

SVQ2 in Customer Service at SCQF Level 5 (4427-02)



Qualification handbook for centres

(This qualification is now closed for registrations, any new candidates from 1 September 2016 should be registered under 4427-20 SVQ in Customer Service at SCQF level 5)

www.cityandguilds.com
February 2011
Version 2.1 (September 2016)

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1 Introduction

This document contains the information that centres need to offer the following qualification:

Qualification title and level	SVQ2 in Customer Service at SCQF Level 5
City & Guilds qualification number	4427-02
Qualification accreditation number	GA4G 22
Last registration date	See Online Catalogue/Walled Garden for last dates
Last certification date	See Online Catalogue/Walled Garden for last dates

The level 2 City & Guilds SVQ in Customer Service qualification aims to build on or recognise good practice in customer service in any industry or to support their technical expertise in any job role, acknowledging the importance of effective communication and service delivery. Anyone dealing with internal or external customers will benefit from gaining knowledge, understanding and experience of dealing with routine and more difficult customers, confident in their use of language and of the processes designed to make their role effective. Candidates will have the opportunity to improve their own skills and to support others within their team or organisation in the development of excellent customer service.

Contacting the Sector Skills Body (SSB)

The Council for Administration (CFA)

Tel: 020 7091 9620

Website: www.cfa.uk.com

The Institute of Customer Service (ICS)

Tel: 01206 571 716

Fax: 01206 546 688

Website: www.instituteofcustomerservice.com

Version and date	Change detail	Section
Version 2.1 (September 2016)	Note added on front page to refer centres to 4427-20	Front page

1.1 Qualification structure

To achieve the **SVQ2 in Customer Service at SCQF Level 5**, learners must achieve:

Minimum of 7 units of which:

Two units must be completed from **Group A: Mandatory Core Units**

One unit must be selected from **Group B: Optional Units**

One unit must be selected from **Group C: Optional Unit**

One unit must be selected from **Group D: Optional Units**

One unit must be selected from **Group E: Optional Units**

One further unit can be selected from any of **Groups B, C, D and E**

The table below illustrates the unit titles and the credit value of each unit the qualification will be awarded to candidates successfully completing the required combination of units.

City & Guilds unit number	Group A Mandatory Units – Customer Service Foundations	SCQF Level	SCQF Credit
4427-101	Communicate using customer service language (F1)	4	4
4427-201	Follow the rules to deliver customer service (F2)	5	4
City & Guilds unit number	Group B Optional Units – Impression and Image	SCQF Level	SCQF Credit
4427-202	Communicate effectively with customers (A3)	5	5
4427-203	Give customers a positive impression of yourself and your organisation (A4)	5	5
4427-204	Promote additional services or products to customers (A5)	5	6
4427-205	Process information about customers (A6)	5	5
4427-206	Live up to the customer service promise (A7)	5	6
4427-207	Make customer service personal (A8)	5	6
4427-208	Go the extra mile in customer service (A9)	5	6
4427-209	Deal with customers face to face (A10)	5	5
4427-210	Deal with incoming telephone calls from customers (A11)	5	5
4427-211	Make telephone calls to customers (A12)	5	6
City & Guilds unit number	Group C Optional Units – Delivery	SCQF Level	SCQF Credit
4427-212	Deliver reliable customer service (B2)	5	5
4427-213	Deliver customer service on your customer’s premises (B3)	5	5
4427-214	Recognise diversity when delivering customer service (B4)	5	5
4427-215	Deal with customers across a language divide (B5)	5	8
4427-216	Use questioning techniques when delivering customer service (B6)	5	4
4427-217	Deal with customers using bespoke software (B7)	5	5
4427-218	Maintain customer service through effective hand over (B8)	5	4
City & Guilds unit number	Group D Optional Units – Handling Problems	SCQF Level	SCQF Credit
4427-219	Resolve customer service problems (C3)	5	6
4427-220	Deliver customer service to difficult customers (C4)	5	6
4427-310	Monitor and solve customer service problems (C5)	6	6
4427-311	Apply risk assessment to customer service (C6)	7	10
4427-312	Process customer service complaints (C7)	7	6

City & Guilds unit number	Group E Optional Units – Development and Improvement	SCQF Level	SCQF Credit
4427-221	Develop customer relationships (D1)	5	6
4427-222	Support customer service improvements (D2)	5	5
4427-223	Develop personal performance through delivering customer service (D3)	5	6
4427-224	Support customers using on-line customer services (D4)	5	5
4427-225	Buddy a colleague to develop their customer service skills (D5)	5	5
4427-226	Develop your own customer service skills through self-study (D6)	5	6
4427-227	Support customers using self-service technology (D7)	5	5

1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- Level 3 SVQ in Customer Service
- Level 2 Certificate in Customer Service
- Customer Service Apprenticeship
- SVQs in other work-related areas (for example Administration and other technical sectors)

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Generic candidate recording forms	www.cityandguilds.com
Centre guide	www.cityandguilds.com
Promotional materials	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 2 SVQ in Customer Service (4543) will be given automatic approval for the new Level 2 SVQ in Customer Service (4427-02). Existing sanctions will apply to the new qualifications.

Centres not already offering City & Guilds qualifications in this subject area

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 1 for further information.

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 1 for further information.

2.1 Resource requirements

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors, internal verifiers and external verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification. They must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have a thorough knowledge of the Level 2 National Occupational Standards for Customer Service, appropriate to the Level they are working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service SVQ at the Level they are working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and SVQs at the Level they are working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

The Assessor, IV and EV working at Level 2 must have:	This can be evidenced by:	A	IV	EV
A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
	explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓

The Assessor, IV and EV working at Level 2 must have:	This can be evidenced by:	A	IV	EV
Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the CFA		✓	✓
	explaining the differences between the 4 UK Countries	✓	✓	✓
Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
	attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
	reading Customer Service publications and articles	✓	✓	✓
	regularly looking at the CFA Website for new developments	✓	✓	✓
	keeping up to date with media news regarding Customer Service	✓	✓	✓
	joining the CFA	✓	✓	✓
Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service SVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
	achieving or be working towards the Level 2, 3 or 4 Customer Service SVQ	✓	✓	✓
Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and SVQs at Level 2	gathering feedback from a variety of employers and centres	✓	✓	✓
	curriculum vitae and references/testimonies	✓	✓	✓
Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Employer Direct Model

The CFA feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Customer Service SVQs and SVQs, particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the A1 and V1 qualifications. Wherever possible, the CFA works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the A1 and V1 units as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers.

The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Customer Service NOS and qualifications and their history of internal assessor/internal verifier expertise.

The organisation must:

- liaise with City & Guilds to attain approval to offer this model prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards for the A and V units which the qualifications are based on
- agree the mapping process with City & Guilds
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Realistic Working Environment (RWE)

The use of a Realistic Working Environment including work experience and work placement is allowed for all units in the Level 1 and Level 2 SVQ.

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

- a assessments must be carried out under realistic business pressures, using real customers and within a defined service offer
- b all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
- c candidates must be expected to achieve a volume of work comparable to normal business practices
- d the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards
- e account must be taken of any legislation or regulations in relation to the type of work that is being carried out
- f candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at the relevant level
- g candidates must show that their productivity reflects those found in the work situation being represented

- h customer perceptions of the RWE is similar to that found in the work situation being represented
- i the RWE is managed as a real work situation.

All other Units must be achieved in a **real working situation (either paid or voluntary)**

Age restrictions

There are no age limits attached to candidates undertaking the qualification unless this is a legal requirement of the process or the environment.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

For further information to assist with the planning and development of the programme, please refer to the following:

- Evidence requirements in each Customer Service unit
- Useful material is available on SmartScreen www.smartscreen.co.uk
- Useful material is available from www.cfa.uk.com

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessment:

- a portfolio of evidence which covers the assessment criteria for each unit or combination of units as applicable to the qualification being undertaken

Time constraints

The following time constraint must be applied to the assessment of this qualification:

- Assessment must be completed within the candidate's period of registration.

4.2 Evidence requirements

- Evidence requirements are included as part of the unit content in this document.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification.

RPL is allowed for this qualification and is not sector specific

This qualification is subject to an assessment strategy produced by the CFA August 2011 and can be located on their website **www.cfa.uk.com**

5 National Occupational Standards (NOS)

Availability of units

The Customer Service units for this qualification follow.

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- unit aim

Unit 101

Communicate using customer service language (F1)

Level: 4
Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

You need to be able to communicate with customers and colleagues using language and concepts that they can understand. This unit is about the language and basic principles that are the heart of customer service and the skills you need to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service. You need to be able to describe and explain the services or products that your organisation offers and how it delivers customer service. This means that you need to use the right language to describe customer service and describe why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Using that language, the unit will help you to understand how you and your job fit in. Everybody involved in customer service needs to know the customer service content of their job.

Outcomes of effective performance

When you communicate using customer service language you are able to:

1 Identify customers and their characteristics and expectations

- 1a. recognise typical customers and their expectations
- 1b. discuss customer expectations with colleagues using recognised customer service language
- 1c. follow procedures through which you and your colleagues deliver effective customer service.

2 Identify your organisation's services and products

- 2a. outline your organisation's services and products to customers
- 2b. list the information you need to deliver effective customer service and where that information can be found
- 2c. discuss with colleagues the part you play in delivering your organisation's service offer.

Knowledge and understanding

To be competent at communicating using customer service language you must know and understand:

- a. the differences between an internal customer and an external customer
- b. your organisation's services or products
- c. the connection between customer expectations and customer satisfaction in customer service
- d. why good customer service is important to any organisation
- e. why organisation procedures are important to good customer service
- f. why teamwork is central to good customer service
- g. the service offer of your organisation
- h. the part you play in delivering customer service
- i. who are your customers
- j. the main characteristics of typical customers that you deal with
- k. what impresses your customers and what annoys your customers
- l. who's who and who does what to deliver customer service in your organisation
- m. the kinds of information you need to give good service to customers
- n. how to find information about your organisation's services or products
- o. typical customer service problems in your work and who should be told about them
- p. how the way you behave affects your customer's service experience.

Unit 201

Follow the rules to deliver customer service (F2)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Customer Service Foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This unit requires you to show that you know and understand all of the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

Outcomes of effective performance

When you follow the rules to deliver customer service you must consistently:

1 Follow your organisation's customer service practices and procedures

- 1a. follow organisational practices and procedures that relate to your customer service work
- 1b. recognise the limits of what you are allowed to do when delivering customer service
- 1c. refer to somebody in authority when you need to
- 1d. work in a way that protects the security of customers and their property
- 1e. work in a way that protects the security of information about customers.

2 Follow legislation and external regulation that relate to customer service

- 2a. work in a way that is safe for your customers and your colleagues
- 2b. treat customers equally
- 2c. respect confidentiality relating to customers and the organisation
- 2d. work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- 2e. work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not.

Knowledge and understanding

To be competent at following the rules to deliver customer service you must know and understand:

- a. organisational practices and procedures that relate to your customer service work
- b. the limits of what you are allowed to do when delivering customer service
- c. when and how you should refer to somebody in authority about the rules for delivering customer service
- d. how you protect the security of customers and their property
- e. how you protect the security of information about customers
- f. your health and safety responsibilities as they relate to your customer service work
- g. your responsibilities to deliver customer service treating customers equally
- h. why it is important to respect customer and organisation confidentiality
- i. the main things you must do and not do in your job under legislation that affects your customer service work
- j. the main things that you must do and not do in your job under external regulations that affect your customer service work.

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you communicate effectively with customers you must consistently:

1 Communicate effectively with customers

- 1a. listen actively to what customers are saying
- 1b. identify the most important things that customers are telling you
- 1c. respond appropriately to what customers are telling you
- 1d. check that you understand what customers are telling you and make sure it is really what they mean
- 1e. summarise information for customers
- 1f. explain in a way that is clear and does not cause offence when you cannot help a customer
- 1g. use appropriate body language when communicating with customers
- 1h. read your customers' body language to help you understand their feelings and wishes
- 1i. deal with customers in a respectful, helpful and professional way at all times
- 1j. help to give good customer service by passing messages to colleagues.

Knowledge and understanding

To be competent at communicating effectively with customers you must know and understand:

- a. the difference between hearing and listening
- b. how to listen actively
- c. how to read both positive and negative body language
- d. how to use body language effectively
- e. how to use questions to check that you understand what customers are telling you
- f. the difference between negative and positive language
- g. how to summarise
- h. why it is important to speak clearly
- i. why it is important to use words your customer will understand
- j. how to communicate with customers who have language, dialect or accents that are different from yours
- k. why the way you say things and your tone of voice affect the way your customer experiences your customer service
- l. what information is helpful to pass on in messages to colleagues, so that customers receive good service.

Unit 203

Give customers a positive impression of yourself and your organisation (A4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you give customers a positive impression of yourself and your organisation you must consistently:

1 Establish rapport with customers

- 1a. meet your organisation's standards of appearance and behaviour
- 1b. greet your customer respectfully and in a friendly manner
- 1c. communicate with your customer in a way that makes them feel valued and respected
- 1d. identify and confirm your customer's expectations
- 1e. treat your customer courteously and helpfully at all times
- 1f. keep your customer informed and reassured
- 1g. adapt your behaviour to respond to different customer behaviour.

2 Respond appropriately to customers

- 2a. respond promptly to a customer seeking help
- 2b. choose the most appropriate way to communicate with your customer
- 2c. check with your customer that you have fully understood their expectations
- 2d. respond promptly and positively to your customer's questions and comments
- 2e. allow your customer time to consider your response and give further explanation when appropriate.

3 Communicate information to customers

- 3a. quickly find information that will help your customer
- 3b. give your customer information they need about the services or products offered by your organisation
- 3c. recognise information that your customer might find complicated and check whether they fully understand
- 3d. explain clearly to your customers any reasons why their expectations cannot be met.

Knowledge and understanding

To be competent at giving customers a positive impression of yourself and your organisation you must know and understand:

- a. your organisation's standards for appearance and behaviour
- b. your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- c. your organisation's rules and procedures regarding the methods of communication you use
- d. how to recognise when a customer is angry or confused
- e. your organisation's standards for timeliness in responding to customer questions and requests for information.

Unit 204

Promote additional services or products to customers (A5)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you promote additional services or products to customers you must consistently:

1 Identify additional services or products that are available

- 1a. update and develop your knowledge of your organisation's services or products
- 1b. check with others when you are unsure about new service or product details
- 1c. identify appropriate services or products that may interest your customer
- 1d. spot opportunities for offering your customer additional services or products that will improve their customer experience.

2 Inform customers about additional services or products

- 2a. choose the best time to inform your customer about additional services or products
- 2b. choose the best method of communication to introduce your customer to additional services or products
- 2c. give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- 2d. give your customer time to ask questions about the additional services or products.

3 Gain customer commitment to using additional services or products

- 3a. close the conversation if your customer shows no interest
- 3b. give information to move the situation forward when your customer shows interest
- 3c. secure customer agreement and check customer understanding of the delivery of the service or product
- 3d. take action to ensure prompt delivery of the additional services or products to your customer
- 3e. refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility.

Knowledge and understanding

To be competent at promoting additional services or products to customers you must know and understand:

- a. your organisation's procedures and systems for encouraging the use of additional services or products
- b. how additional services or products will benefit your customers
- c. how your customer's use of additional services or products will benefit your organisation
- d. the main factors that influence customers to use your services or products
- e. how to introduce additional services or products to customers, outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- f. how to give appropriate, balanced information to customers about services or products.

Level: 5

Credit value: 5

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What is the unit about?

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

Outcomes of effective performance

When you process information about customers you must consistently:

1 Collect information about customers

- 1a. collect and record new information about customers following your organisation's guidelines
- 1b. update existing information about customers
- 1c. record and store information about customers that is accurate, sufficient and relevant following organisational guidelines.

2 Select and retrieve information about customers

- 2a. respond promptly to authorised requests for information about customers
- 2b. select and retrieve relevant information for customers or colleagues following your organisation's guidelines.

3 Supply information about customers

- 3a. supply accurate and sufficient information about customers to meet your customers or colleagues' expectations
- 3b. choose the most appropriate way to supply information to your customers or colleagues
- 3c. confirm that your customers or colleagues have received and understood the customer information.

Knowledge and understanding

To be competent at processing information about customers you must know and understand:

- a. your organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
- b. types of personal information about customers that should and should not be kept on record
- c. how to collect information about customers efficiently and effectively
- d. how to operate the customer information storage system
- e. why processing information about customers correctly makes an important contribution to effective customer service
- f. the importance of attention to detail when processing information about customers
- g. legal and regulatory restrictions on the storage and use of customer data.

Level: 5

Credit value: 6

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What is the unit about?

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

Outcomes of effective performance

When you live up to the customer service promise you must consistently:

1 Understand and explain the customer service promise

- 1a. explain the key features of the service offer, vision and promise your organisation has made
- 1b. identify the role you can play to ensure that your customer believes that the service offer, vision and promise is being delivered
- 1c. explain the procedures and regulations your organisation follows to support the service offer, vision and promise
- 1d. devise and use phrases that reinforce the service offer, vision and promise
- 1e. identify and avoid phrases that might be used, but would not fit with the service offer, vision and promise
- 1f. identify moments and actions within the delivery of customer service that are particularly relevant to your customer's experience of the promise being delivered
- 1g. share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise.

2 Produce customer satisfaction by delivering the customer service promise

- 2a. ensure that your appearance and behaviour supports the organisation's service offer, vision and promise
- 2b. observe or listen to your customer closely to identify opportunities to reinforce their understanding of the service offer, vision and promise
- 2c. take actions to deliver customer service in a way that meets your customer's expectations and understanding of the service offer, vision and promise
- 2d. ensure that what you decide to do is realistic and in line with the service offer and promise
- 2e. be positive about and supportive of the service offer and promise.

Knowledge and understanding

To be competent at living up to the customer service promise you must know and understand:

- a. the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's service offer, vision and promise
- b. ways in which staff can contribute to communicating the service vision or promise to customers
- c. sales, marketing and/or public relations reasons for defining a service offer, vision and promise
- d. how words can be used and adapted to reflect a defined service offer, vision and promise
- e. how actions can be used and adapted to reflect a defined service offer, vision and promise.

Level: 5**Credit value: 6**

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What is the unit about?

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

Outcomes of effective performance

When you make customer service personal you must consistently:

1 Identify opportunities for making customer service personal

- 1a. identify which of your organisation's systems or procedures allows you to add a personal touch to your service
- 1b. observe and listen to your customer carefully for signs that will guide how you personalise the service
- 1c. let your customer know that you understand and that you are there to help
- 1d. identify opportunities to help or direct your customer outside of normal routines and procedures
- 1e. identify customers with particular needs who would especially appreciate personal service
- 1f. balance the time you take when giving individual attention to one customer with the needs and expectations of other customers
- 1g. make extra efforts to show how willing and able you are to give a more personal service.

2 Treat your customer as an individual

- 2a. greet and deal with your customer in a way that respects them as an individual
- 2b. focus your attention on the customer you are dealing with
- 2c. always communicate with your customer in a friendly and open way
- 2d. use your customer's name when it is known and appropriate
- 2e. follow your organisation's guidelines about giving your customer your own name and contact details
- 2f. concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected.

Knowledge and understanding

To be competent at making customer service personal you must know and understand:

- a. how use of your customer's name makes service more personal
- b. personality types and their receptiveness to personalised services
- c. types of personal information about customers that should and should not be kept on record
- d. features of personal service that are most appreciated by customers with individual needs
- e. body language and approaches to communication that are generally interpreted as open
- f. your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- g. your own preferences and comfort levels relating to how you are willing and able to personalise service.

Level: 5

Credit value: 6

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What is the unit about?

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

Outcomes of effective performance

When you go the extra mile in customer service you must consistently:

1 Distinguish between routine service standards and going the extra mile

- 1a. explain the service offer clearly and concisely
- 1b. identify your customer's expectations and needs
- 1c. match the service offer with your customer's expectations and needs and identify the key differences
- 1d. identify options for other actions that will give added value customer service and might impress your customer
- 1e. choose actions that are most appropriate to impress your customer.

2 Check that your extra mile ideas are feasible

- 2a. match your ideas for added value customer service against your authority to see them through
- 2b. check that your ideas for added value customer service are possible within your organisation's guidelines
- 2c. check that your ideas for added value customer service are possible within regulatory boundaries
- 2d. check that your ideas for added value customer service will not unreasonably affect the service to your other customers
- 2e. explain your ideas for added value service to a senior colleague or other appropriate authority.

3 Go the extra mile

- 3a. take action to go the extra mile in customer service
- 3b. ensure that your customer is aware of the added value of your actions
- 3c. monitor the effects of your added value actions to ensure that the service given to your other customers is not affected unreasonably
- 3d. note and pass on positive feedback from your customer about your actions
- 3e. suggest that an extra mile action becomes routine if you have seen it work several times and it could be accommodated within the service offer.

Knowledge and understanding

To be competent at going the extra mile in customer service you must know and understand:

- a. your organisation's service offer
- b. how customers form expectations of the service they will receive
- c. what types of service action most customers will see as adding value to the customer service they have already had
- d. your organisation's rules and procedures that determine your authority to go the extra mile
- e. relevant legislation and regulation that impact on your freedom to go the extra mile
- f. how your organisation receives customer service feedback on the types of customer experience that has impressed them
- g. your organisation's procedures for making changes in its service offer.

Level: 5

Credit value: 5

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What is the unit about?

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

Outcomes of effective performance

When you deal with customers face to face you must consistently:

1 Communicate effectively with your customer

- 1a. plan a conversation with your customer that has structure and clear direction
- 1b. hold a conversation with your customer that establishes rapport
- 1c. focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation
- 1d. explain your services or products and your organisation's service offer to your customer clearly and concisely
- 1e. adapt your communication to meet the individual needs of your customer
- 1f. anticipate your customer's requests and needs for information
- 1g. balance conflicting demands for your attention whilst maintaining rapport with your current customer
- 1h. calm down situations when one customer is adversely affecting the customer service enjoyed by other customers.

2 Improve the rapport with your customer through body language

- 2a. present a professional and respectful image when dealing with your customer
- 2b. show an awareness of your customer's needs for personal space
- 2c. focus your attention on your customer so that non-verbal signs do not betray disinterest, boredom or irritation
- 2d. ensure that your customer focus is not disrupted by colleagues
- 2e. observe all customers and the total customer service situation whilst maintaining rapport with your current customer
- 2f. observe your customer to read non-verbal clues about their wishes and expectations.

Knowledge and understanding

To be competent at dealing with customers face to face you must know and understand:

- a. the importance of speaking clearly and slowly when dealing with a customer face to face
- b. the importance of taking the time to listen carefully to what the customer is saying
- c. your organisation's procedures that impact on the way you are able to deal with your customers face to face
- d. the features and benefits of your organisation's services or products
- e. your organisation's service offer and how it affects the way you deal with customers face to face
- f. the principles of body language that enable you to interpret customer feelings without verbal communication
- g. the difference between behaving assertively, aggressively and passively
- h. why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
- i. the agreed and recognised signs in customer behaviour, in your organisation, that indicate that your customer expects a particular action by you.

Unit 210

Deal with incoming telephone calls from customers (A11)

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deal with incoming telephone calls from customers you must consistently:

1 Use communication systems effectively

- 1a. operate telecommunication equipment efficiently and effectively
- 1b. speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- 1c. listen carefully when collecting information from your customer
- 1d. select the information you need to record and store, following your organisation's guidelines
- 1e. update your customer records during or after the call to reflect the key points of the conversation.

2 Establish rapport with customers who are calling

- 2a. greet your customer following your organisation's guidelines
- 2b. listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call
- 2c. confirm the identity of your customer following organisational guidelines
- 2d. use effective and assertive questions to clarify your customer's requests.

3 Deal effectively with customer questions and requests

- 3a. identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- 3b. choose the option that is most likely to lead to customer satisfaction within the service offer
- 3c. give clear and concise information to customers in response to questions or requests
- 3d. use questions and answers to control the length of the conversation
- 3e. keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
- 3f. put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
- 3g. summarise the outcome of the call and any actions that you or your customer will take as a result
- 3h. check before the call is finished that your customer is content that all their questions or requests have been dealt with
- 3i. complete any follow up actions agreed during the call
- 3j. take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests
- 3k. ensure that promises to call back are kept.

Knowledge and understanding

To be competent at dealing with incoming telephone calls from customers you must know and understand:

- a. your organisation's guidelines and procedures for the use of telecommunication equipment
- b. how to operate your organisation's telecommunication equipment
- c. the importance of speaking clearly and slowly when dealing with customers by telephone
- d. the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- e. the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- f. what information it is important to note during or after telephone conversations with customers
- g. your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- h. the importance of keeping your customer informed if they are on hold during a call
- i. the importance of not talking across an open line
- j. what details should be included if taking a message for a colleague
- k. your organisation's guidelines and procedures for taking action to follow up calls made to customers
- l. your organisation's guidelines for handling abusive calls.

Level: 5**Credit value: 6**

This unit is part of the Customer Service Theme of Impression and Image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you make telephone calls to customers you must consistently:

1 Plan your calls effectively

- 1a. use all appropriate customer information to plan your call
- 1b. anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
- 1c. identify the objective of your call and the way in which you expect the call to end
- 1d. plan the opening part of your conversation with your customer and anticipate their possible responses.

2 Use communication systems effectively

- 2a. operate telecommunication equipment efficiently and effectively
- 2b. speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- 2c. listen carefully when collecting information from your customer
- 2d. select the information you need to record and store following your organisation's guidelines
- 2e. update your customer records during or after the call to reflect the key points of the conversation.

3 Make focussed calls to your customer

- 3a. open the conversation positively and establish a rapport with your customer
- 3b. confirm the identity of your customer following organisational guidelines
- 3c. ensure that your customer is aware of the purpose of your call as early as possible
- 3d. respond positively to queries and objections from your customer
- 3e. summarise the outcome of the call and any actions that you or your customer will take as a result
- 3f. complete any follow up actions agreed during the call.

Knowledge and understanding

To be competent at making telephone calls to customers you must know and understand:

- a. relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls
- b. your organisation's guidelines and procedures for the use of telecommunication technology
- c. how to operate your organisation's telecommunication technology
- d. the importance of speaking clearly and slowly when dealing with customers by telephone
- e. the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- f. the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- g. what information it is important to note during or after telephone conversations with customers
- h. your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- i. your organisation's guidelines and procedures for taking action to follow up calls made to customers.

Level: 5**Credit value: 5**

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deliver reliable customer service you must consistently:

1 Prepare to deal with your customers

- 1a. keep your knowledge of your organisation's services or products up-to-date
- 1b. ensure that the area you work in is tidy, safe and organised efficiently
- 1c. prepare and arrange everything you need to deal with your customers before your shift or period of work commences.

2 Give consistent service to customers

- 2a. make realistic customer service promises to your customers
- 2b. ensure that your promises balance the needs of your customers and your organisation
- 2c. keep your promises to your customers
- 2d. inform your customers if you cannot keep your promises due to unforeseen circumstances
- 2e. recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- 2f. keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation.

3 Check customer service delivery

- 3a. check that the service you have given meets your customers' needs and expectations
- 3b. identify when you could have given better service to your customers and how your service could have been improved
- 3c. share information with colleagues and service partners to maintain and improve your standards of service delivery.

Knowledge and understanding

To be competent at delivering reliable customer service you must know and understand:

- a. your organisation's services or products
- b. your organisation's procedures and systems for delivering customer service
- c. methods or systems for measuring an organisation's effectiveness in delivering customer service
- d. your organisation's procedures and systems for checking service delivery
- e. your organisation's requirements for health and safety in your area of work.

Unit 213

Deliver customer service on your customer's premises (B3)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deliver customer service on your customer's premises you must consistently:

1 Establish a rapport with your customer

- 1a. prepare for a visit to your customer's premises and ensure they know when and why you will be there
- 1b. identify yourself to your customer showing official identification whenever possible
- 1c. show a positive and friendly approach to the service you are about to give
- 1d. use language and behaviour that show respect for your customer
- 1e. explain to your customer exactly what you are going to do and approximately how long you expect the work to take
- 1f. listen to any concerns that your customer may have and reassure them
- 1g. keep your customer informed of progress and about any cause for delay that might take place
- 1h. keep your customer informed of any variation to the work that could involve additional time or cost
- 1i. consult your customer when you have to do work that they had not expected.

2 Combine customer service with your other skills and expertise

- 2a. show respect to your customer's premises and possessions by treating them with care
- 2b. make sure your customer is aware of your specialist technical skills
- 2c. take time to give your customer confidence in your knowledge and skills
- 2d. consider the customer service implications of each action and inform your customer of what will be involved
- 2e. inform your customer when you have finished and reinforce how the work has been handled professionally
- 2f. check that your customer is satisfied with the work and listen carefully to any feedback
- 2g. inform your customer of timescales if any follow up work is involved
- 2h. ensure that timescales for follow up work are kept
- 2i. keep your customer informed if timescales for follow up work are not going to be met
- 2j. explain clearly to your customer why you cannot do work that is not specified in the service offer
- 2k. ensure that your customer has the appropriate details to contact your organisation if they need to.

Knowledge and understanding

To be competent at delivering customer service on your customer's premises you must know and understand:

- a. what you can do to establish a rapport with customers
- b. the importance of sensitivity to people's feelings about their own premises and possessions
- c. the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- d. the insurance implications of working on your customer's premises
- e. the organisational procedures you would take if you cause any accidental damage on your customer's premises.

Unit 214

Recognise diversity when delivering customer service (B4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you recognise diversity when delivering customer service you must consistently:

1 Respect customers as individuals and promote equality in customer service

- 1a. observe verbal and non-verbal clues that provide information about your customer's expectations and needs
- 1b. identify and avoid features of stereotypes that might be applied to your customer and could carry the risk of causing offence
- 1c. identify aspects of your customer's appearance or communication which risk leading you to treat them differently
- 1d. consider aspects of your customer's appearance or communication in the light of your own beliefs about various groups of people that include your customer
- 1e. question your customer to ensure that the impressions you are forming about their expectations and wishes are based on sound evidence
- 1f. adjust your interpretation of your customer's expectations and wishes as a result of further evidence you have collected by talking to your customer.

2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers

- 2a. follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- 2b. show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
- 2c. vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- 2d. work with colleagues to identify consistent approaches that team members should adopt when dealing with particular group.

Knowledge and understanding

To be competent at recognising diversity when delivering customer service you must know and understand:

- a. the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- b. reasons why consideration of diversity and inclusion issues affect customer service
- c. organisational guidelines to make customer service inclusive for diverse groups of customers
- d. how to observe and interpret non-verbal clues
- e. how to listen actively for clues about your customer's expectations and needs
- f. techniques for obtaining additional information from customers through tactful and respectful questions
- g. behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
- h. how to impress specific groups of people to whom you regularly provide customer service.

Unit 215

Deal with customers across a language divide (B5)

Level: 5
Credit value: 8

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deal with customers across a language divide you must consistently:

1 Prepare to deal with customers with a different first language

- 1a. identify the language or languages other than your own that you are most likely to come across when dealing with customers
- 1b. learn a greeting, an expression of thanks and a farewell phrase in the language you expect to encounter
- 1c. identify a source of assistance with a language you expect to encounter when delivering customer service
- 1d. agree with colleagues informal signing options that may be used for key aspects of your services or products when dealing with somebody with a different first language
- 1e. log useful words and phrases to support your dealings with a customer with a different first language
- 1f. learn an appropriate phrase to explain to your customer in their first language that you do not speak that language fluently.

2 Deal with customers who speak a different first language from your own

- 2a. identify your customer's first language and indicate to them that you are aware of this
- 2b. establish the expectations of your customer regarding whether they expect to deal in your first language or theirs
- 2c. speak clearly and slowly if using a language which is not the first language for either you or your customer
- 2d. maintain a consistent tone and volume when dealing with somebody across a language divide
- 2e. listen closely to your customer to identify any words they may be using in a way that differs from the way you would generally use the same words
- 2f. check your understanding of specific words with your customer, using questions for clarification
- 2g. seek appropriate assistance from colleagues if you are unable to complete a customer transaction because of language barriers
- 2h. reword a question or explanation if your customer clearly does not understand your original wording
- 2i. use a few words of your customer's first language to create a rapport.

Knowledge and understanding

To be competent at dealing with customers across a language divide you must know and understand:

- a. the languages that you are most likely to encounter among groups of your customers
- b. how to greet, thank and say farewell to customers in their first languages
- c. the importance of dealing with customers in their first language if possible
- d. how to explain to a customer that you cannot hold an extended conversation in their first language
- e. the importance of tone, pace and volume when dealing with customers across a language divide
- f. possible sources of assistance to use when a language barrier demands additional language skills.

Unit 216

Use questioning techniques when delivering customer service (B6)

Level: 5

Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how you use questioning both in planned sequences and in spontaneous conversation to paint a picture of what your customer wants and how your organisation can deliver it. This unit is for you if you come into contact with your customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for you if you deal with customers remotely when it takes time to exchange questions and responses.

Outcomes of effective performance

When you use questioning techniques when delivering customer service you must consistently:

1 Establish rapport and identify customer concerns

- 1a. greet your customer sincerely and invite a full and open response
- 1b. use planned or spontaneous lines to indicate to your customer that you empathise with their initial enquiry
- 1c. invite more detailed explanation from your customer
- 1d. listen closely to your customer's responses to strengthen your understanding of their concerns
- 1e. use both open and closed questions to make appropriate connection with your customer and open the door to more detailed investigation
- 1f. identify and note your customer's feelings and mood in relation to the information you are seeking.

2 Seek detailed information from customers using questioning techniques

- 2a. follow a planned trail of questions to explore in detail customer concerns you have already identified
- 2b. hold a spontaneous conversation with your customer to explore in detail customer concerns you have already identified
- 2c. explain to your customer why you need the information you are asking for
- 2d. use probing and searching questions that draw on comments or words used by your customer
- 2e. thank your customer for the information in a way that encourages further open responses
- 2f. use pre-planned routing and trigger questions that lead your customer to respond in new areas
- 2g. follow organisational procedures to record your customer responses to inform future actions.

Knowledge and understanding

To be competent at using questioning techniques when delivering customer service you must know and understand:

- a. why establishing rapport makes it easier to draw information from customers
- b. ways to greet customers that immediately build rapport
- c. reasons for using planned question patterns to draw out particular information
- d. reasons for using spontaneous conversation to draw out particular information
- e. the importance of active listening when seeking detailed information from customers
- f. the differences between, and uses of, closed and open questions
- g. the importance of explaining to customers why information is needed
- h. why particular trigger questions are effective in gaining specific information.

Unit 217

Deal with customers using bespoke software (B7)

Level: 5
Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deal with customers using bespoke software you must consistently:

1 Prepare to deliver customer service using bespoke software

- 1a. sign on and open access to appropriate functions in the IT system
- 1b. navigate the architecture and geography of the customer service site to ensure you can access all appropriate areas
- 1c. explore screen or menu routes that are most appropriate for the customer service you are seeking to deliver
- 1d. ensure that you are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- 1e. prepare your work area to deliver customer service using bespoke software.

2 Deliver customer service using bespoke software

- 2a. identify your customer or the services or products they wish to access
- 2b. follow organisational procedures to step through the system in a way that responds to your customer's needs
- 2c. use search or other specialist functions within the software to respond to customer requests
- 2d. enter new records using the bespoke software system
- 2e. amend customer service records in the bespoke software system
- 2f. communicate with your customers in terms they can understand relating to the software system
- 2g. follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- 2h. interpret error messages and act on them to support your customer service
- 2i. refer your customer to a colleague following organisational procedures if you are unable to complete the transaction.

Knowledge and understanding

To be competent at dealing with customers using bespoke software you must know and understand:

- a. access and sign-on routines for the bespoke software system
- b. the architecture and geography of the bespoke software system
- c. different screen or menu routes that can be followed to meet customer requirements
- d. sources of support and help for the bespoke software including manuals, help screens and help lines
- e. the importance of preparing a work area before delivering customer service
- f. search or other enquiry facilities within the bespoke software system
- g. the importance of avoiding jargon and system terminology when communicating with customers
- h. ways to respond to error messages when using a bespoke software system
- i. referral points and sources of information when you are unable to meet customer needs using the bespoke software system.

Unit 218

Maintain customer service through effective hand over (B8)

Level: 5
Credit value: 4

This unit is part of the Customer Service Theme of Delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you maintain customer service through effective hand over you must consistently:

1 Agree joint responsibilities in a customer service team

- 1a. identify services or products you are involved in delivering that rely on effective teamwork
- 1b. identify steps in the customer service delivery process that rely on exchange of information between you and your colleagues
- 1c. agree with colleagues when it is right to pass responsibility for completing a customer service action to another
- 1d. agree with colleagues how information should be exchanged between you, to enable another to complete a customer service action
- 1e. identify ways of reminding yourself when you have passed responsibility to a colleague for completing a customer service action.

2 Check that customer service actions are seen through by working together with colleagues

- 2a. access reminders to identify when to check that a customer service action has been completed
- 2b. ensure that you are aware of all details of customer service actions your colleague was due to complete
- 2c. ask your colleague about the outcome of their completing the customer service action as agreed
- 2d. identify the next customer service actions if your colleagues has been unable to complete the actions you had previously agreed
- 2e. work with colleagues to review the way in which customer service actions are shared.

Knowledge and understanding

To be competent at maintaining customer service through effective hand over you must know and understand:

- a. your organisation's customer service procedures for the services or products you are involved in delivering
- b. the appropriate colleagues to pass responsibility to for completing particular customer service actions
- c. ways of ensuring that information is passed between you and your colleagues effectively
- d. ways to remind yourself of actions that need to be checked when you have passed on responsibility to a colleague
- e. the importance of checking tactfully with a colleague whether they have completed the customer service actions you were expecting
- f. opportunities for contributing to review the way customer service actions are shared in customer service processes.

Level: 5**Credit value: 6**

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you resolve customer service problems you must consistently:

1 Spot customer service problems

- 1a. listen carefully to your customers about any problem they have raised
- 1b. ask your customers about the problem to check your understanding
- 1c. recognise repeated problems and alert the appropriate authority
- 1d. share customer feedback with others to identify potential problems before they happen
- 1e. identify problems with systems and procedures before they begin to affect your customers.

2 Pick the best solution to resolve customer service problems

- 2a. identify the options for resolving a customer service problem
- 2b. work with others to identify and confirm the options to resolve a customer service problem
- 2c. work out the advantages and disadvantages of each option for your customer and your organisation
- 2d. pick the best option for your customer and your organisation
- 2e. identify, for your customer, other ways that problems may be resolved if you are unable to help.

3 Take action to resolve customer service problems

- 3a. discuss and agree the options for solving the problem with your customer
- 3b. take action to implement the option agreed with your customer
- 3c. work with others and your customer to make sure that any promises related to solving the problem are kept
- 3d. keep your customer fully informed about what is happening to resolve the problem
- 3e. check with your customer to make sure the problem has been resolved to their satisfaction
- 3f. give clear reasons to your customer when the problem has not been resolved to their satisfaction.

Knowledge and understanding

To be competent at resolving customer service problems you must know and understand:

- a. organisational procedures and systems for dealing with customer service problems
- b. how to defuse potentially stressful situations
- c. how to negotiate
- d. the limitations of what you can offer your customer
- e. types of action that may make a customer problem worse and should be avoided.

Unit 220

Deliver customer service to difficult customers (C4)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you deliver customer service to difficult customers you must consistently:

1 Recognise when customers may be difficult to deal with

- 1a. recognise types of customer behaviour that are difficult to deal with
- 1b. identify aspects of your organisation's services or products that make it difficult to deal with customers
- 1c. identify the signs and signals that indicate a customer may be difficult to deal with
- 1d. put yourself in your customer's position and see the situation from their point of view
- 1e. identify reasons why your customers may be behaving in a way that is difficult to deal with
- 1f. recognise the limits of difficult customer behaviour that your organisation will tolerate
- 1g. identify things that you may do or say that will provoke difficult responses from your customer.

2 Deal with difficult customers

- 2a. listen patiently to what your customer wants to tell you
- 2b. use direct and factual questions about your customer's feelings and what has happened to identify what might satisfy them
- 2c. check your understanding of your customer's concerns by describing your view of the situation and options that might be available
- 2d. express empathy with your customer without necessarily admitting fault on the part of your organisation
- 2e. give clear statements or explanations of your organisation's position
- 2f. agree a way forward that balances customer satisfaction with the needs of your organisation
- 2g. enlist help from colleagues if options for action are outside of your authority
- 2h. summarise clearly actions to be taken and reasons for those actions to complete the customer transaction
- 2i. advise your manager, or the appropriate colleague(s), if your customer is likely to re-open the matter with them
- 2j. take any necessary action to protect your own safety or that of other customers or colleagues from a difficult customer.

Knowledge and understanding

To be competent at delivering customer service to difficult customers you must know and understand:

- a. the types of customer behaviour that you personally find difficult to deal with
- b. reasons why some aspect of your organisation's services or products may provoke difficult behaviour from customers
- c. reasons why your customer's own actions may cause them to behave in a way that is difficult to deal with
- d. the meaning of having empathy for a customer's feelings
- e. who can be asked for help when dealing with a difficult customer
- f. the difference between assertive, aggressive and passive behaviour
- g. the importance of not simply quoting your organisation's rules and procedures to counter your customer's difficult behaviour
- h. your organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed
- i. the importance of giving your manager or the appropriate colleagues notice of any further approaches from a difficult customer
- j. when it might be necessary to take action to protect your own safety or that of other customers or colleagues from a difficult customer.

Level: 5

Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you develop customer relationships you must consistently:

1 Build your customer's confidence that the service you give will be excellent

- 1a. show that you know and understand your organisation's services or products
- 1b. allocate the time you take to deal with your customer following organisational guidelines
- 1c. reassure your customer that you are doing everything possible to keep the service promises made by your organisation.

2 Meet the expectations of your customers

- 2a. recognise when there may be a conflict between your customer's expectations and your organisation's service offer
- 2b. balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
- 2c. work effectively with others to resolve any difficulties in meeting your customer's expectations.

3 Develop the long-term relationship between your customer and your organisation

- 3a. give additional help and information to your customer in response to their questions and comments about your organisation's services or products
- 3b. discuss expectations with your customer and explain how these compare with your organisation's services or products
- 3c. advise others of feedback received from your customer
- 3d. identify new ways of helping your customers based on the feedback they have given you
- 3e. identify added value that your organisation could offer to long-term customers.

Knowledge and understanding

To be competent at developing customer relationships you must know and understand:

- a. the importance of customer retention
- b. how your own behaviour affects the behaviour of the customer
- c. how to behave assertively and professionally at all times
- d. how to defuse potentially stressful situations
- e. the limitations of your organisation's service offer
- f. how customer expectations may change as they deal with your organisation
- g. the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- h. the cost implications of bringing in new customers as opposed to retaining existing customers
- i. who to refer to when considering any variation to your organisation's service offer.

Level: 5

Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you support customer service improvements you must consistently:

1 Use feedback to identify potential customer service improvements

- 1a. gather informal feedback from your customers
- 1b. use your organisation's procedures to collect feedback from your customers
- 1c. use the information from your customers to develop a better understanding of their customer service experience
- 1d. identify ways the service you give could be improved based on information you have gathered
- 1e. share your ideas for improving customer service with colleagues.

2 Implement changes in customer service

- 2a. identify a possible change that could be made to improve customer service
- 2b. present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- 2c. carry out changes to customer service procedures based on your own idea or proposed by your organisation
- 2d. keep your customers informed of changes to customer service
- 2e. give customers a positive impression of changes that have been made
- 2f. work positively with others to support customer service changes.

3 Assist with the evaluation of changes in customer service

- 3a. discuss with others how changes to customer service are working
- 3b. work with others to identify any negative effects of changes and how these can be avoided.

Knowledge and understanding

To be competent at supporting customer service improvements you must know and understand:

- a. how customer experience is influenced by the way service is delivered
- b. how customer feedback is obtained
- c. how to work with others to identify and support change in the way service is delivered
- d. why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them.

Unit 223

Develop personal performance through delivering customer service (D3)

Level: 5

Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you develop personal performance through delivering customer service you must consistently:

1 Review performance in your customer service role

- 1a. work with an appropriate person to establish what you need to know, understand and be able to do, to work effectively in your customer service role
- 1b. identify and review situations from your own positive and negative experiences as a customer
- 1c. carry out a self assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs.

2 Prepare a personal development plan and keep it up to date

- 2a. agree your strengths, weaknesses and development needs with an appropriate person
- 2b. work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role
- 2c. develop a customer service personal development plan
- 2d. regularly review your progress towards your objectives with an appropriate person.

3 Undertake development activities and obtain feedback on your customer service performance

- 3a. complete development activities identified in your customer service personal development plan
- 3b. use your day to day experiences with your customers and your own experiences as a customer, to develop your customer service performance
- 3c. obtain feedback from an appropriate person about your customer service performance
- 3d. review and update your customer service personal development plan.

Knowledge and understanding

To be competent at developing personal performance through delivering customer service you must know and understand:

- a. your organisation's systems and procedures for developing personal performance in customer service
- b. how your behaviour has an effect on the behaviour of others
- c. how effective learning depends on a process of planning, doing and reviewing
- d. how to review effectively your personal strengths and development needs
- e. how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service
- f. how to access sources of information and support for your learning
- g. how to obtain useful and constructive personal feedback from others
- h. how to respond positively to personal feedback.

Unit 224

Support customers using on-line customer services (D4)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you support customers using on-line customer services you must consistently:

1 Establish the type and level of support your customer needs to achieve on-line customer service

- 1a. ensure that you are completely familiar and up-to-date and with the on-line services that your customers use
- 1b. listen carefully to what your customer is trying to achieve
- 1c. listen carefully to what your customer is having difficulties with
- 1d. question your customer to discover their degree of familiarity with the system
- 1e. offer your customer the option of trying the on-line approach once more
- 1f. agree with your customer the exact nature of their problem and steps that may be taken to overcome it.

2 Support on-line customer service in conversation with your customer

- 2a. explore the on-line customer system in order to develop your own knowledge and skills in its use
- 2b. step through the screen sequence with your customer whilst allowing them to operate the system for themselves
- 2c. address your customer in an understanding and supportive manner
- 2d. explain to your customer why certain steps are required in the process
- 2e. offer the options to your customer of stepping them through the process or completing the transaction yourself
- 2f. promote access to additional services or products when supporting customers on-line.

Knowledge and understanding

To be competent at supporting customers using on-line customer services you must know and understand:

- a. how your organisation's system for on-line service delivery works
- b. the importance of close active listening to discover what your customer is trying to achieve
- c. ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
- d. why it is generally preferable for your customer to complete a transaction for themselves
- e. the importance of building customer confidence in using the on-line system by supporting and encouraging
- f. the benefits and drawbacks of talking a customer through use of the system or completing the transaction yourself
- g. additional services or products that may be promoted to on-line customers.

Unit 225

Buddy a colleague to develop their customer service skills (D5)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you buddy a colleague to develop their customer service skills you must consistently:

1 Plan and prepare to buddy a colleague

- 1a. agree with your buddy colleague aspects of their work which may benefit most from your buddying support
- 1b. confirm your understanding of your buddy colleague's job tasks and responsibilities using reliable sources
- 1c. clarify the customer service image and impression your buddy colleague should present in their job
- 1d. arrange times when it will be most helpful to work alongside your buddy colleague
- 1e. plan details of a buddy session to support your colleague on the job.

2 Support your buddy colleague on the job

- 2a. agree with your buddy colleague where you will be placed near them when buddying them on the job
- 2b. ensure your presence when your buddy is dealing with customers does not detract from effective customer service
- 2c. carry out customer service tasks in the presence of your buddy colleague to set an example they can follow
- 2d. observe your buddy colleague closely to identify what they do well and areas in which they could improve
- 2e. discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
- 2f. praise your buddy colleague on aspects of their work which they have carried out well
- 2g. explain to your buddy colleague ways in which they can improve their customer service performance
- 2h. make notes on your buddy colleague's strengths and areas for development that you can discuss with them.

3 Provide buddy support off the job

- 3a. arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers
- 3b. identify areas of general interest that help to establish rapport with your buddy colleague
- 3c. use notes made when observing your buddy colleague to discuss positive and negative aspects of their performance
- 3d. agree actions your buddy colleague can take to improve their customer service performance
- 3e. offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience.

Knowledge and understanding

To be competent at buddying a colleague, to develop their customer service skills, you must know and understand:

- a. the tasks in your buddy colleague's job
- b. areas of the job that benefit most from buddying support
- c. the customer service image and impression that should be presented in your buddy colleague's job
- d. the best times at which to work alongside your buddy colleague
- e. ways to work alongside your buddy colleague without intruding on the customer relationship
- f. techniques for giving positive feedback and constructive criticism to your buddy colleague
- g. the importance of establishing an effective rapport with your buddy colleague
- h. options for actions your buddy colleague can take to improve their customer service performance.

Unit 226

Develop your own customer service skills through self-study (D6)

Level: 5
Credit value: 6

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Much of the responsibility for developing customer service knowledge and skills rests on you as an individual. There are numerous sources of information that can be used but which need to be located and linked with your customer service role. When located, the learning materials must be used to good effect in an organised manner. This unit is about locating and using materials to help you learn in the course of your work. It is the right unit for you if you need to take responsibility for your own self-development in relation to customer service skills.

Outcomes of effective performance

When you develop your own customer service skills through self-study you must consistently:

1 Find ways to learn more about customer service and your job

- 1a. identify different sources of information and support that will help you to develop your customer service knowledge and skills
- 1b. agree with your line manager, your mentor or others doing a similar job, the best sources to use for self-development of your customer service knowledge and skills
- 1c. take action to remind yourself to check on sources of information and support
- 1d. search for additional sources of information to support your customer service learning
- 1e. store materials that support self-study for future use
- 1f. plan time to study the self-study materials you have collected.

2 Use sources of self-development to extend your customer service skills and knowledge

- 2a. access organisational update information to extend your knowledge of products and services
- 2b. access organisational information to learn more about the way your role contributes to customer service
- 2c. monitor publications to identify ideas and new developments in customer service which you could apply in your work
- 2d. study collected information to develop your own customer service knowledge and skills
- 2e. take action, resulting from your learning, to change the way you deal with customers
- 2f. share your plans for action with your line manager, your mentor or others doing a similar job, to seek their ideas for further options
- 2g. record actions you take to learn more about customer service and identify those which have the most positive effects.

Knowledge and understanding

To be competent at developing your own customer service skills through self-study you must know and understand:

- a. ways to locate information updating you on services and products in your organisation
- b. sources of information about customer service knowledge and skills that will help you to develop
- c. ways to store information that you use to develop your customer service skills
- d. the importance of focus when self-studying to improve your customer service knowledge and skills
- e. ways to convert information or ideas you have found through self-study into practical customer service actions
- f. the value of discussing your learning with line manager, your mentor or others doing a similar job
- g. methods of recording actions to improve your customer service skills which have had positive effects.

Unit 227

Support customers using self-service technology (D7)

Level: 5
Credit value: 5

This unit is part of the Customer Service Theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you support customers using self-service technology you must consistently:

1 Identify the type of help needed by a customer using self-service technology

- 1a. prepare a standard demonstration of using the self-service equipment
- 1b. prepare to answer frequently asked questions about the operation of the self-service equipment
- 1c. identify signs of when a customer is having difficulty with the self service equipment
- 1d. choose an appropriate style and level of intervention to help a customer who is having trouble using the self-service equipment.

2 Assist a customer using self-service technology

- 2a. maintain a professional, polite and approachable manner while you observe customers using self-help technology
- 2b. demonstrate use of the self-service equipment to a customer
- 2c. respond to a request for help from a customer using self-help equipment
- 2d. make use of staff override options to clear self-service equipment for use by customers
- 2e. talk a customer through use of the self-service equipment whilst allowing them to operate it
- 2f. invite a customer to repeat the operation of the self-service equipment if that helps them to learn
- 2g. make positive and encouraging comments to a customer who is learning to use the self-service equipment
- 2h. explain to your customer why certain actions and steps are needed to operate self service equipment
- 2i. troubleshoot problems with self-service equipment and report errors and issues to appropriate people.

Knowledge and understanding

To be competent at supporting customers using self-service technology you must know and understand:

- a. reasons why your organisation chooses to offer customers self-service equipment
- b. all aspects of normal operation of the customer self-service equipment
- c. frequently asked questions about operation of the self-service equipment and effective answers to those questions
- d. techniques for giving an effective demonstration of self-service equipment
- e. signals and signs that a customer needs help with self-service equipment
- f. organisational procedures for using staff intervention to clear self-service equipment
- g. the importance of building customer confidence in using self-service equipment
- h. organisational procedures for dealing with self-service equipment problems.

Unit 310

Monitor and solve customer service problems (C5)

Level: 6
Credit value: 6

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Outcomes of effective performance

When you monitor and solve customer service problems you must consistently:

1 Solve immediate customer service problems

- 1a. respond positively to customer service problems following organisational guidelines
- 1b. solve customer service problems when you have sufficient authority
- 1c. work with others to solve customer service problems
- 1d. keep customers informed of the actions being taken
- 1e. check with customers that they are comfortable with the actions being taken
- 1f. solve problems with service systems and procedures that might affect customers before they become aware of them
- 1g. inform managers and colleagues of the steps taken to solve specific problems.

2 Identify repeated customer service problems and options for solving them

- 2a. identify repeated customer service problems
- 2b. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- 2c. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation.

3 Take action to avoid the repetition of customer service problems

- 3a. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- 3b. action your agreed solution
- 3c. keep your customers informed, in a positive and clear manner, of steps being taken to solve any service problems
- 3d. monitor the changes you have made and adjust them if appropriate.

Knowledge and understanding

To be competent at monitoring and solving customer service problems you must know and understand:

- a. organisational procedures and systems for dealing with customer service problems
- b. organisational procedures and systems for identifying repeated customer service problems
- c. how the successful resolution of customer service problems contributes to customer loyalty with the external customer, and improved working relationships with service partners or internal customers
- d. how to negotiate with and reassure customers while their problems are being solved.

Unit 311

Apply risk assessment to customer service (C6)

Level: 7
Credit value: 10

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

This unit is about how formal or informal risk assessment techniques can be used to reduce any risks involved in the provision of customer service. The provision of customer service involves a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables you to take actions to minimise risks.

Outcomes of effective performance

When you apply risk assessment to customer service you must consistently:

1 Analyse customer service processes for risk

- 1a. identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint customers
- 1b. identify the financial risks for each stage of the customer service process
- 1c. identify the reputational risks for each stage of the customer service process
- 1d. identify the health and safety risks for each stage of the customer service process
- 1e. identify the risk of delivering sub-standard services or products for each stage of the customer service process
- 1f. ensure that your customers are aware of any risks that might impact on them
- 1g. develop staff awareness of the risks you have identified.

2 Assess customer service risks and take appropriate actions

- 2a. assess the probabilities of each risk that you have identified
- 2b. assess the consequence of each risk in terms of finance, reputation and health and safety
- 2c. classify each risk as high, medium or low taking into account its probability and consequences
- 2d. work with colleagues to identify any actions that might be taken to reduce risk
- 2e. take appropriate actions to minimise the overall customer service risk profile by adapting procedures.

Knowledge and understanding

To be competent at applying risk assessment to customer service you must know and understand:

- a. your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)
- b. risk assessment techniques
- c. how to evaluate risk according to probability of occurrence and consequences of occurrence
- d. the nature of potential customer service risks including financial, reputational and health and safety risks
- e. cost/benefit analysis
- f. SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis.

Level: 7
Credit value: 10

This unit is part of the Customer Service Theme of Handling Problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

What is the unit about?

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

Outcomes of effective performance

When you process customer service complaints you must consistently:

1 Recognise the signs that a query or problem is about to produce a complaint

- 1a. identify signs that a customer is becoming dissatisfied with the customer service of your organisation
- 1b. take action to change the situation so that the query or problem does not result in a complaint
- 1c. take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made.

2 Deal with a complaint effectively

- 2a. ensure that you have a clear understanding of the nature and details of the complaint
- 2b. investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- 2c. identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
- 2d. assess the risks to your organisation of choosing each option
- 2e. report the findings of your investigation to your customer and offer your chosen solution
- 2f. escalate the complaint by involving more senior members of your organisation, or an independent third party, if there is sufficient reason to do so
- 2g. give feedback to other colleagues involved, which will help them avoid future complaints
- 2h. keep clear records of the way the complaint has been handled to avoid later misunderstandings.

Knowledge and understanding

To be competent at processing customer service complaints you must know and understand:

- a. how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- b. why dealing with complaints is an inevitable part of delivering customer service
- c. organisational procedures for dealing with complaints
- d. how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- e. the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- f. when to escalate a complaint by involving more senior members of the organisation or an independent third party
- g. the cost and regulatory implications of admitting liability for an error made by your organisation
- h. how to spot and interpret signals that your customer may be considering making a complaint
- i. techniques for handling conflict
- j. the importance of dealing with a complaint promptly
- k. why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- l. how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied.

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLA assessments.

Useful contacts

UK learners

E: learnersupport@cityandguilds.com

General qualification information

International learners

F: +44 (0)20 7294 2413

General qualification information

E: intcg@cityandguilds.com

Centres

F: +44 (0)20 7294 2413

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

E: centresupport@cityandguilds.com

Single subject qualifications

F: +44 (0)20 7294 2413

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

F: +44 (0)20 7294 2413

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

E: intops@cityandguilds.com

Walled Garden

F: +44 (0)20 7294 2413

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

E: walledgarden@cityandguilds.com

Employer

T: +44 (0)121 503 8993

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

E: business_unit@cityandguilds.com

Publications

F: +44 (0)20 7294 2413

Logbooks, Centre documents, Forms, Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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