------------|----------------------|
| 101 | X | – | X | – |
| 102 | X | – | X | – |
| 103 | – | – | X | – |

Business ethics

Business ethics are the moral principles that should underpin decision-making. A business decision made on ethical grounds might reject the most profitable solution in favour of one of greater benefit to the organisation.

Business ethics are based upon a moral code of action and, as an organisation is made up of individuals who have their own moral codes, these create the overall business culture of an organisation.

If an organisation wished to draw up an ethical code of business practice, the following sections might be included:

- personal integrity, eg when dealing with suppliers and managing resources
- organisational integrity eg forbidding undercutting or predatory pricing policies
- environmental responsibility eg minimising waste and maximising recycling
- social responsibility eg providing products and services of genuine value, which are promoted with honesty and dignity.

Operating an ethical policy gives an organisation a unique selling point (USP), if none of its competitors has one. Being first with an ethical policy may result in increased sales or services. However, this must be weighed against possible increased costs and initial loss of business.

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Unit 101

Customer service principles and techniques

Unit summary

This unit is about enabling the candidate to develop and apply an appropriate knowledge and understanding of the principles and techniques of customer service in order to create and implement effective solutions.

Unit aims

This unit aims to ensure the candidate is able to:

- deal with different types of customer and be able to identify problems, select an appropriate solution, negotiate a solution with the customer and then implement the solution. Candidates will need to describe any organisational constraints which are appropriate to the situation.
- use interpersonal skills to meet a range of customer expectations and to identify which is the most appropriate method of communication (eg verbal, non-verbal)
- carry out a SWOT analysis on their own performance when the candidate feels they have performed well with a particular customer. Candidates will need to use a range of techniques to improve customer service (eg analysing customer feedback, setting and reviewing targets)

What the candidate must know for the whole unit:

On completion of this unit and in order to undertake the practical activities, candidates will require a sound knowledge and understanding of **customer service principles and techniques**. They should be able to:

- describe different types of customer and ways of meeting their needs eg (satisfied, dissatisfied, angry, frustrated, difficult, special needs requirements)
- identify factors which form customer expectations (eg quality, price, performance, reputation, past/present experiences)
- identify and list all relevant legislation which affects customer service (eg consumer law, equal opportunities/disability legislation)
- explain solution finding techniques which balance the needs of both customer and organisation (eg influencing and negotiating)
- explain the purpose of a code of practice and their relationship to customer service
- identify different forms of contracts and explain what makes a contract binding (eg verbal, memorandum of understanding, service level agreements)
- list interpersonal skills (eg listening, eye contact, questioning, assertiveness, posture, personal presentation)
- describe examples of when it is important to adapt inter-personal skills to maintain effective customer relationships (long and short term customers) (eg dealing with aggressive behaviour, confused behaviour, special needs, cultural/regional/social needs)
- describe the barriers to effective communication (eg noise, language, environment, technology breakdowns)
- describe how own and customers' behaviour affects expectations (eg prejudice, beliefs, values, ethical standards)

Unit 101

Customer service principles and techniques

- identify the strengths and weaknesses of different methods of communication (eg face-to-face, e-mail, letter, fax...)
- identify specialist forms of communication (eg sign language, Braille) and ways to access them
- describe the benefits of a range of techniques used to monitor customer service delivery (eg customer feedback, questionnaires, surveys, call-monitoring).

(The examples listed against each point are for illustrative purposes and are not exhaustive).

Delivery strategies

The content for this unit can be delivered in various ways; the following delivery strategies can be considered:

- **In the workplace** where the candidate can experience customer service in action with course content being taught at an appropriate in-house or external facility
- **In a college or other training establishment** where the candidate is being taught course content and where there is an opportunity to experience a realistic customer service environment eg reception, college library, restaurant/canteen areas, administration office, or placement in a local company.

Likely outcomes

The following points outline some of the likely outcomes from this unit; the list is not intended to be exhaustive. However, candidates should aim to demonstrate they could identify:

- different customer types
- how customer expectations are formed
- the interpersonal skills required to deliver effective customer service
- the principles of communication when talking face-to-face or on the telephone, when using the written word in letters/faxes or when communicating via electronic media
- the barriers to effective communication
- the most appropriate method of communication to select to the meets the needs of different customers
- techniques for dealing with customers with special needs
- how behaviour breeds behaviour
- how to adjust their behaviour to respond to the needs & feelings of customers
- techniques for calming angry customers
- techniques for meeting the needs of different customer types
- ways of meeting customer needs whilst also balancing the needs of the organisation including the skills of influencing and negotiating
- problem solving techniques, including how to identify problems, how to select an appropriate solution, negotiating with the customer and implementing the solution
- the legislation and regulations which impact upon customer service delivery eg the specific aspects of health and safety, data protection, equal opportunities, disability discrimination, consumer law, contract law

Unit 101

Customer service principles and techniques

- how codes of practice impact upon customer service
- different types of contract and their impact upon customer service
- the benefits of monitoring customer service delivery
- how to generate ideas for improving customer service
- how to plan, set targets for improvement and monitor customer service improvements
- how to review own performance using a SWOT analysis.

The assessment tools for this unit are:

External assessment

- a synoptic test of short answer questions (graded pass/fail) to assess knowledge and understanding
- completion of an assignment to assess practical activities and under-pinning knowledge.

Internal assessment of the candidate's ability, knowledge and understanding could also be covered by:

- observation of performance
- witness statements
- 1:1 discussions
- work based projects eg case studies, simulation and role play
- evaluative and reflective reports including the completion of a learning log
- products and outcomes of work.

For this unit the likely resources required will be:

- sources of learning opportunities
- library/internet access
- notes/handouts on a variety of topics (especially on legislation and regulations)
- samples of best practice letters (including style, grammar)
- samples of codes of conduct
- samples of customer feedback questionnaires.

Unit 101

Customer service principles and techniques

Rationale

The aim of this unit is to enable the candidate to develop and apply the necessary knowledge and understanding of the principles and techniques of customer service within their environment to create and implement effective solutions.

Outcomes

There are 3 outcomes to this unit. The candidate will be able to:

- 1 identify and negotiate solutions to solve customer problems which meet organisational constraints
- 2 use effective communication skills with a range of customers
- 3 use a range of techniques to achieve customer satisfaction.

Connection with other awards

This unit contributes towards the knowledge and understanding required for the following awards:

N/SVQ in Customer Service

301,302

ICS Customer Service Technical Certificate

1.1, 1.2, 1.3, 1.4, 1.5, 1.6

2.1,2.4,2.5,2.6,2.7

3.2, 3.2, 3.3, 3.4

Guided learning hours

it is recommended that 40 hours should be allocated for each of the units. This may be on a full time or part time basis.

Assessment

Assessment will be by means of an assignment covering practical activities and a synoptic multiple choice test covering the underpinning knowledge of all three units.

Unit 101

Customer service principles and techniques

Outcome 1

Identify and negotiate solutions which meet organisational constraints to solve customer problems

On completion of this outcome the candidate will be able to identify different types of customer and ways of meeting their needs and expectations including the use of interpersonal skills. They will also understand how this must be done in line with any organisational constraints and the impact of legislation on service delivery. Finally, the candidate will be able to use range of techniques achieve customer satisfaction through continuous service improvement.

| Practical activities | Likely resources | Notes for guidance |
|---|--|---|
| Deal with different types of customers and meet their needs | Access to appropriate workplace environment Role play exercises | <ul style="list-style-type: none">• The candidate must show they can deal with different customer types (eg angry, confused, special needs requirements)• The candidate should show they are able to identify problems, select an appropriate solution, negotiate a solution with the customer and implement the solution. |
| Describe the organisations constraints which are appropriate to the situation | Notes on legislation Notes on managing resources | <ul style="list-style-type: none">• The candidate must show they consider the impact of their behaviour and actions is directly related to the organisation's available resources eg time, money, technology, people, premises, equipment, budgets• The candidate should show they understand legislation may also impact upon service delivery. |

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|---|--|
| Describe different types of customers and describe ways to meet their needs | Notes on different customer behaviours Notes on problem-solving techniques Notes on negotiation skills Notes on influencing skills | <ul style="list-style-type: none">• The candidate must be able to recognise behaviours in a range of customer types ie this includes customers who are satisfied, dissatisfied, angry, frustrated, difficult & customers with special needs requirements.• The candidate must be able to describe ways of meeting their needs through the use of problem solving techniques. They should have an understanding of the problem solving cycle and the skills required at each stage ie understand the problem, identify the cause, discuss possible solutions, solve the problem. |

Unit 101

Customer service principles and techniques

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|--|---|
| | Videos of customer/customer service assistant interactions | <ul style="list-style-type: none"> When discussing the solution with the customer, the candidate should be able to describe how negotiation skills and influencing skills can be used |
| | | <ul style="list-style-type: none"> The candidate should understand it may be necessary to seek the agreement of others when selecting the appropriate solution The candidate should be able to describe what factors need to be considered when implementing the agreed solution. |
| Identify the factors which form customer expectations | | <ul style="list-style-type: none"> The candidate should recognise how customer expectations are formed. Factors could include: past experience, present experience, other people's experiences, quality, price, performance, brand reputation, changing trends, advertising. |
| Identify and list all the relevant legislation which affects customer service | Notes on legislation and regulations | <ul style="list-style-type: none"> The candidate should understand people working in organisations have a range of contractual duties and statutory duties which affect the way products or services can be delivered and which affect how customers are treated. The key legislation the candidate should be aware of is: <ul style="list-style-type: none"> – Sale of Goods Act 1979 – Supply of Goods & Services Act 1982 – Trade Descriptions Act 1968 – Consumer Credit Act 1974 – Consumer Protection Act 1987 – Consumer Protection (Distance Selling) Regulations 2000 – Data Protection Act 1998 – Disability Discrimination Act 1995 – Sex Discrimination Act 1975 – Race Relations Act 1976 (as amended) – Health & Safety at Work Act 1974 The candidate should also understand organisations may enter into contractual agreements with customers and the implications of these contracts. |

Unit 101

Customer service principles and techniques

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|---|--|
| Explain the techniques used to arrive at a solution which meets the needs of both customer and organisation such as influencing and negotiating | Notes on negotiation skills Notes on influencing skills Video examples of negotiation in action | <ul style="list-style-type: none">• The candidate should understand customer service is not just about saying 'yes' to customers. They should understand it is necessary to balance the needs of both customer and organisation. This may involve them in influencing the customer and negotiating with the customer in order to reach agreement• The candidate should be able to describe how to explain to a customer their needs and expectations cannot be met. |
| Explain the purpose of a code of practice and describe their relationship to customer service | Sample codes of practice | <ul style="list-style-type: none">• The candidate should understand codes of practice aim to maintain standards in various sectors eg banking, insurance• The candidate should understand sector codes of practice normally contain details advising customers how to complain and/or how to instigate grievance procedures. |
| Identify different forms of contracts and describe what makes a contract binding | Notes on contract law | <ul style="list-style-type: none">• The candidate should understand the fundamental principles of the law of contract• The candidate should be able to identify how these principles impact upon the various types of contract eg verbal, service level agreements, memorandum of understanding. |

Unit 101

Customer service principles and techniques

Outcome 2

Use effective interpersonal and communication skills with a range of customers

This outcome is about enabling the candidate to use interpersonal skills to meet a range of customer expectations. To do this the candidate will need to be able to identify which is the most appropriate method of communication to use in a range of situations.

| Practical activities | Likely resources | Notes for guidance |
|---|--|--|
| Use interpersonal skills to meet a range of customer expectations | Access to the workplace or a realistic customer service environment. | <ul style="list-style-type: none">• The candidate must show they can effectively use a range of inter-personal and communication skills in a variety of situations eg when dealing with angry or confused behaviour, people who are anxious or upset, people with special needs• The candidate should be able to demonstrate techniques for calming angry customers and diffusing difficult situations• The candidate should demonstrate the importance of a good first impression and how to build rapport• The candidate should be able to identify how their effective use of communication skills has achieved customer satisfaction ie they need to check customers' expectations are met• At all times candidate should be aware of the need to always communicate in a clear, polite and confident way. |
| Identify when to use the appropriate methods of communication | <p>Samples of good/bad letters/ e-mails/faxes</p> <p>Copies of organisational guidelines for letter writing/ use of email.</p> | <ul style="list-style-type: none">• The candidate should be aware of the principles associated with the use of each method of communication and how an organisation may have its own guidelines for their use• The candidate should be aware that time, money, the need to keep a permanent record and legislation may govern the choice of communication. |

Unit 101

Customer service principles and techniques

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|--|---|--|
| List interpersonal skills | Notes on body language Notes on assertiveness Notes on effective listening Notes on questioning techniques Listening skills exercise brief. | <ul style="list-style-type: none">• The candidate should be aware of the variety of interpersonal skills which can be used to achieve customer satisfaction. These include listening skills, body language, assertiveness, appropriate use of language, eye contact, questioning techniques, personal presentation• The candidate understands how effective inter-personal and communication skills should be used to communicate with customers in a clear, polite and confident way. |
| Describe examples of when it is important to adapt interpersonal skills to maintain effective customer relationships (long and short term customers) | Notes on recognising customers' needs and expectations Notes on building rapport Role play exercises. | <ul style="list-style-type: none">• The candidate should understand customer perceptions are affected by a service deliverer's behaviour, attitude and actions• Similarly, the candidate should recognise different behaviours in a range of customers will require a service deliverer to adapt their own behaviour eg when dealing with aggressive behaviour or confused behaviour; people who are upset, frustrated or worried; people with special needs or cultural needs• The candidate should be able to recognise that body language affects the behaviour of both customers and service deliverers and how adapting body language can be used to achieve customer satisfaction• The candidate should be aware how each customer transaction impacts upon longer term customer service relationships. |
| Describe the barriers to effective communication | | <ul style="list-style-type: none">• The candidate should be aware of the obstacles faced by both customers and service deliverers which may impact upon customer satisfaction eg poor listening skills, language problems, technology breakdowns, environmental constraints. |

Unit 101

Customer service principles and techniques

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|--|--|
| Describe how own and customers' behaviour affects expectations | Notes on the concept of behaviour breeds behaviour Role play briefs Opportunity to observe customer service in action. | <ul style="list-style-type: none">• The candidate should understand there are regional and social norms which govern behaviour• The candidate needs to be aware of how their own and their customers' behaviour affects customer expectations eg values, beliefs, prejudice, stereotyping, ethical standards• The candidate should understand how misunderstanding behaviour and making assumptions potentially leads to customer dissatisfaction. |
| Identify the strengths and weaknesses of different methods of communication | Notes on the principles of communicating face-to-face, by telephone, letter e-mail or fax. | <ul style="list-style-type: none">• The candidate should be able to list the different methods of communication (eg face-to-face, letter, telephone, fax, e-mail• For each method, candidates should know which method to select in a range of situations. To do this, candidates should be able to identify strengths and weaknesses of each• The candidate should also be aware organisations may have their own guidelines governing which method of communication to use and how it should be used (eg when to use emails or letters, what situations must always be dealt with face-to-face, when/how to use customer names). |
| Identify specialist forms of communication | Notes on useful contacts/website addresses Notes on impact of DDA . | <ul style="list-style-type: none">• The candidate should be aware specialist forms of communication may be needed and what they are eg Braille, sign language• The candidate should know where to go for help and sources of information eg RNIB. |

Unit 101

Customer service principles and techniques

Outcome 3

Use a range of techniques to achieve customer satisfaction

On completion of this outcome the candidate will be able to understand their own strengths and development needs when working to achieve customer satisfaction. By using a range of techniques, the candidate will also be able to understand their own role in improving customer service.

| Practical activities | Likely resources | Notes for guidance |
|---|--|---|
| Carry out a SWOT analysis on achieving an instance of customer satisfaction | Sample role profile for a customer service deliverer showing knowledge and skills required Access to the workplace or a realistic customer service environment Feedback opportunities Notes on receiving feedback Notes on SWOT technique. | <ul style="list-style-type: none">• The candidate should be aware of their own strengths and development needs at the start of their course• Formal personal development planning and action planning should follow.• The candidate needs to understand how and when a moment of customer satisfaction is achieved• When this happens, candidates should undertake a SWOT analysis on their own performance and review this SWOT against the original indication of their strengths and development needs• The candidate should understand how the outcome can be used to promote a cycle of continuous personal development and improving customer service |
| Use a range of techniques to improve customer service | Sample sources of feedback or own observation notes Notes on setting targets Notes on analysing and monitoring techniques | <ul style="list-style-type: none">• The candidate should be able to analyse customer feedback obtained from different sources eg observation, questionnaires• Using the analysis results, candidates should work towards setting targets for service improvements and make plans to monitor the results• The candidate should be aware of the impact of any changes on customers, colleagues, their organisation and their own development when making any plans for change• The candidate should show they are able to monitor and review the impact of any changes made as a result of using customer feedback. |

Unit 101

Customer service principles and techniques

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|--|---|--|
| Describe the benefits of a range of techniques used to monitor customer service delivery | Samples of customer feedback questionnaires/ surveys Notes on setting targets and monitoring techniques. | <ul style="list-style-type: none">• The candidate should be aware continuous improvement is a balancing act between achieving customer satisfaction, the cost of providing service and any regulatory requirements. All customer service deliverers have a role to play in ensuring customer satisfaction is achieved, sustained and improved upon• The candidate can do this by understanding the benefits of using customer feedback• The candidate should be able to identify the range of techniques available eg informal methods – observing customer behaviour/talking to customers and formal methods – customer comment cards, surveys, customer satisfaction questionnaires, letters of complaint/praise, telephone surveys, call logs, focus groups• The candidate should know the advantages and disadvantages of each method and how each method can be used to gather information to improve customer service. This should include how organisations use feedback to plan, set targets for improvement and monitor customer service improvements. |

Unit 102

Manage, develop and support the customer service environment

Unit summary

This unit is about enabling the candidate to work with colleagues in a customer service environment. This includes the management, development and support of people (ie the team) and activities associated with customer service delivery.

Unit aims

This unit aims to ensure the candidate is able to:

- understand how to help team members learn, develop and plan to improve customer service skills and knowledge.
- gather information from customers using a range of communication methods. They will need to show they can design a system for keeping customer service records and that they can evaluate the effectiveness of these systems to meet changing needs.
- identify and solve complex, non-routine problems and complaints. They should understand the need to evaluate customer service delivery in order to promote continuous improvement. This means candidates will need to use the results of their evaluation of customer problems and complaints to identify areas for action and improvement.

What the candidate must know for the whole unit:

On completion of this unit and in order to undertake the practical activities, candidates will require a sound knowledge and understanding of what is involved with supporting, reviewing and evaluating the customer service environment. The candidate will be able to:

- identify the levels of performance required (eg key performance indicators (KPI), service level agreements (SLA))
- identify methods of assessment and explain reasons for using them eg psychometric testing, training needs analysis (TNA), team working exercises, observation
- list advantages and disadvantages of different methods of assessment eg cost implications, interpersonal problems, time barriers, access to resources
- identify methods of benchmarking eg achievement against targets, SLA, industry codes of practice, NVQs, national standards, KPIs
- identify requirements of TNA eg current performance, training development required to meet organisational and national standards
- describe approaches to training and learning and benefits to the individual and organisation eg coaching, mentoring, work-shadowing, e-learning, learning styles
- identify methods of evaluating effective development solutions eg cost benefit analysis, personal benefits, corporate benefits, benefits to the customer

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Manage, develop and support the customer service environment

- describe the benefits and drawbacks of the range of communication methods available when managing and developing customer service records
- identify relevant legislation and its implications for record keeping eg data protection, copyright
- describe the importance of maintaining security and confidentiality of data
- give examples of how the use of record keeping systems help manage and support the customer service process
- list the range of actions and techniques available to deal with the differing demands of customers eg offering refunds or replacements; apologising in writing, by phone, face-to-face, compensation; using calming techniques, decision making, negotiation skills, listening skills and assertiveness
- describe the benefits of evaluating the customer service process
- list factors that limit your authority to solve customer problems eg financial, organisational policies, legal reasons, resources.

(The examples listed against each point are for illustrative purposes and are not exhaustive).

Delivery strategies

The content for this unit can be delivered in various ways; the following delivery strategies can be considered:

- **In the workplace** where the candidate can experience customer service in action with course content being taught at an appropriate in-house or external facility
- **In a college or other training establishment** where the candidate is being taught course content and where there is an opportunity to experience a realistic customer service environment eg reception, college library, restaurant/canteen areas, administration office, or placement in a local company.

Likely outcomes

The following points outline some of the likely outcomes from this unit; the list is not intended to be exhaustive. However, candidates should aim to demonstrate they could identify:

- the aims and objectives of their organisation/business unit and the role of the team in helping to contribute towards these
- how to use organisational systems and procedures to develop individual and team performance
- how team dynamics impact upon team performance
- how to identify and review the personal development needs of team members
- how to assess the performance of individual team members
- how to give constructive personal feedback to team members
- how to help team members respond positively to personal feedback
- assessment methodologies available to monitor individual and team performance and the advantages and disadvantages of each
- learning and development opportunities available to support individual and team development (eg coaching, 1:1 discussions, mentoring, work-shadowing)

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Manage, develop and support the customer service environment

- methods of benchmarking team performance (eg achievement against targets, SLA, industry codes of practice, organisational standards, national standards, NVQs, KPIs)
- methods of evaluating development solutions and the impact on customers, the organisation, and the individual
- options for keeping records of customer feedback and other customer service information such as purchase trends
- how to collect customer feedback using a range of communication methods (eg face-to-face, telephone interviews, questionnaires)
- how to evaluate systems to meet changing needs
- relevant legislation impacting upon storing and recording customer service information eg data protection, copyright
- how to use organisational systems and procedures to solve customer problems
- how to work with customers and colleagues to solve customer problems
- methods and techniques for dealing with the different demands of customers eg offering refunds or replacements; apologising in writing, by phone, face-to-face, compensation; using calming techniques, decision making, negotiation skills, listening skills and assertiveness
- why it is important to evaluate the customer service process
- factors which limit their authority to solve customer problems.

The assessment tools for this unit are:

External assessment

- a synoptic test of short answer questions (graded pass/fail) to assess knowledge and understanding
- completion of an assignment to assess practical activities and under-pinning knowledge.

Internal assessment of the candidate's ability, knowledge and understanding could also be covered by:

- observation of performance
- witness statements
- 1:1 discussions
- work based projects eg case studies, simulation and role play
- evaluative and reflective reports including the completion of a learning log
- products and outcomes of work.

For this unit the likely resources required will be:

- sources of learning opportunities
- library/internet access
- notes/handouts on a variety of topics.

Unit 102

Manage, develop and support the customer service environment

Rationale

The aim of this unit is to prepare the candidate with the necessary skills and knowledge to manage, develop and support the personnel and activities within the customer service environment.

Outcomes

There are 3 outcomes to this unit. The candidate will be able to

- 1 support and monitor the team to maintain performance, achieve targets and promote good practice
- 2 manage and develop effective customer service records
- 3 support, review and evaluate the customer service environment.

Connection with other awards

This unit contributes towards the knowledge and understanding required for the following awards:

N/SVQ in Customer Service

303, 304, 305 ICS

Customer Service Technical Certificate

1.2, 1.4, 1.5, 1.6

2.1, 2.4, 2.5, 2.6, 2.7

3.1, 3.2, 3.3, 3.4

Guided learning hours

It is recommended that 40 hours should be allocated for each of the units. This may be on a full time or part time basis.

Assessment

Assessment will be by means of an assignment covering practical activities and a synoptic multiple choice test covering underpinning knowledge of all three units.

Unit 102

Manage, develop and support the customer service environment

Outcome 1

On completion of this outcome the candidate will be able to understand how to help team members learn, develop and plan to improve customer service skills and knowledge.

| Practical activities | Likely resources | Notes for guidance |
|--|--|---|
| Monitor team performance, identify learning needs and produce development plan | Role play briefs Opportunities to work as a team member/support a team Opportunities to give feedback to a team member(s). | <ul style="list-style-type: none">The candidate should experience the full cycle of linking customer satisfaction to the cycle of setting targets, reviewing performance, analysing gaps, supporting development needs and evaluating the development solution. |

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|--|---|
| Identify the levels of performance required eg key performance indicators (KPI), service level agreements (SLA) | Sample role profile Sample SLAs Sample KPIs Notes on team dynamics. | <ul style="list-style-type: none">The candidate should understand how the team contributes to an organisation/business units aims and objectivesThe candidate should be able to recognise how individual team members need knowledge and skills as defined by an appropriate role profile to support the achievement of these aims and objectivesAs well as understanding the contribution of individuals, the candidate should understand how team dynamics impact upon performance and the ultimate achievement of customer satisfaction. |
| Identify methods of assessment and explain reasons for using them List the advantages and disadvantages of different methods of assessment | Notes on assessment methods | <ul style="list-style-type: none">The candidate should be able to identify methods of assessing individual performance eg observation, psychometric testing, training needs analysis (TNA), feedback, questioningFor each method of assessment, the candidate should be able to draw up a list of when and how to use them incorporating the disadvantages and advantages of each eg cost implications, interpersonal problems, time, access to resources. |

Unit 102

Manage, develop and support the customer service environment

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|--|---|
| Identify methods of benchmarking eg achievement against targets,SLA, industry codes of practice, NVQs, national standards, KPIs | Internet/library access Sample codes of practice Access to National Occupational Standards in customer service Access to N/SVQs in customer service | <ul style="list-style-type: none">The candidate should carry out research to ascertain what methods can be used to monitor the performance of individuals and teams through benchmarking. |
| Identify requirements of TNA | Notes on the principles of TNA Notes on personal development & action planning (PDAP) Notes on setting personal development objectives Sample PDAP | <ul style="list-style-type: none">The candidate should know how carrying out a TNA can help to support the effective delivery of customer serviceThe candidate should understand to undertake an effective TNA, an indication of current performance against organisational and national standards will inform the training and development required to meet any knowledge/skills gapsThe candidate should understand how formalising personal development through effective use of a PDAP will contribute towards TNA. |
| Describe approaches to training and learning and benefits to the individual and organisation | Notes on learning styles and methods Access to sources of information on training and development opportunities | <ul style="list-style-type: none">The candidate should be able to identify a range of training and development opportunities (learning methods) eg coaching, mentoring, work-shadowing, feedback opportunities, in-house training, formal performance appraisals, e-learningThe candidate should show an appreciation of individual learning styles which may impact upon which is the most appropriate learning methodFor each learning method, the candidate should be able to list the benefits to both the individual and the organisation. |
| Identify methods of evaluating effective development solutions | Notes on evaluation techniques | <ul style="list-style-type: none">The candidate should be able to list the methods of analysing the impact of implementing a development solution. They should consider the benefits to the customer, the organisation, other team members as well as the impact on the performance of the individual in question. |

Unit 102

Manage, develop and support the customer service environment

Outcome 2

Manage and develop effective customer service records

On completion of this outcome, the candidate will be able to gather information from customers using a range of communication methods. They will need to show they can design a system for keeping customer service records and that they can evaluate the effectiveness of these systems to meet changing needs.

| Practical activities | Likely resources | Notes for guidance |
|--|--|--|
| Design a record keeping system for customer complaints, feedback on products, purchase trends, mailing list, progress tracking | Access to pc/manual record keeping systems Sample management information in feedback collected Sample complaint logs | <ul style="list-style-type: none">• The candidate should understand why customer feedback/information is sought and how it will be used and should be able to design a record keeping system with these objectives in mind• Consideration should be given to what information can be stored under the Data Protection Act 1998. |
| Collect customer feedback using a range of communication methods | Access to an appropriate customer service learning environment | <ul style="list-style-type: none">• Using the chosen system for record keeping system, the candidate should undertake activities which enable them to log customer feedback• A variety of communication methods should be chosen to collect this feedback having given due consideration to which is likely to be effective |
| Evaluate systems to meet changing needs | | <ul style="list-style-type: none">• The candidate should undertake activities which enable them to see if their record-keeping systems have achieved the objectives for which they were designed |

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|--|--|
| Describe the benefits and drawbacks of the range of communication methods available | Notes on methods for collecting feedback | <ul style="list-style-type: none">• The candidate should be able to explain what communication methods can be used to obtain customer feedback eg asking questions verbally, face-to-face or on the telephone, formal interviews 1:1 or in a group, written questionnaires, focus groups, street surveys, telephone surveys, direct mailings, mystery shoppers, suggestion boxes, service calls, spontaneous customer feedback• For each method, candidates need to understand the benefits and drawbacks to the organisation and to the customer |

Unit 102

Manage, develop and support the customer service environment

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|---|---|
| Identify relevant legislation and its implications for record keeping | Notes on Data Protection Act 1998 Notes on copyright law | <ul style="list-style-type: none">• The candidate should understand their obligations under the Data Protection Act 1998 and copyright law in relation to the recording, storing and supplying of information• The candidate should also identify other legislation which may also impact upon the recording of information in specific customer service sectors. |
| Describe the importance of maintaining security and confidentiality of data | Notes on Data Protection Act 1998 Sample organisational guidelines | <ul style="list-style-type: none">• The candidate should be able to explain why their obligations under the Data Protection Act 1998 are directly related to the need to maintain the security and confidentiality of data• The candidate should be able to describe the potential impact on themselves, the customer and their organisation of not doing so• The candidate should also be aware organisations may have their own guidelines for maintaining the security and confidentiality of data. |
| Give examples of how the use of record keeping systems help manage and support the customer service process | Notes on analysing customer feedback | <ul style="list-style-type: none">• The candidate should be able to explain why gathering feedback from customers has an impact and benefit on customer service.• The candidate should be able to give specific examples of how feedback collected, recorded and analysed has contributed towards continuous customer service improvement• The candidate should be able to explain how analysis of records can help to identify trends in customer service delivery. These trends might link to a need for process improvement or they might suggest individuals' performance needs addressing. |

Unit 102

Manage, develop and support the customer service environment

Outcome 3

Support, review and evaluate the customer service environment

On completion of this outcome the candidate will be able to identify and solve complex, non-routine problems and complaints. They should understand the need to evaluate customer service delivery in order to promote continuous improvement. The candidate will be able to use the results of their evaluation of customer problems and complaints to identify areas for action and improvement.

| Practical activities | Likely resources | Notes for guidance |
|--|---|--|
| Identify and solve complex, non-routine problems and complaints to meet a range of customer expectations | Sample complaint logs Role play briefs | <ul style="list-style-type: none">• The candidate should demonstrate an awareness of the variety of customer problems which occur eg problems caused by a difference between customer expectations and the product/service received, problems resulting from system/procedure failures, problems resulting from inadequate resources, problems caused by human error• The candidate should demonstrate an understanding of the problem solving cycle eg understanding the problem, identifying the cause, discussing the solution, solving the problem• The candidate should demonstrate techniques for dealing with customers who have complained and who have a variety of expectations as a result of the complaint eg using calming techniques, diffusing negative emotions. |
| Evaluate the customer service process and make appropriate recommendations | | <ul style="list-style-type: none">• The candidate should be able to show they can analyse problems and their causes and the under-pinning customer service processes with a view to identifying areas for change. The analysis should take into account the impact of the problem on customers and the organisation.• The candidate should discuss with others what changes if any should be taken and make recommendations• The candidate should consider how best to present their ideas for change/recommendations to others. |

Unit 102

Manage, develop and support the customer service environment

| Practical activities | Likely resources | Notes for guidance |
|---|------------------------------------|---|
| Use evaluation of customer problems and complaints to identify areas for action and improvement | Samples of customer complaint logs | <ul style="list-style-type: none">• The candidate should specifically use analyses of customer problems and complaints to identify areas for action and improvement. Any areas for improvement/action should take into account the benefits of change to customers, the organisation and employees• The candidate should be aware of the cost implications of making any changes |

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|--|---|---|
| List the range of actions and techniques available to deal with the differing demands of customers | Sample complaints procedures Notes on legislation concerning making a refund | <ul style="list-style-type: none">• The candidate should understand customers express dissatisfaction in different ways and each requires a different response• The candidate should be aware that organisations may have specified procedures for dealing with complaints and solving problems• The candidate should be able to list techniques available for dealing with customer problems and complaints eg refunds, replacements, compensation• The candidate should be able to list how they could adjust their own behaviour when dealing with customer dissatisfaction eg using calming techniques, assertiveness skills, negotiation, effective listening• The candidate should understand what constitutes an effective apology in writing, on the telephone or face-to-face• The candidate should view complaints in a positive manner as they provide early warning signals and an opportunity to improve the customer relationship. |
| Describe the benefits of evaluating the customer service process | Notes on the principles of continuous improvement | <ul style="list-style-type: none">• The candidate should be able to explain why evaluating the customer service process promotes continuous improvement• The candidate should be able to explain that any evaluation should take into account the impact and benefit of any change on customers, the organisation and its employees. |
| List factors that limit your authority to solve customer problems | Sample organisational guidelines | <ul style="list-style-type: none">• The candidate should be aware of the limits of their own authority when solving customer problems• The candidate should be able to identify the factors which limit their authority to act eg financial, organisational policies, legal, resources. |

Unit 103

Co-ordinate products and services for customers

Unit summary

This unit is about enabling the candidate to promote and develop products and/or services within their own customer service environment and within the wider marketplace.

Unit aims

This unit aims to ensure the candidate is able to:

- understand that different sectors are regulated by different authorities and may be subject to sector specific legislation; compare products and services within a specific market sector and to identify the factors which influence customer choice
- promote a product or service with the aim of increasing market share and/or customer satisfaction.

What the candidate must know for the whole unit:

On completion of this unit and in order to undertake the practical activities, candidates will require a sound knowledge and understanding of products and services and be able to:

- give examples of unique selling points (USPs) and how they influence customer choice of products and services
- identify relevant and reliable sources of information (eg internet, competitors, trade associations, trade magazines, newspapers)
- describe examples of promoting a product or service (eg advertising, word of mouth, telesales, local newspapers/radio, television)
- describe the importance of evaluating promotions.

(The examples listed against each point are for illustrative purposes and are not exhaustive).

Delivery strategies

The content for this unit can be delivered in various ways; the following delivery strategies can be considered:

- **In the workplace** where the candidate can experience customer service in action with course content being taught at an appropriate in-house or external facility
- **In a college or other training establishment** where the candidate is being taught course content and where there is an opportunity to experience a realistic customer service environment eg reception, college library, restaurant/canteen areas, administration office, or placement in a local company.

Unit 103

Co-ordinate products and services for customers

Likely outcomes

The following points outline some of the likely outcomes from this unit; the list is not intended to be exhaustive. However, candidates should aim to demonstrate they can:

- identify regulatory authorities in different market sectors
- compare products and services within market sectors
- identify the factors which influence customer choice
- explain the role of mission statements and customer charters in the promotion of products or services
- explain the impact of USPs on customer choice
- understand the main factors which influence customers to use an organisation's products or services
- identify sources of information about products and services
- describe examples of promoting a product or service
- promote a product or service to increase market share and/or customer satisfaction eg via demonstrations, aide memoirs, writing slogans, local radio adverts
- explain the difference between features and benefits of a product or service
- describe how cost benefit analyses influence the method used to promote a product or service
- describe the importance of evaluating promotions.

The assessment tools for this unit are:

External assessment

- a synoptic test of short answer questions (graded pass/fail) to assess knowledge and understanding
- completion of an assignment (one per unit) to assess practical activities and under-pinning knowledge.

Internal assessment of the candidate's ability, knowledge and understanding could also be covered by:

- observation of performance
- witness statements
- 1:1 discussions
- work based projects eg case studies, simulation and role play
- evaluative and reflective reports including the completion of a learning log
- products and outcomes of work.

Unit 103

Co-ordinate products and services for customers

For this unit the likely resources required will be:

- sources of learning opportunities
- library/internet access
- notes/handouts on a variety of topics
- examples of advertising campaigns
- examples of trade magazines
- product and service literature from a variety of organisations
- examples of customer surveys on an organisation's promotional activities
- access to television & radio (commercials).

Unit 103

Co-ordinate products and services for customers

Rationale

The aim of this unit is to enable the candidate to promote and develop products and/or services with their customer service environment and within the wider market place.

Outcomes

There are 2 outcomes to this unit. The candidate will be able to

- 1 describe and influence the market sector
- 2 market and promote products and services.

Connection with other awards

This unit contributes towards the knowledge and understanding required for the following awards:

N/SVQ in Customer Service

307

ICS Customer Service Technical Certificate

2.1, 2.2, 2.3

3.2, 3.4, 3.5

Guided learning hours

It is recommended that 40 hours should be allocated for each of the units. This may be on a full time or part time basis.

Assessment

Assessment will be by means of an assignment covering practical activities and a synoptic multiple test covering underpinning knowledge of all three units.

Unit 103

Co-ordinate products and services for customers

Outcome 1

Describe and influence the market sector

On completion of this outcome the candidate will be able to understand that different sectors are regulated by different authorities and may be subject to sector specific legislation. They will be able to compare products and services within a specific market sector and to identify the factors which influence customer choice.

| Practical activities | Likely resources | Notes for guidance |
|--|--|---|
| Identify the regulatory authorities in the market sector | | <ul style="list-style-type: none">The candidate should be able to identify different market sectors and the regulatory authorities associated with them. They should understand each sector may be subject to sector specific legislation. |
| Compare products and services within the market sector | Examples of mission statements/ customer charters | <ul style="list-style-type: none">The candidate should be able to identify a range of products and services available within a market sectorComparisons should take into account how different organisations within the same sector approach the promotion of their products and servicesThe candidate should understand how mission statements or customer charters are used to describe an organisations service offerThe candidate should compare USPs of different organisations within the same sector. |
| Identify the factors that influence customer choice | | <ul style="list-style-type: none">The candidate should undertake activities which help them to see how the marketing and promotion of products and services is influenced by the factors which influence customer choice eg price, quality, convenience, reputation, flexibility, recommendation, loyaltyThe candidate should understand how features and benefits are used in promotions to influence customer choice. |

Unit 103

Co-ordinate products and services for customers

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|---|---|--|
| Give examples of USPs and explain how they influence customer choice of products and services | Examples of USPs of key organisations Notes on features and benefits | <ul style="list-style-type: none">• The candidate should be able to define what a USP is and how they are used to differentiate service offers from that of competitors or comparable organisations• The candidate should be able to explain how USPs are directly related to why customers choose to do business with organisations by using their products or services• The candidate needs to understand that customers buy benefits and solutions not products and should be familiar with the technique of selling features and benefits. |
| Identify relevant and reliable sources of information | Examples of trade magazines Product and service literature from a variety of organisations | <ul style="list-style-type: none">• The candidate should be able to identify sources of relevant and reliable information about products and services eg internet, competitors, trade associations, trade magazines, newspapers, catalogues, brochures, price-lists. |

Unit 103

Co-ordinate products and services

Outcome 2

Market and promote products and services

On completion of this outcome the candidate will be able to promote a product or service with the aim of increasing market share and/or customer satisfaction.

| Practical activities | Likely resources | Notes for guidance |
|--|---|--|
| Promote a product or service to increase market share and/or customer satisfaction | Access to materials and equipment for producing advertising/promotional materials | <ul style="list-style-type: none">• The candidate should undertake activities which enable them to promote a product or service. In doing so, consideration should be given to the factors which influence customer choice and the USP of their chosen product or service• The method chosen should show an understanding of the costs and benefits associated with the promotion• Methods could include demonstration of a product or service, aide memoirs; writing a slogan for use on local radio/in the print media, designing product or service information literature. |

To perform the range of practical activities for this outcome effectively, the candidate needs to have the following knowledge and understanding.

| Underpinning knowledge | Likely resources | Notes for guidance |
|--|--------------------------------|--|
| Describe examples of promoting a product or service | | <ul style="list-style-type: none">• The candidate should be able to describe ways of promoting a product or service eg advertising, word of mouth, print media such as local and national newspapers, telesales, TV, radio and other advertising campaigns• The candidate should be able to understand how organisations promote their products and services through the use of techniques such as selling benefits not features. |
| Describe how cost benefit analysis would influence the method used to promote a product or service | Notes on cost benefit analysis | <ul style="list-style-type: none">• The candidate should understand the principles of cost benefit analysis and how this impacts upon the method chosen to promote a product or service. |

Unit 103

Co-ordinate products and services

Underpinning knowledge

Describe the importance of evaluating promotions

Likely resources

Examples of customer surveys on promotional activities

Notes for guidance

- The candidate should understand feedback can be gathered from customers via customer surveys which seek feedback on promotional activities. The candidate needs to be aware of the organisational objectives of undertaking such a survey. They should also understand organisation's often offer incentives to customers to complete and return surveys of this nature
 - The candidate should be able to explain the impact of a promotional campaign on an organisation's ability to increase market share and/or customer satisfaction.
-

Links with other qualifications

The Level 3 Certificate in Customer Service should also provide evidence for some aspects of the underpinning knowledge of the units of the Customer Service S/NVQ Level 3.

Web sites

The following web sites offer opportunities for access to information, which may be of use to candidates and to tutors/assessors. Some websites enable users to order free leaflets/factsheets

www.smartscreen.co.uk

www.bbc.co.uk (See Watchdog pages for help with legal issues)

www.institutefcustomerservice.com

www.cre.gov.uk

www.dataprotection.gov.uk

www.eoc.org.uk

www.oft.gov.uk

www.realworkrealpay.info

Books

Further books for reference

Woods A, Hebron L, Bradley S – Customer Service Candidate Handbook S/NVQ Level 3 (Heinemann) 0 435 45227 4

Bradley S – Customer Service Candidate Handbook S/NVQ Level 2 (Heinemann) 0 435 45169 3

Gober M – The Art of Giving Quality Service (Mary Gober International) 0 9624563 0 6

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Certificate in Customer Service Level 3

Assessors' guide to assignments

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Certificate in Customer Service Level 3

Assessors' guide to assessments

Introduction to the Certificate in Customer Service

The Certificates in Customer Service are Vocationally Related Qualifications (VRQs). They have been designed by City & Guilds to meet our customers' needs for more modern, up-to-date and flexible qualifications. All these qualifications are accredited as part of the National Qualifications Framework. The emphasis is on 'learning by doing' and for this reason candidates are required to complete a number of assignments. These show candidates' attainment of practical skills, which imply their understanding of the knowledge required.

Qualifications within these awards are available for:

- Level 2 Certificate in Customer Service
- Level 3 Certificate in Customer Service

Within each Certificate in Customer Service award there are three core units. Assessment is by means of an assignment for each unit. For level 3 there will also be a fixed date short answer written assessment.

| Level 3 Units | Assessment components required |
|--|---|
| Unit 101 Customer service principles and Techniques | 4410-13-101 Assignment |
| Unit 102 Manage, develop and support the customer service environment | 4410-13-102 Assignment |
| Unit 103 Co-ordinate products and services for customers | 4410-13-103 |
| Units 101-103 Effective Customer Service Level 3 | 4410-13-104 Paper based written test m/c |

Centre/scheme approval

Centres wishing to offer City & Guilds qualifications must gain approval.

New centres must apply for centre and scheme approval.

Existing City & Guilds' centres will need to get specific scheme approval to run this award.

Full details of the process for both centre and scheme approval are given in *Providing City & Guilds qualifications – a guide to centre and scheme approval* which is available from City & Guilds' regional offices.

City & Guilds reserves the right to suspend an approved centre, or withdraw its approval from an approved centre to conduct a particular City & Guilds' scheme or particular City & Guilds' schemes, for reasons of debt, malpractice or for any reason that may be detrimental to the maintenance of authentic, reliable and valid qualifications or that may prejudice the name of City & Guilds.

Assignments

This guidance should be read in conjunction with specific guidance in each assignment. For each unit, there are a number of outcomes and each of these outcomes usually has a number of practical activities. Each assignment will provide opportunities for candidates to be assessed for a sample range of the practical activities required for the unit. Assignments will usually consist of several tasks. Evidence generated should be available to the External Verifier for scrutiny.

Assessors should ensure that candidates are aware of the standard they have to reach to achieve a pass. Assessors may discuss marking criteria with candidates, but the Marking & grading criteria for each assignment should not be given to candidates.

Assessors will need to check that all the requirements of a unit have been fulfilled. The units provide the opportunity for candidates to sign off that they have achieved a practical activity.

Completion of assignments

Assignments may be completed in any order. Assessors will decide when each candidate should complete each assignment and will be expected to organise the assignments in a logical order according to the requirements of the candidates and the course.

Each assignment contains:

- guidance for assessors comprising assignment specific guidance
- marking and grading criteria
- candidate's instructions – assignment specific.

Candidates will expect a reasonable amount of guidance on how to organise themselves in order to:

- accomplish tasks
- check that the evidence of the required underpinning knowledge has been produced.

Assessors are strongly advised to check and familiarise themselves with the requirements and workability of each assignment before it is issued to candidates. It is recommended that Assessors produce a worked copy of the assignment that their candidates are undertaking.

Appendices A, B and C are examples of documents that assessors may use to record the assignments the candidate has completed. The tracking documents in Appendix B is an example and may be used within your Quality Assurance process. It is an example only and you may wish to alter it to suit your existing documentation. It can also be used as a tracking document regarding Internal Verification/Quality Assurance checking. As detailed at the bottom, the IV/QAC can initial and date next to those candidates he/she has sampled in red.

You may also consider developing a similar document to track all units on one form. Whatever method you use to ensure quality checks are taking place, please send a copy of your proposed system to your External Verifier.

Grading of assignments

Grading of assignments is Pass / Fail.

Time allowance for assignments

Recommended time allowances have been allocated for each assignment; however, this does not form part of the marking criteria, and is for guidance purposes only.

Should Assessors find that the recommended time for an assignment is considerably at a variance with the time taken by candidates, they should contact their External Verifier in the first instance, who will advise accordingly and feed this information back to City & Guilds where appropriate.

Opportunities to repeat tasks within an assignment

If a candidate fails an assignment, or a task within an assignment they may repeat it. Assessors should allow seven days before any assignment or task is retaken.

NB: If the failed task is built upon the results of a previous task, this may also need to be repeated.

Health and Safety

The importance of safe working practices must always be stressed. Candidates have responsibilities for the safety of others as well as themselves. Anyone behaving in an unsafe manner must be stopped and suitable warning given. A candidate should not be allowed to continue working on an assignment if they have contravened these requirements.

Data protection, security

The centre should have available a copy of the Data Protection Act and bring its contents to the attention of candidates.

Centres should themselves ensure that all evidence produced by candidates is kept secure and that assignments are kept locked safely away until their use. It is the responsibility of the centre/assessor to ensure that the candidate taking an assignment /test is the correct person.

Ideally, centres should produce a written strategy outlining their procedures for ensuring the above takes place.

Keeping records

The candidate records that the centre must hold as required for regulatory compliance purposes must include:

- candidate name
- date of birth
- particular assessment requirements
- organisation
- assessor (s) name
- Quality Assurance Co-ordinator/Scheme Co-ordinator's name
- date of registration
- candidate enrolment number
- award title and level
- progress records, including unit accreditation and award completion dates.

The assessment records that the centre must hold for three years as required for regulatory compliance purposes include:

- name of the candidate
- units/components assessed, types of evidence submitted and assessment methods used
- names of each assessor involved with the units/components
- dates on which the assessments took place
- assessment locations
- assessment decisions made
- assessment plans, review and feedback records, assessment judgements.

For more detailed information on keeping records please refer to the City & Guilds document, *Ensuring Quality – policy and practice for externally verified assessment*, July 2001 Edition 12 and 13.

Copyright

Assessors should ensure that candidates are aware of the Copyright, Designs and Patents Act 1988, and the potential implications of using materials sourced from areas such as the Internet.

Types of evidence

Assignments have been written in a way to encourage candidates to produce different types of evidence, eg organisation charts, memos, reports.

It is important that candidates ensure their name and enrolment number is on all items of evidence handed in.

Quality assurance of assignments

These qualifications are Vocationally Related Qualifications (VRQs) and do not imply occupational competence. Centres are required to establish a system of internal verification/scheme co-ordination to monitor assessors' decisions. This means that the work of assessors involved in the qualification(s), must be monitored by a Quality Assurance Co-ordinator to ensure that assessors are applying the standards consistently throughout assessment activities. Quality Assurance Co-ordinators/Scheme Co-ordinators and External Verifiers will sample candidates' work to ascertain whether the evidence for an assignment is complete, and to ensure that the allocation of grades by assessors has been fair and beyond dispute. It is for this reason that the signature of both the assessor and the candidate is required on the Assignment Mark sheet.

Assessors must ensure that candidates understand why a particular assessment decision has been reached. Where candidates do not feel that the assessment decision has been fair, they should have the opportunity to access the normal appeals/complaints procedure of the centre/learning provider in the first instance, and if this does not resolve the situation, of the awarding body.

The use of grading for the assessment of practical work makes it possible for verifiers to use a system of sampling, but when doing so they have to be sure that the evidence is complete and that the allocation of marks and grades has been fair and beyond dispute. It is for this reason both the assessor's signature and that of the candidate is required on the final mark sheet. Quality Assurance Co-ordinators need to be sure candidates understand why the relevant grade has been allocated for the award.

Candidates' work may also be subject to external verification, which may be by a visit or by post. The External Verifier will ensure that:

- the Quality Assurance Co-ordinator is undertaking his/her responsibilities
- the Quality Assurance Co-ordinator is given prompt, accurate and constructive feedback on centre operation
- the Quality Assurance Co-ordinator is acting as a guardian of the 'standards'
- a report is written on centre activities for City & Guilds.

There will normally be one External Verification activity per centre, per year.

Guidance on qualifications/experience for trainers/learning providers

Trainers/learning providers should be technically competent in the areas, for which they are delivering training and should also have experience of providing training. This will be looked for at the approval stage and will be monitored by the external verification process.

Assessors/tutors should have at least two years' recent relevant experience in the specific area they will be assessing. If this experience is part-time it should be over a period of five years.

Assessors need to have a greater level of experience and understanding than those they are assessing.

In addition, assessors must demonstrate the ability to mark assignments using externally set criteria.

While the A/V Units are valued as a qualification they are **not** currently a requirement for assessors of these qualifications.

If a candidate's work is selected for external verification, samples of work must be available to the appointed External Verifier.

An External Verifier will visit the centre/learning provider and their role includes the following:

- ensuring that Quality Assurance Co-ordinators are undertaking their duties satisfactorily
- monitoring internal quality assurance systems and sampling assessment activities, methods and records
- acting as a source of advice and support
- promoting best practice
- providing prompt, accurate and constructive feedback to all relevant parties on the operation of centre's/learning provider's assessment systems.

Claiming certification

Candidates must be registered at the beginning of their course. Centres should submit registrations via the Walled Garden or on Form S (Registration), under the appropriate scheme/complex number. Assignments successfully achieved should be claimed using Form S (Results submission); component numbers must be entered on Form S, followed by P (Pass).

Details on all procedures will be found in the Directory of Vocational Awards, published annually by City & Guilds. This information also appears on City & Guilds website <http://www.city-and-guilds.co.uk>.

Appendix A

Summary of unit assignment achievements

Award

Candidate's name

Candidate enrolment number

Centre name and number

| Unit number | Assignment title | Time taken | Date | Candidate signature | Assessor signature |
|-------------|------------------|------------|------|---------------------|--------------------|
| | | | | | |
| | | | | | |
| | | | | | |

Confirmation of achievement for which certification is requested

Signature of Quality Assurance Co-ordinator

Date

NB: Where a Quality Assurance Co-ordinator's signing off the achievements and confirming this candidate has completed prior to certification they should sign and date where indicated.

If the Quality Assurance Co-ordinator has also 'sampled' one or more of the candidate's evidence, the Quality Assurance Co-ordinator should also initial against unit number in red.

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Appendix C

Example

4410-13 Level 3 Certificate in Customer Service

Witness testimony

Candidate's name

Centre name and number

I hereby testify that the above candidate has carried out all the requirements of the following assignment within the recommended time allowance of 3 hours. I further testify that all work submitted is authentic and the candidate's own.

| | |
|--------------------------------------|--|
| Unit number | |
| Assignment title and tasks completed | |
| Venue | |
| Date | |

Witness details

Name

Position/job title

Organisation/contact details

Candidate signature

Date

Witness signature

Date

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Assessor's assignment guide

Assignment number 4410-13-101

Version A

Customers Service Principles and Techniques

Unit number 101

Assessor's assignment guide (sample)

Notes for guidance

This assignment comprises the assessment for the practical activities for Unit 101 Customer Service Principles and Techniques.

The importance of safe working practices, the demands of the appropriate national and local Health and Safety legislation, associated regulations and Codes of Practice associated with the particular industry, must always be stressed. Candidates have responsibilities for maintaining the safety of others as well as their own. Anyone behaving in an unsafe manner must be stopped and suitable warnings given. A candidate should never be allowed to continue working on an assignment if they have contravened these requirements. This may seem rather strict but, each candidate must develop good practice for the workplace.

The following notes for guidance are provided to assist assessors in planning the delivery of this assignment to candidates.

1 Location of assignment

1.1 Any suitable location in the workplace or learning environment.

2 Equipment required for this assignment

2.1 No specific equipment is required for this assignment, however candidates might need access to information which has been previously researched.

4 Notes on the content of this assignment

4.1 This assignment can be taken as part of real work activity, or alternatively non-work based centres should provide access for candidates to administrative functions within the centre eg reception, office, library, catering department or realistic working environment.

4.2 Although there are accepted responses, this list is not exhaustive and suitable appropriate responses are acceptable.

4.3 See Candidate's instructions for details on assignments.

5 Evidence and recording

5.1 All work produced by the candidate should be kept together. The candidate is required to put their name and enrolment number on all pieces of work. Candidates will need to be able to organise their information clearly and coherently with accurate spelling and grammar. An error tolerance of 10% for spelling and 5% for grammar is allowed.

6 Time considerations

6.1 There is a recommended time allowance of 3 hours for the assignment, therefore all research activities should be carried out prior to the session.

- 6.2 A period of 7 days must have elapsed before an unsuccessful candidate can retake this assignment or a task within it.

7 Additional information

- 7.1 Answers given in the marking and grading criteria are indicative of the type of answers candidates should give. They are not definitive.

Guidance on delivering assignments in a non-worked based setting

Centres that are unable to deliver this assignment in a workplace should use an alternative realistic work environment eg library, reception, canteen/restaurant, college offices.

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Marking and grading criteria

(Not to be given to candidates)

Assignment number 4410-13-101

Version A

Customers Service Principles and Techniques

Unit number 101

Candidate name: _____

Enrolment no: _____

Signature: _____

Date: _____

Pass/Fail: _____

Assessor name: _____

Signature: _____

Date: _____

Internal Quality sampled by: _____

Signature: _____

Date: _____

Each of the following points should be ticked if satisfactorily met and crossed if not. If a point does not apply it should be crossed through and annotated with reasons why it is not applicable.

Pass – Candidates must meet all criteria shown as [].
An error tolerance of 10% for spelling and 5% for grammar is allowed.

| | Outcome Reference | Evidence & Recording | Marking criteria | Marking |
|---------------|--------------------------|---|---|-----------------------|
| Task A | 1 PA 2 | Examples of two different products and two different services Acceptable explanation | Correctly identified two products Correctly identified two service Coorectly explained the difference between a product and a service: a product is something manufactured, created, produced b service is to provide the support to, and the maintenance of, a product | [] [] [] |

Candidate name: _____

Candidate signature _____

Date _____

Assessor name: _____

Assessor signature _____

Date _____

| | Outcome Reference | Evidence & Recording | Marking criteria | Marking | |
|---------------|--------------------------|--|---|---------------------------|--|
| Task B | 1 PA 3 | <p>Examples of two words or phrases associated with marketing and two words or phrases associated with selling</p> <p>Acceptable explanation</p> | <p>Correctly identified two words of phrases associated with marketing:</p> <ul style="list-style-type: none"> a advertising b promoting c leaflet/brochure d slogan <p>Correctly identified two words or phrases associated with selling:</p> <ul style="list-style-type: none"> a negotiating b unique selling point c special offers d guarantee/warranty <p>Correctly explained the difference between marketing and selling:</p> <ul style="list-style-type: none"> a marketing is the promotion of a product or service b selling is providing the product or service to meet customer needs generated by marketing | [] [] [] | |

Candidate name:

Candidate signature

Date

Assessor name:

Assessor signature

Date

| | Outcome Reference | Evidence & Recording | Marking criteria | Marking | |
|---------------|--------------------------|--|---|----------------|--|
| Task C | 1 PA 3 1 UK 1 | Examples of two after sales services for a vacuum cleaner Examples of two unique selling points for a vacuum cleaner compared to a competitors vacuum cleaner | Gave two examples of after sales services for vacuum cleaner: a repair service b supply of parts c extended warranty/insurance d help line/desk Gave two examples of unique selling points for a vacuum cleaner compare to a competitors vacuum cleaner a price b packaging c performance d quality e availability f style | [] [] | |
| Task D | 1 UK 2 | List of four sources which would provide information on a plumbing service | Identified four sources which would provide information on a plumbing service: a internet b telephone/business directory c trade associations d trade magazines e newspapers f colleagues/friends | [] | |

Candidate name: _____

Candidate signature _____

Date _____

Assessor name: _____

Assessor signature _____

Date _____

| | Outcome Reference | Evidence & Recording | Marking criteria | Marking | |
|---------------|--------------------------------------|--|---|----------------|--|
| Task E | 2 PA 1 2 UK 1 2 UK 2 2 UK 3 | Examples of two reasons why evaluation of promotional method is necessary | Gave two reasons why evaluation of these methods of promotion is necessary: a to ensure that the method used was cost effective b to ensure that sales have increased due to the promotion c to identify any ways of improving or refining the promotion d to compare competitor sales figures | [] | |

Candidate name:

Candidate signature

Date

Assessor name:

Assessor signature

Date

Assignment – 101

Sample version

Candidate instructions

Customer Service Principles and Techniques – Level 3

Assignment – 4410-13-101 Customer Service Principles and Techniques

Version sample

You are advised to read all instructions carefully before starting work and to check with your assessor, if necessary, to ensure that you have fully understood what is required.

You must, at all times, observe all relevant Health and Safety precautions.

There is a time limit of 3 hours for this assignment

Introduction

This assignment is broken down into 5 parts:

- 1 Task A requires you to identify products and services and describe what makes a product different from a service.
- 2 Task B requires you to explain what is selling and what is marketing and identify what makes them different.
- 3 Task C requires you to give examples of after sales services that likely to be provided for a product and to identify its unique selling points.
- 4 Task D requires you to list likely sources of information on a product.
- 5 Task E requires you send a memo to your manager identifying methods of promoting your products and services and explaining why evaluation of a promotional campaign is necessary.

Note

- At the conclusion of this assignment, hand all paperwork to the test supervisor.
- Ensure that your name and enrolment number is on all documentation.
- If the assignment is taken over more than one period all paperwork must be returned to the test supervisor at the end of each sitting.

Task A

List two products and two services:

Product

Service

Briefly explain what is the difference between a product and a service:

Task B

List two words or phrases associated with marketing and two words or phrases associated with selling:

Marketing

Selling

Briefly explain what is the difference between marketing and selling:

Task C

A local manufacturer makes a range of vacuum cleaners. You have been asked to help in selling these vacuum cleaners.

Give two examples of after sales services for a vacuum cleaner:

Give two examples of unique selling points for your vacuum cleaner compared to a competitor's vacuum cleaner:

Give two reasons why evaluation of these methods of promotion is necessary:

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4410-13-314
Customer Service Level 3
Effective Customer Service

Sample Question Paper
1½ hours

You should have the following for this examination

- this question paper
- an answer book
- a pen with black or blue ink

Read each question carefully. Short answers only are required.

- Questions do **not** carry equal marks. The maximum marks for each question within a question are shown.
- Answer all **twenty** questions.

Unit 311 Customer service principles and techniques

311.1 Identify and negotiate solutions to solve customer problems which meet organisational constraints

- 1 List **four** factors that form customer expectations. (4 marks)
- 2 State the **one** Act or regulation that directly affects the customer service process (1 mark)
- 3 Describe briefly **two** procedures covered by an organisation's Code of Practice. (2 marks)
- 4 Describe **one** method of reducing a customer's frustration with a service. (1 mark)

311.2 Use effective communication skills with a range of customers

- 5 List **three** interpersonal skills. (3 marks)
- 6 Describe **three** barriers to effective communication. (3 marks)
- 7 Describe **two** disadvantages of using e-mail compared to the telephone. (2 marks)

311.3 Use a range of techniques to achieve customer satisfaction

- 8 Describe the relative benefits of using questionnaires to determine customer satisfaction. (2 marks)

Unit 312

Manage and support the customer service environment

312.1 Support and monitor the team to maintain performance, achieve targets and promote given practice

- 9 Explain why it is important to undertake training needs analysis (TNA) of team members. (2 marks)
- 10 Describe **two** areas where occupational standards might be used for benchmarking. (2 marks)
- 11 Describe **two** different approaches to training. (2 marks)

312.2 Manage and Develop effective customer service records

- 12 State **two** areas of relevant legislation which covers the keeping of records and distribution of information (2 marks)
- 13 Describe **one** advantage of using electronic record keeping (1 mark)

14 Describe **one** advantage of using electronic record keeping. (1 mark)

312.3 Support, review and evaluate the customer service environment

15 State **two** actions to resolve a customer complaint. (2 marks)

16 Describe **two** benefits of evaluating the customer service process. (2 marks)

Unit 313

Co-ordinate products and services for customers

313.1 Describe and influence the market sector

17 Identify **two** reasons for using a unique selling point (USP). (2 marks)

18 List **two** sources of information for an organisation's products or services. (2 marks)

313.2 Market and promote products and services

19 Describe **two** examples of promoting a product or service. (2 marks)

20 Describe briefly **two** reasons for evaluating promotions. (2 marks)

Total **40 marks**

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4410-13-104

Customer Service Level 3

Effective Customer Service

Sample Question Paper
Marking scheme
1½ hours

You should have the
following for this examination

- this question paper
- an answer book
- a pen with black or blue ink

Read each question carefully. Short answers only are required.

- Questions do **not** carry equal marks. The maximum marks for each question within a question are shown.
- Answer all **twenty** questions.

Unit 311

Customer service principles and techniques

311.1 Identify and negotiate solutions to solve customer problems which meet organisational constraints

- 1 List **four** factors that form customer expectations. (4 marks)
1 mark each max 4 marks
Quality, price, performance, Advertising, press coverage, word of mouth, previous visits; television
- 2 State the **one** Act or regulation that directly affects the customer service process. (1 mark)
1 mark max for one of
The Sale of Goods Act 1979;
Supply of Goods (Implied Terms) Act 1973;
Supply of Goods and Services Act 1982;
Sale and Supply of Goods Act 1994
- 3 Describe briefly **two** procedures covered by an organisation's Code of Practice. (2 marks)
1 mark each max 2 marks
Dealing with customers, dealing with complaints, resolving problems, conducting business.
- 4 Describe **one** method of reducing a customer's frustration with a service. (1 mark)
Description with 1 mark for any one of the following main points max 1 mark
Keeping them informed of any changes with products; keeping them informed of what's happening with their complaints; giving them firm deadlines for when they should receive information.

311.2 Use effective communication skills with a range of customers

- 5 List **three** interpersonal skills. (3 marks)
1 mark each max 3 marks
Assertiveness; listening; ability to use language appropriately to meet the needs of the individual; personal presentation
- 6 Describe **three** barriers to effective communication. (3 marks)
Description 1 mark for each point covered max 3 marks
Cultural differences; language; body language; not listening; environment
- 7 Describe **two** disadvantages of using e-mail compared to the telephone. (2 marks)
1 mark each max 2 marks
written confirmation, more time to consider response, more detailed information

311.3 Use a range of techniques to achieve customer satisfaction

- 8 Describe the relative benefits of using questionnaires to determine customer satisfaction. (2 marks)
For: cheap, carefully planned questions; demonstrates customer involvement
Against: no respondent control; often negatively biased; low return rate

Unit 312

Manage and support the customer service environment

312.1 Support and monitor the team to maintain performance, achieve targets and promote given practice

- 9 Explain why it is important to undertake training needs analysis (TNA) of team members. (2 marks)
Explanation 1 mark for each of the following salient points max 2 marks
To measure current competence against required competence for effective working, to identify possible learning and development needs to enable effective working, to ensure that team members have the necessary competence to be effective in their job
- 10 Describe **two** areas where occupational standards might be used for bench marking. (2 marks)
1 mark each max 2 marks
job performance, job description, target setting
- 11 Describe **two** different approaches to training. (2 marks)
1 mark each max 2 marks
Coaching, mentoring, face to face, work shadowing, e-learning, Distance learning, seminar attendance.

312.2 Develop and maintain effective customer service records

- 12 State **two** areas of relevant legislation which covers the keeping of records and distribution of information (2 marks)
1 mark each max 2 marks
Data protection laws, copyright laws
- 13 Describe **one** advantage of using electronic record keeping. (1 mark)
1 mark – max 1 mark
Advantages: secure storage, easy to update, information easily retrieved, little storage space (1 mark)
- 14 Describe **one** disadvantage of using electronic record keeping. (1 mark)
1 mark – max 1 mark
Disadvantages: requires equipment eg computer system, needs to be regularly backed up, someone needs to be responsible for inputting data and updating information, person keeping records needs to be IT literate.

312.3 Support, review and evaluate the customer service environment

- 15 State **two** actions to resolve a customer complaint. (2 marks)
1 mark – max 2 marks
Refund, replace, compensate.
- 16 Describe **two** benefits of evaluating the customer service process. (2 marks)
1 mark – max 2 marks
Monitors the achievement of targets, identifies areas that could be improved, identifies learning and development needs of staff

Unit 313

Co-ordinate products and services for customers

313.1 Describe and influence the market sector

- 17 Identify **two** reasons for using a unique selling point (USP). (2 marks)
1 mark – max 2 marks
to influence customer choice, to make on product/service stand out, to differentiate between products/services
- 18 List **two** sources of information for an organisation's products or services. (2 marks)
1 mark – max 2 marks
Website, trade journal, organisation newsletter, newspaper

313.2 Market and promote products and services

- 19 Describe **two** examples of promoting a product or service. (2 marks)
Description 1 mark – max 2 marks
Advertising, word of mouth, newspaper/magazine, radio campaigns, leaflets, posters, mail shot
- 20 Describe briefly **two** reasons for evaluating promotions. (2 marks)
Description 1 mark – max 2 marks
To measure the success of the promotion, to identify any improvements that can be made, to carry out a cost analysis

Total **40 marks**

Pass mark boundary 65-70%

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