Skillsfirst Awards

handbook

Level 2 Diploma in Customer Service (QCF)

CUSD2

Skillsfirst
growth through learning

Contents

1.0 Introduction

1.1 Skillsfirst Awards is an awarding organisation specialising in the provision of vocational qualifications across a range of occupational areas.

1.2 Skillsfirst Awards recognises the need for industry to have fully trained and qualified staff – reliably qualified to recognised industry standards.

1.3 The following handbook provides the learning outcomes and assessment strategy for the delivery of the Level 2 Diploma in Customer Service (QCF). The handbook is a live document and will be updated should there be any incremental change made. Centres will be informed electronically when changes are made and it will be the responsibility of any recognised centre to ensure the most up to date version of the handbook is used. The document also provides details of the administrative procedures, requirements and responsibilities that are associated with the delivery of vocational qualifications.

The handbook is available on the Skillsfirst Awards website www.skillsfirst.co.uk

1.4 This document is copyright but can be copied by any of our recognised centres for the purpose of assessing learners and may also be copied by learners for their own use.

1.5 All learners should be provided with a copy of the Skillsfirst qualification handbook together with the Skillsfirst learner guide. This document can be found on our web-site at www.skillsfirst.co.uk

2.0 Skillsfirst Awards

2.1 Data protection

Skillsfirst Awards takes the protection of data seriously and to this end has developed a data protection statement outlining how Skillsfirst and our centres, comply with the current legislation on data protection. It is important for centres to read our statement and ensure that our requirements are put in place. It is particularly important that centres make learners aware that data is shared with Skillsfirst Awards. Our policy statement on this and data requirements can be found in our centre handbook on our website www.skillsfirst.co.uk

2.2 Equality and accessibility

Equality and accessibility

Skillsfirst is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation and EU directives including the Equality Act 2010 (Amendment) Order 2012 and to ensure this occurs, has in place a policy on equality and accessibility which can be found on our website www.skillsfirst.co.uk and within our centre handbook.

Skillsfirst will ensure that centres use a equality and accessibility policy that works together with ours and that they maintain an effective appeals procedure which along with the equality and accessibility policy, will be monitored by the external verifier. We expect centres to tell learners how to find and use their own equality and accessibility and appeals procedures.

Access to assessment

Skillsfirst Awards is committed to guaranteeing all learners are treated fairly and equally and to ensure this occurs, has in place a policy on reasonable adjustments and special considerations. This policy states clearly what centres can and in some cases must, put in place to assist learners who may have particular requirements.

We expect centres to tell learners how to find and use their own reasonable adjustments and special considerations policy and will monitor implementation through the external verification process. This policy can be accessed at www.skillsfirst.co.uk and within our centre handbook. Further advice on this policy and its application can be obtained from our customer services team at customerservices@skillsfirst.co.uk

2.3 Enquiries and information sources

Skillsfirst aims to provide accurate information in a variety of formats and media. Recognised centres are encouraged to make enquiries to the customer services team, or seek clarification from our website. Learners wishing to enquire about qualifications, aspects of qualifications or quality assurance policies and procedures are encouraged, in the first instance, to seek information from the recognised centre or their tutor/assessor. Where a satisfactory answer is unavailable, learners are encouraged to seek clarification from our website, or from the Skillsfirst customer services team.

As a guide, the majority of frequently requested information is available on our website or on request via the electronic helpline listed below.

Website: www.skillsfirst.co.uk

email: customerservices@skillsfirst.co.uk

Tel: 0121 270 5100
Fax: 0121 747 4102

In writing to:

Customer Services
Skillsfirst Awards Limited
Suite 215
Fort Dunlop
Fort Parkway
Birmingham
B24 9FD

2.4 Complaints and appeals

Complaints

Skillsfirst Awards will endeavour at all times to satisfy our customer's needs and ensure a quality service. There may be times when our centres do not feel we have met these needs. Should they wish, centres may complain in writing to the Skillsfirst Awards customer services manager. We will attempt to resolve all complaints within the published timescales and will record and review all complaints as part of our ongoing customer service commitment.

Appeals

Skillsfirst Awards aims to ensure that at all times its decisions are fair, consistent and based on valid judgements. However, it is recognised that there may be occasions when a centre or a learner may wish to question a decision made. Skillsfirst Awards therefore has an appeals policy and process which clearly indicates the rights of the centre and the learner to appeal against a range of decisions taken by Skillsfirst.

The Skillsfirst Awards appeals policy and process can be accessed on our website www.skillsfirst.co.uk and within our centre handbook. Centres are required to have a documented policy and procedure which allows learners to question decisions made by the centre. The final stage of such a procedure may be to appeal to the Skillsfirst Awards external verifier. This policy would form part of the original centre recognition process and its implementation will be monitored by the external verifier.

2.5 Malpractice and maladministration

Skillsfirst Awards has a responsibility to ensure that malpractice and maladministration is addressed effectively and to publish procedures to centres for dealing with malpractice on the part of learners, centre staff and any others involved in providing the qualification. To meet this requirement, Skillsfirst Awards has a malpractice policy and process, the details of which can be accessed on our website www.skillsfirst.co.uk

3.0 The sector skills council for customer service

3.1 SkillsCfA

The Level 2 Diploma in Customer Service (QCF) is based on the units developed by SkillsCfA who are the sector skills council for customer service. Their contact details are:

SkillsCfA
6 Graphite Square
Vauxhall
London
SE11 5EE

Tel: 0207 091 9620
info@skillscfa.org

This handbook provides details from e-skills assessment strategy, which centres will need to apply in order to assess and quality assure the Level 2 Diploma in Customer Service (QCF) and includes the:

- requirements of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

The complete assessment strategy is available for view and to download from the e-skills website www.skillscfa.org

3.2 Requirements of those who assess performance, and moderate and verify assessments

Assessors

The primary responsibility of an assessor is to assess learners' performance in a range of tasks and to ensure the evidence for the competence of knowledge based skills submitted by the candidate meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in depth technical understanding related to the qualifications for which they are assessing learners. It will be the responsibility of the approved centre to select and appoint assessors.

Assessors should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess learners undertaking competence based units and qualifications. Assessors working towards an appropriate qualification must get their decisions countersigned by a suitably qualified assessor/verifier. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

- be "occupationally competent" or have the necessary and sufficient experience of the role for which they intend to undertake assessments, including the level and scope of individual candidate performance at work or in RWEs; and judgements about the quality of assessment and the assessment process.

Internal quality assurer (IQA/IV)

A primary responsibility of an IQA/IV is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQA/IV s therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA/IVs

Potential IQA/IVs should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence based assessments and learners. If an IQA/IV is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA1. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards.

- be "occupationally competent or have the necessary and sufficient experience of the role for which they intend to verify assessments. This experience will provide potential verifiers with detailed knowledge of the functions described by the occupational standards that comprise the qualification and will also allow them to make judgements about the quality of assessment and the assessment process.

3.3 Employer direct model

SkillsCfA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use this employer direct model:

An organisation must:
- have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**

- seek guidance and approval from an awarding organisation to demonstrate that they have:

  - appropriate processes in place to facilitate assessment, moderation or verification functions
  - carried out 100% mapping of the trainer, supervisor or managers assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

- agree the mapping process with the awarding organisation/body involved

- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Skillsfirst will:

- offer this model to employers only and

- supply information on the requirements for internal and external moderation/verification activities to assessment centres

3.4 Continuous professional development

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD.

Centres are expected to support their assessors and IVs 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.

Centres may have generic criteria and personnel specifications in addition to the above.

4.0 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

4.1 Evidence from workplace performance

- Evidence of occupational competence of all units at any level should be generated and collected through performance under workplace conditions. This includes competence units which have knowledge learning outcomes and assessment criteria.

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all learners. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Characteristics of assessment guidance

The learner may produce evidence from a range of examples which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can:

- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

Professional discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed.

Realistic working environment (RWE)

It is essential that organisations wishing to operate a 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:

- the RWE is managed as a real work situation;
- assessment must be carried out under realistic business pressures;
- all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations;
- learners must be expected to achieve a volume of work comparable to normal business practices;
- the range of services, products, tools, materials and equipment that the learners use must be up to date and available;
- account must be taken of any legislation or regulations in relation to the type of work that is being carried out;
- learners must be given workplace responsibilities to enable them to meet the requirements of the units;
- customer perceptions of the RWE is similar to that found in the work situation being represented;
- learners must show that their productivity reflects those found in the work situation being represented

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4.3 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

Simulation

- Simulation can be applied to all Level 1 units.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.
- Units which have been imported by Skills CFA into their apprenticeships or competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidate's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence. However, centres must comply with Skillsfirst guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

4.4 Recognition of prior learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

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- where observation or expert witness testimony is a unit assessment method requirement, this activity is undertaken after learner registration for the qualification

In considering the appropriateness of any single piece of **evidence**, the following should be considered:

- **Content** – the degree to which the content of any previous accredited learning meets the requirements of the national occupational standards against which it is being presented as evidence.

- **Performance and knowledge** – the degree to which the previous learning covered both performance and knowledge. Some learning will only have offered and tested the latter, in which case RPL will only recognise the meeting of knowledge requirements. Performance will require further assessment. Although unlikely, the reverse (performance tested but not knowledge) could be true in which case knowledge and understanding would need further assessment.

- **Relevance of context** – the degree to which the context of the learning gained and assessed, relates to the current context of learner' work roles. If the context was different, assessors will need to satisfy themselves of learners' ability to transfer the learning gained into their current setting.

- **Currency** – how recently the learning was gained. Learners would need to demonstrate current knowledge and understanding of areas such as legislation, policy and practice etc, which may have changes since the previous learning programmes were undertaken.

- **Authenticity** – how the ownership of the evidence is established to ensure it was generated by the learner.

5.0 Qualification information

5.1 What is the qualification and credit framework?

The qualification and credit framework (QCF) is a way of recognising achievement through the award of credit for units and qualifications. It will provide flexible routes to gaining full qualifications and enable qualifications to be achieved in smaller steps. Units within the framework will have a level (ranging from entry level to level 8) to indicate the level of difficulty. They will also have a credit value to indicate the size of the unit.

The QCF will:

- allow providers to design more flexible programmes, suited to the needs of a wider range of learners
- describe achievements (credits) to employers, providers and learners in a way that is easy to understand
- allow learners to accumulate credit, by recognising smaller steps of learning at their own pace
- allow learners to transfer credits into an electronic learner achievement record, which they will keep for life

5.2 QCF units

Each unit has a credit value based on the total number of hours of learning required to achieve it, (notional learning). Each 10 hours of learning equals 1 credit, for example, if a unit takes 30 hours of learning, it will receive a credit value of 3. The units vary in credit value. In addition all units have a level which may be different from the qualification in which they can be used.

5.3 QCF terminology

Whilst the evidence outcomes required from QCF and NVQ units are the same, the QCF units use different terminology to the NVQ units. The assessment criteria for NVQ units are listed under 'what you must do' and 'what you must know' whereas the QCF units are all listed under 'the learner can'.

5.4 Availability of qualifications

This handbook covers the Level 2 Diploma in Customer Service (QCF). To complete a qualification, the minimum credit value must be achieved and progressive qualifications at a higher level require more credit to be achieved. The number of units to achieve this is not fixed, as it is the total credit value that is required. Rules of combination apply to each qualification. Learners can accumulate credit which will allow them to claim award, certificate or diploma certification, as the qualification credit values are achieved.

5.5 Qualification aim and design

The aim of this qualification is to recognise learners' achievements within the customer service environment. It is also for learners whose job role requires them to deliver continually improving service to customers. These learners may be in roles that carry a customer service specific job title, or their primary responsibility is to deliver excellent service to customers.

This qualification can also be used by learners who may not regard customer service as their primary responsibility, but recognise that customer service competencies are essential to complement their technical skills.

This qualification also serves as a core component of the Level 2 Intermediate Apprenticeship in Customer Service.

6.0 Qualification structure

6.1 Number of credits required for this qualification

Qual no.	Level	Qualification title	Number of credits
CUSD2	2	Level 2 Diploma in Customer Service (QCF)	Minimum of 45

6.2 Rules of Combination

A minimum total of 45 credits must be achieved to gain the qualification as follows:

All 19 credits must be achieved from the mandatory Group M.
A minimum of 3 credits must be achieved from Group A
A minimum of 16 credits must be achieved from Group B
A maximum of 7 credits can be achieved from Group C

Minimum Guided Learning Hours (GLH) are 254
Maximum Guided Learning Hours (GLH) are 305

6.3 List of available units and their credit value

The list below gives the unit titles, their level and the credit value of each unit.

Group M - mandatory units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
A/506/1964	BUS38	2	Understand employer organisations	4
A/506/2130	CUS7	2	Deliver customer service	5
F/506/2131	CUS8	2	Understand customers	2
J/506/2132	CUS9	2	Principles of customer service	4
L/506/1788	ML1	2	Manage personal performance and development	4

Group A - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
D/506/2119	CUS5	2	Communicate verbally with customers	3
T/506/2126	CUS6	2	Communicate with customers in writing	3

Group B - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
H/506/2154	CUS10	2	Deal with incoming telephone calls from customers	3
K/506/2155	CUS11	2	Make telephone calls to customers	3
L/506/2133	CUS12	2	Promote additional products and/or services to customers	2
R/506/2134	CUS13	2	Process information about customers	3

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QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
Y/506/2135	CUS14	2	Exceed customer expectations	3
T/506/2143	CUS15	2	Deliver customer service whilst working on customer's premises	4
T/506/2157	CUS16	2	Carry out customer service handovers	3
A/506/2158	CUS17	2	Resolve customer service problems	5
F/506/2159	CUS18	2	Deliver customer service to challenging customers	3
Y/506/2149	CUS19	2	Develop customer relationships	3
T/506/2160	CUS20	2	Support customer service improvements	3
A/506/2161	CUS21	2	Support customers through real-time online customer service	3
H/506/2977	CUS22	2	Support customers using self-service equipment	3
J/506/2163	CUS23	2	Use social media to deliver customer service	3
K/506/2978	CUS24	2	Provide post-transaction customer service	5
R/506/2151	CUS31	3	Resolve customers' complaints	4
D/506/2170	CUS32	3	Gather, analyse and interpret customer feedback	5

Group C - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
L/506/1807	BUS13	2	Manage diary systems	2
H/506/1814	BUS19	2	Provide reception services	3
L/506/1869	BUS27	2	Contribute to the organisation of an event	3
M/506/1895	BUS35	2	Buddy a colleague to develop their skills	3
L/506/1905	BUS39	2	Employee rights and responsibilities	2
H/506/1912	BUS42	3	Negotiate in a business environment	4
L/503/0394	CC19	2	Carry out direct sales activities in a contact centre	5
K/503/0421	CC38	2	Deal with incidents through a contact centre	7
T/505/4673	HSPW2	2	Health and safety procedures in the workplace	2
F/502/4396	IT201	2	Bespoke Software 2	3
R/506/1789	ML2	2	Develop working relationships with colleagues	3

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J/506/1806	ML7	2	Principles of equality and diversity in the workplace	2
M/502/8587	SA207	2	Processing sales orders	2
R/502/8601	SA213	2	Meeting customers' after sales needs	3
M/502/8606	SAL214	2	Handling objections and closing sales	3

6.4 Learner entry requirements

Formal requirements

There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.

Age restrictions

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

6.5 Progression opportunities

On completion of the Level 2 Diploma in Customer Service (QCF), learners may progress into employment or onto the following Skillsfirst qualifications:

- Level 2 Diploma in Team Leading (QCF)
- Level 3 Diploma in Customer Service (QCF)
- Level 3 Diploma in Management (QCF)

or similar higher level qualifications.

7.0 The Units of Learning

7.1 Structure of the units

The units which make up these qualifications are written in a standard format and comprise of:

- Skillsfirst reference number
- unit title
- level and credit value
- unit aim
- learning outcomes
- guided learning hours
- endorsement of the unit
- information on assessment
- learning outcomes and assessment criteria

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7.2 Group M - mandatory units
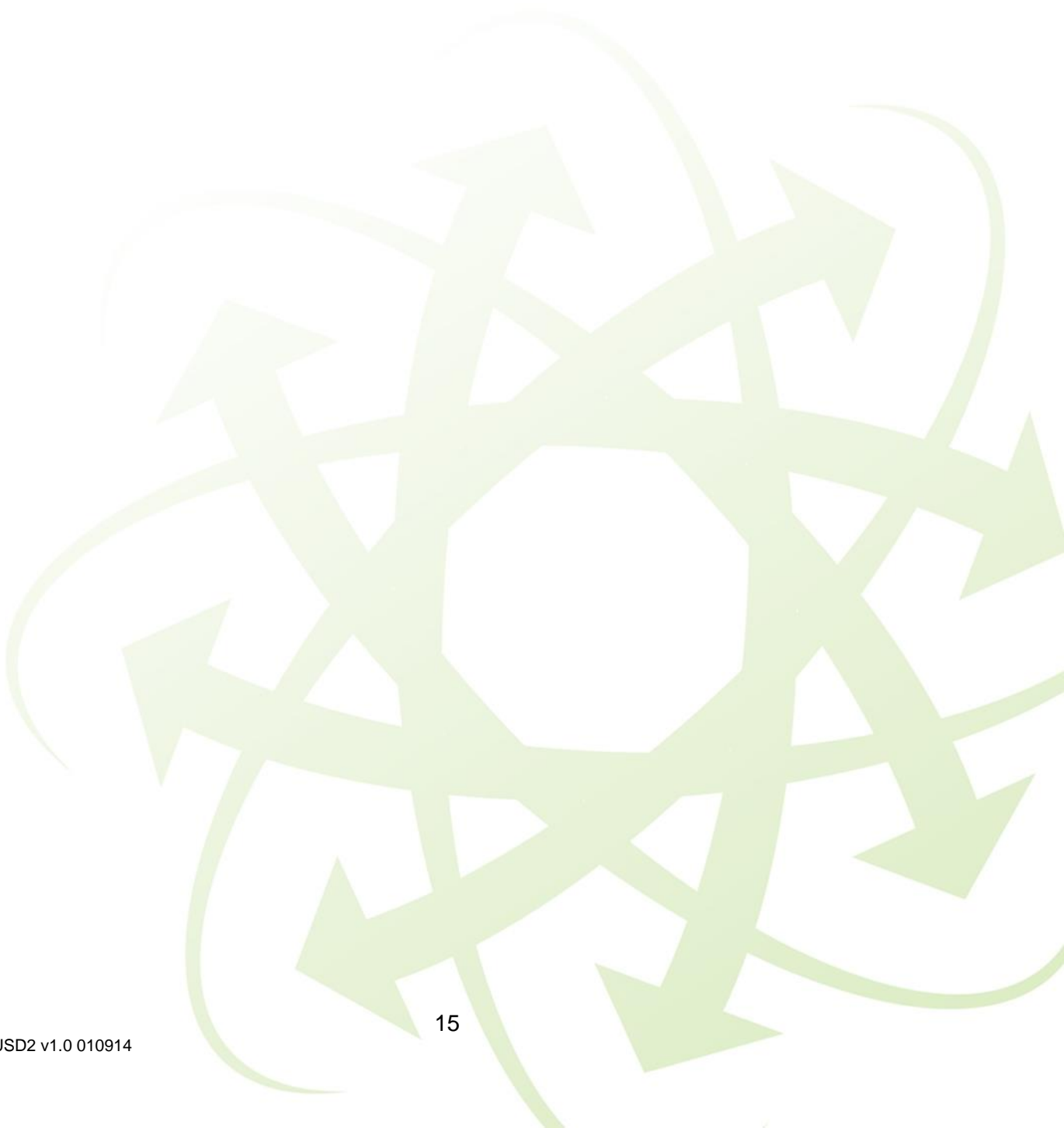
BUS38

Understand employer organisations
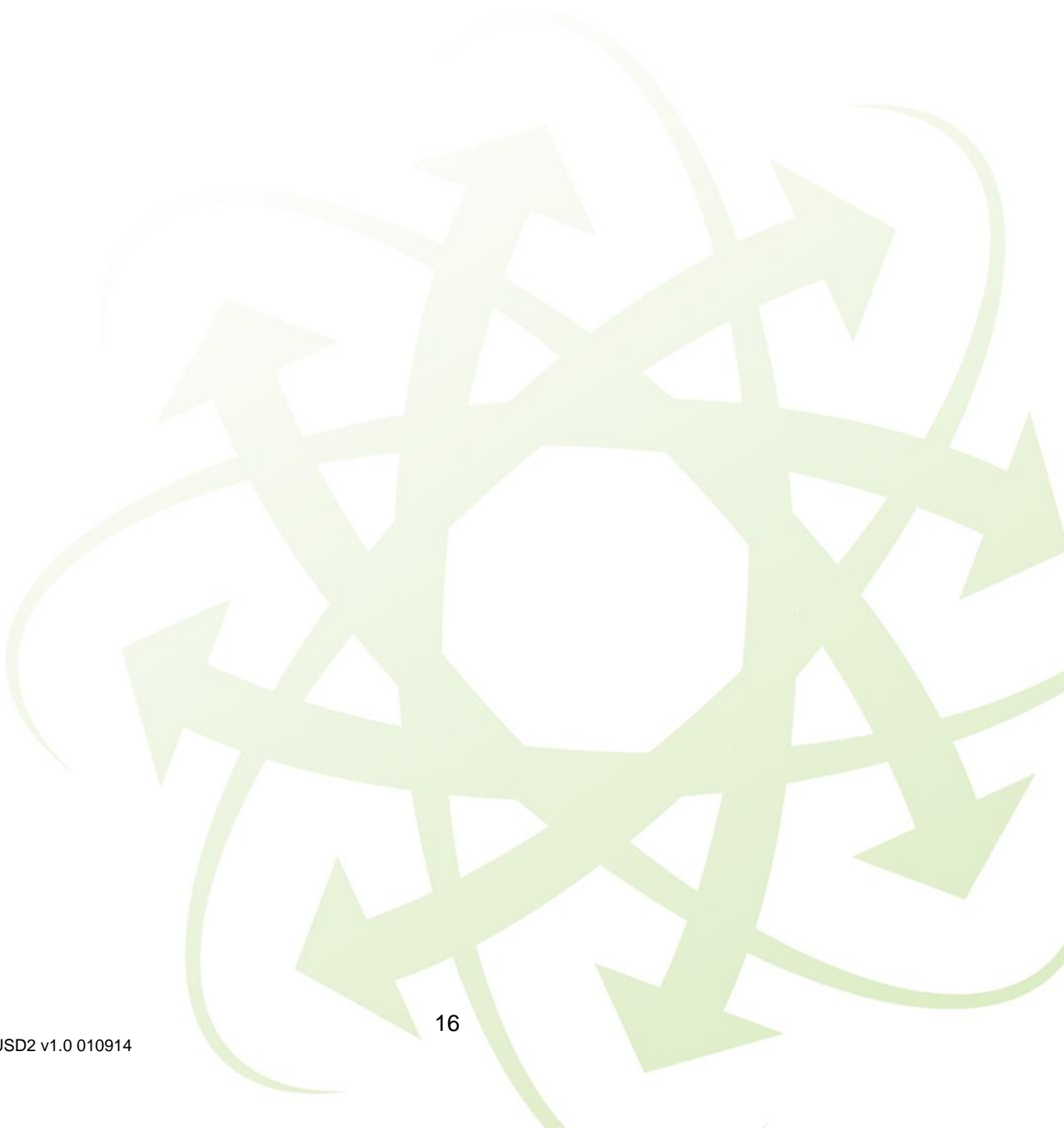
BUS38   Understand employer organisations

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of organisational structures and the organisational environment in which they operate.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand organisational structures
2.   Understand the organisational environment

Guided learning hours
It is recommended that **41** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Different models of analysis include SWOT (strengths, weaknesses, opportunities and threats) and PESTLE (political, economic, social, technological, legal and environment).

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS38 Understand employer organisations

Learning outcomes and assessment criteria

Outcome 1 Understand organisational structures

The learner can:
1. explain the differences between the private sector, public sector and voluntary sector
2. explain the functions of different organisational structures
3. describe the features of different types of legal structures for organisations

Outcome 2 Understand the organisational environment

The learner can:
1. describe the internal and external influences on organisations
2. explain the use of different models of analysis in understanding the organisational environment
3. explain why change in the business environment is important

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CUS7

Deliver customer service

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CUS7   Deliver customer service

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of customer service delivery and the relationship between customer service and a brand. It will also provide learners with an ability to prepare to deal with customers, to provide customer service and to support improvements to customer service delivery.

Learning outcomes
There are **five** outcomes to this unit. The learner will:

1.   Understand customer service delivery
2.   Understand the relationship between customer service and a brand
3.   Be able to prepare to deal with customers
4.   Be able to provide customer service
5.   Be able to support improvements to customer service delivery

Guided learning hours
It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Features are characteristics, attributes and qualities of a product or service

Benefits are advantages and uses of a service or product

Methods of measuring their own effectiveness may include, but are not limited to:
•   Customer feedback
•   Peer feedback
•   Reviewing performance against targets

Brand is a type of product /service provided by a particular company under a specific name

Customer service language could include phrases such as:
•   "My Pleasure"
•   "No Problem"
•   "Have A Good Day"
•   "Thank you for your custom"

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS7   Deliver customer service

Learning outcomes and assessment criteria

Outcome 1   Understand customer service delivery

The learner can:
1. explain the relationship between customers' needs and expectations and customer satisfaction
2. describe the features and benefits of an organisation's products and/or services
3. explain the importance of treating customers as individuals
4. explain the importance of balancing promises made to customers with the needs of an organisation
5. explain when and to whom to escalate problems
6. describe methods of measuring their own effectiveness in the delivery of customer service

Outcome 2   Understand the relationship between customer service and a brand

The learner can:
1. explain the importance of a brand to an organisation
2. explain how a brand affects an organisation's customer service offer
3. explain the importance of using customer service language that supports a brand promise
4. identify their own role in ensuring that a brand promise is delivered

Outcome 3   Be able to prepare to deal with customers

The learner can:
1. keep up to date with an organisation's products and/or services
2. prepare resources that are necessary to deal with customers before starting work

Outcome 4   Be able to provide customer service

The learner can:
1. maintain organisational standards of presentation and behaviour when providing customer service
2. adapt their own behaviour to meet customers' needs or expectations
3. respond to customers' requests in line with organisational guidelines
4. inform customers of the progress of their requests
5. confirm that customers' expectations have been met in line with the service offer
6. adhere to organisational policies and procedures, legal and ethical requirements when providing customer service

Outcome 5   Be able to support improvements to customer service delivery

The learner can:
1. identify ways that customer service could be improved for an organisation and individuals
2. share information and ideas with colleagues and/or service partners to support the improvement of service delivery

CUS8

Understand customers

CUS8   Understand customers

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of different types of customers and the value of customers and their loyalty.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand different types of customers
2.   Understand the value of customers and their loyalty

Guided learning hours
It is recommended that **17** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Cultural factors can include, but are not limited to:
•   Stories portrayed in the media
•   Industry standard setting
•   Demographics such as age, gender, socio-economic status
•   Religious, moral views

Service offer is defined as the extent and limits of the customer service that an organisation is offering

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS8   Understand customers
Learning outcomes and assessment criteria

Outcome 1   Understand different types of customers

The learner can:
1   explain the distinctions between internal and external customers
2   explain how cultural factors can affect customers' expectations
3   describe the characteristics of challenging customers
4   explain how to identify dissatisfied customers

Outcome 2   Understand the value of customers and their loyalty

The learner can:
1   explain how the achievement of the customer service offer contributes to enhancing customer loyalty
2   explain the relationship between customer satisfaction and organisational performance
3   explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services
4   explain the potential consequences of customers' dissatisfaction
5   describe different methods of attracting customers and retaining their loyalty

CUS9

Principles of customer service

CUS9   Principles of customer service

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of customer service and the management of customer service information. It will also provide learners with an understanding of how legal and ethical requirements relate to customer service and how to deliver effective customer service

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand customer service
2.   Understand how legal and ethical requirements relate to customer service
3.   Understand how to deliver effective customer service
4.   Understand the management of customer service information

Guided learning hours
It is recommended that **34** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Competitors are organisations that offer products or services that are similar to those offered by the organisation you are employed by.

Follow-up service includes servicing and guarantees

Sales and consumer legislation and regulations may include, but are not limited to:
• Consumer Credit Act
• Sale of Goods Act
• Supply of Goods & Services Act
• Distance Selling Regulations
• Treating Customer Fairly (TCF)

Health, safety and environmental legislation may include, but is not limited to:
• Environment and Safety Information Act
• Health and Safety at Work Act

Ethical considerations may include, but are not limited to:
• Corporate Social Responsibility (CSR)
• 'Fairtrade'
• Globalisation
• Sustainability
• Social Enterprise
• Work-life balance

Equality legislation may include, but is not limited to Equality Act 2010

Customer expectations are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service.

Techniques may include, verbal and non-verbal methods of communication

Systems may include, but are not limited to:
- Records
- Archives
- Customer Contact Systems

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS9 Principles of customer service

Learning outcomes and assessment criteria

Outcome 1 Understand customer service

The learner can:
1. explain the purpose and scope of customer service
2. define the term "service offer"
3. explain the value of a "service offer" to an organisation
4. explain the importance of delivering consistently high quality customer service
5. explain the importance of keeping up to date with knowledge of competitors' activities
6. explain barriers to providing effective customer service
7. describe the features of effective follow-up service

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

The learner can:
1. describe how sales and consumer-related legislation and regulations affect the delivery of customer service
2. describe how health, safety and environmental legislation affects customer service delivery
3. explain how ethical considerations affect customer service
4. explain how equality legislation affects customer service
5. describe how legislation affects the use and storage of customer information

Outcome 3 Understand how to deliver effective customer service

The learner can:
1. explain the difference between customers' wants, needs and their expectations
2. explain how to identify customers' needs and expectations
3. explain the importance of managing customers' expectations
4. explain how to behave in a way that meets customers' expectations
5. describe techniques that can be used to put customers at ease and gain their trust
6. explain the importance of following up actions and keeping promises when delivering customer service

Outcome 4 Understand the management of customer service information

The learner can:
1. explain how customer service information can be used
2. explain the importance of systems to manage customer service information
3. explain the uses of systems to manage customer service information
4. identify the features of an effective customer complaints process
5. describe the uses of a customer complaints process

ML1

Manage personal performance and development

ML1   Manage personal performance and development

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with the ability to manage their personal performance, as well as their own time and workload. It also provides learners with the ability to identify their own development needs and fulfil a personal development plan.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Be able to manage personal performance
2.   Be able to manage their own time and workload
3.   Be able to identify their own development needs
4.   Be able to fulfil a personal development plan

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML1   Manage personal performance and development

Learning outcomes and assessment criteria

Outcome 1   Be able to manage personal performance

The learner can:
1   agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
2   agree criteria for measuring progress and achievement with line manager
3   complete tasks to agreed timescales and quality standards
4   report problems beyond their own level of competence and authority to the appropriate person
5   take action needed to resolve any problems with personal performance

Outcome 2   Be able to manage their own time and workload

The learner can:
1   plan and manage workloads and priorities using time management tools and techniques
2   take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
3   explain the benefits of achieving an acceptable "work-life balance"

Outcome 3   Be able to identify their own development needs

The learner can:
1   identify organisational policies relating to personal development
2   explain the need to maintain a positive attitude to feedback on performance
3   explain the potential business benefits of personal development
4   identify their own preferred learning style(s)
5   identify their own development needs from analyses of the role, personal and team objectives
6   use feedback from others to identify their own development needs
7   agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

Outcome 4   Be able to fulfil a personal development plan

The learner can:
1   agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
2   make use of formal development opportunities that are consistent with business needs
3   use informal learning opportunities that contribute to the achievement of personal development objectives
4   review progress against agreed objectives and amend plans accordingly
5   share lessons learned with others using agreed communication methods

7.3 Group A - optional units

CUS5

Communicate verbally with customers

CUS5   Communicate verbally with customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to communicate verbally with customers and to use that understanding to use customer service language to communicate with customers.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to communicate verbally with customers
2.   Be able to use customer service language to communicate with customers

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Customer service language" could include phrases such as:
- "My Pleasure"
- "No Problem"
- "Have A Good Day"
- "Thank you for your custom"

Questioning techniques may include, but may not be limited to:
- Open,
- Closed
- Verbal
- Written
- Probing
- Clarification

A **verbal signal** is a phrase or statement said by the customer.
A **non-verbal signal** is the body language of the customer.

Listening actively refers to:
- Asking questions to check information
- Repeating information to show understanding
- Avoiding distractions, assumptions and interruptions
- Using body language/facial expressions as if the customer is present

Legal and ethical requirements will be specific to the sector but could include:
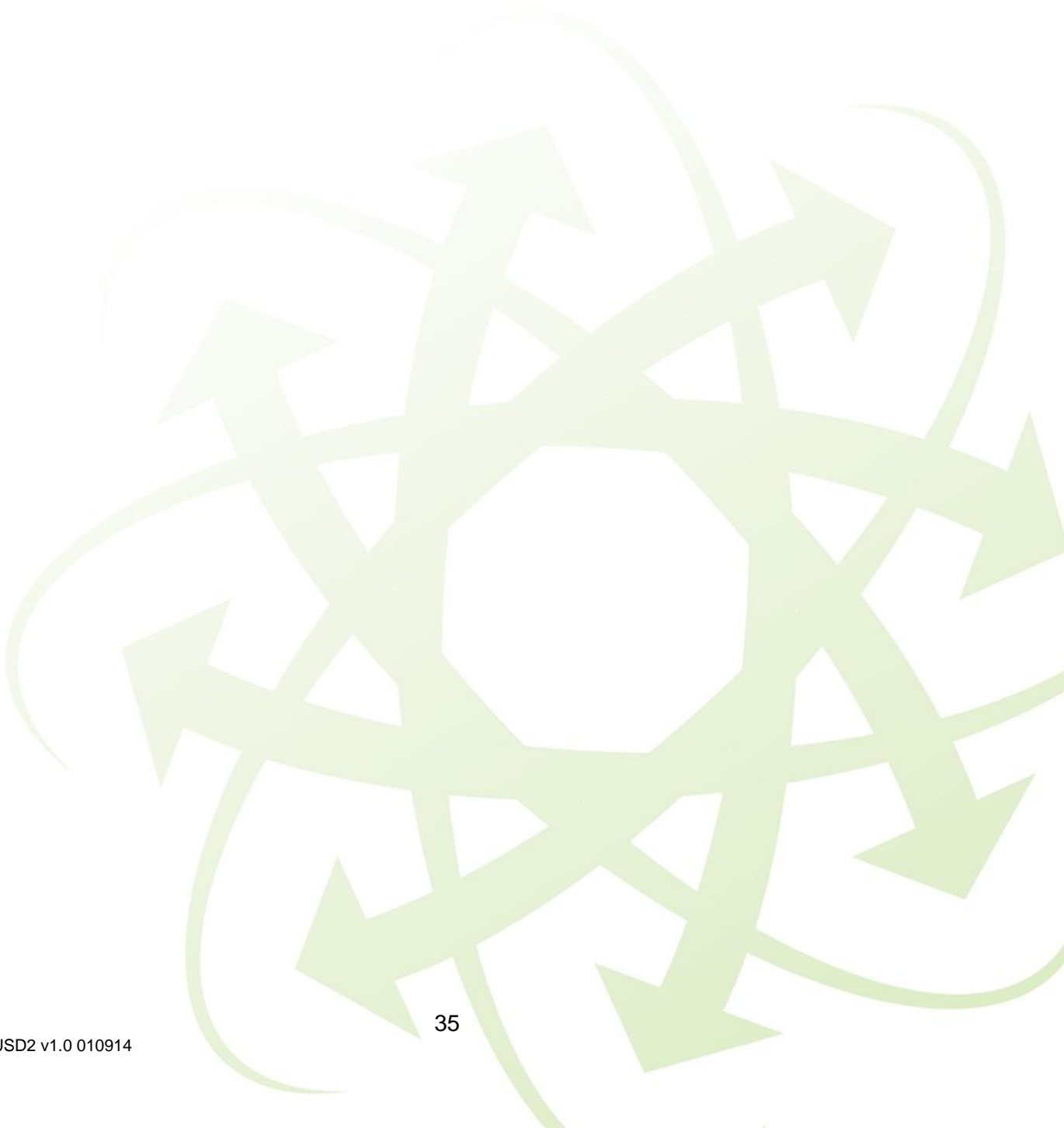- The Data Protection Act
- The Equality Act

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

CUS5   Communicate verbally with customers
Learning outcomes and assessment criteria

Outcome 1   Understand how to communicate verbally with customers

The learner can:
1   explain the importance of effective communication in customer service
2   explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
3   explain why "customer service language" is used
4   describe different questioning techniques that can be used when communicating with customers
5   describe verbal and non-verbal signals that show how a customer may be feeling
6   describe the types of information needed when communicating verbally with customers

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

The learner can:
1   identify customers' wants and priorities
2   listen "actively" to what customers are saying
3   communicate clearly, concisely and professionally with customers
4   use a tone of voice and expression that reinforces messages when communicating with customers
5   use language that reinforces empathy with customers
6   adapt their response in accordance with customers' changing behaviour
7   provide information and advice that meets customers' needs
8   maintain organisational standards of behaviour and communication when interacting with customers
9   check that customers have understood what has been communicated
10 adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

CUS6

Communicate with customers in writing
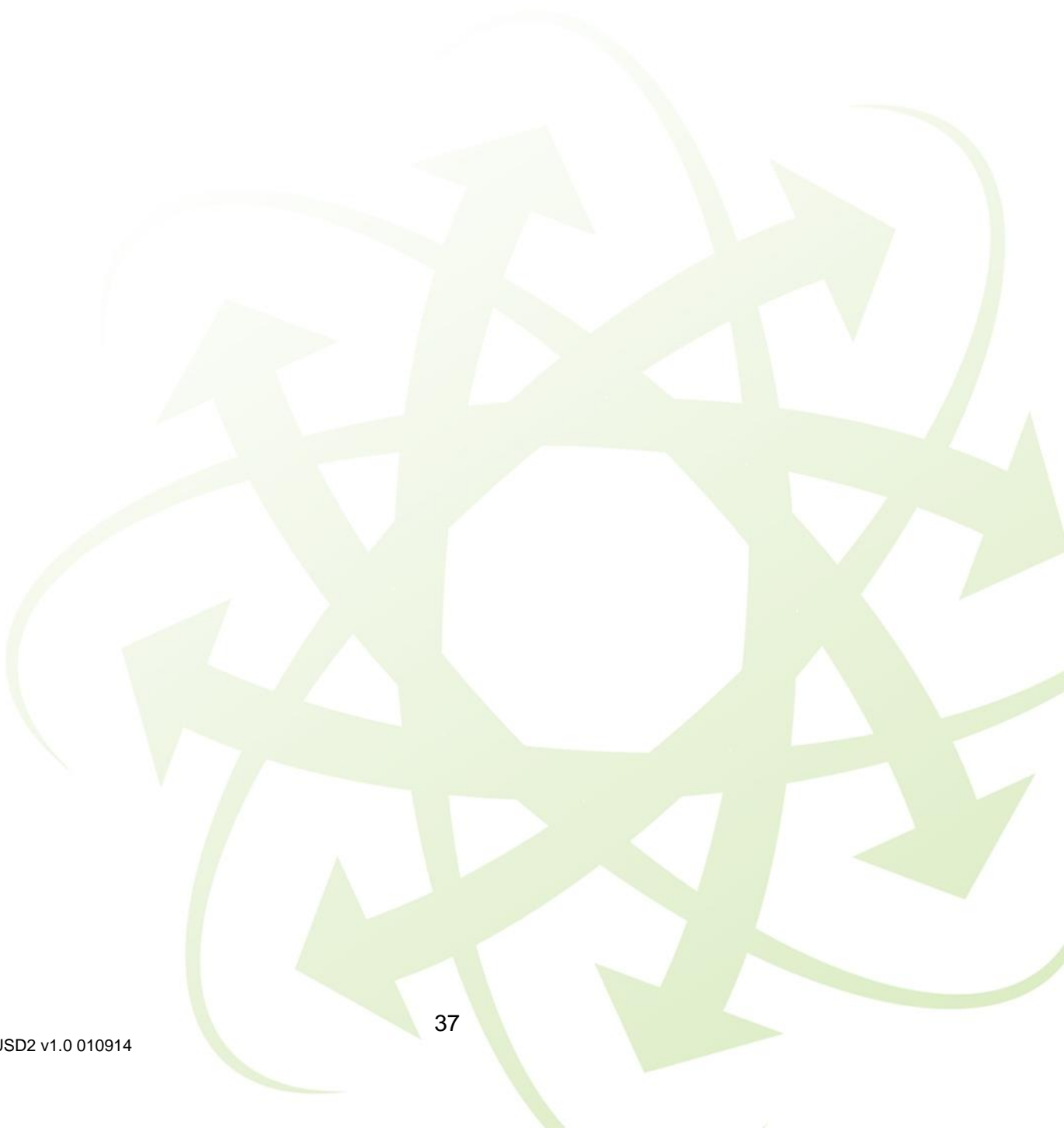
CUS6   Communicate with customers in writing

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to communicate with customers in writing. It will also provide learners with an ability to plan written communications to customers and then communicate with customers in writing.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to communicate with customers in writing
2.   Be able to plan written communications to customers
3.   Be able to communicate with customers in writing

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

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

Implications - including those of a legal nature

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS6   Communicate with customers in writing

Learning outcomes and assessment criteria

Outcome 1   Understand how to communicate with customers in writing

The learner can:
1. explain why it is necessary to use different forms of written communication for different purposes
2. describe practices for producing different forms of written communications
3. describe the potential benefits and limitations associated with communicating with customers in writing
4. explain the implications of confidentiality and data protection in communicating with customers in writing

Outcome 2   Be able to plan written communications to customers

The learner can:
1. identify the objective(s) of the communication
2. gather the information needed to draft the communication
3. select the form of written communication that is most likely to lead to customer satisfaction within the service offer

Outcome 3   Be able to communicate with customers in writing

The learner can:
1. produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone
2. use language that is clear and concise, adapting it to meet identified customer needs
3. record decisions and actions taken and the reasons for them
4. adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing
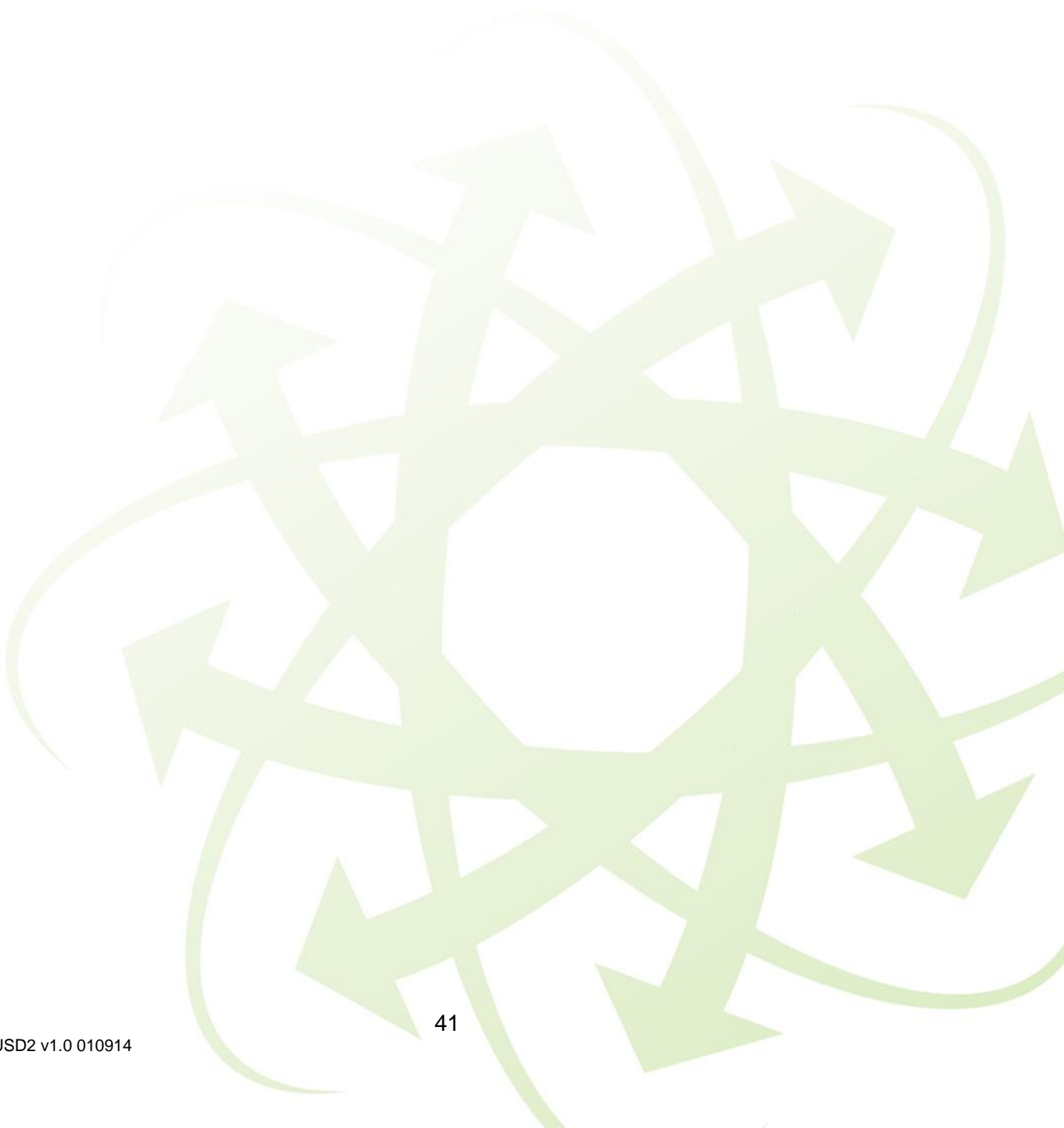
7.4 Group B - optional units

CUS10

Deal with incoming telephone calls from customers

CUS10　　Deal with incoming telephone calls from customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to deal with incoming customer calls. It will also to provide learners with an ability to establish the purpose of incoming customer calls and to deal with customer questions and requests.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.　　Understand how to deal with incoming customer calls
2.　　Be able to establish the purpose of incoming customer calls
3.　　Be able to deal with customer questions and requests

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Identity checking processes could include but not be exclusive to:
• 　Third party verification (TPV)
• 　Passwords
• 　Passport/bank account numbers

Questioning techniques may include, but is not exclusive to:
• 　Open
• 　Closed
• 　Verbal
• 　Written
• 　Probing
• 　Clarification

Listening actively refers to:
• 　Asking questions to check information
• 　Repeating information to show understanding
• 　Avoiding distractions, assumptions and interruptions
• 　Using body language/facial expressions as if the customer is present

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS10   Deal with incoming telephone calls from customers

Learning outcomes and assessment criteria

Outcome 1   Understand how to deal with incoming customer calls

The learner can:
1   explain why an organisation should have guidance on dealing with telephone calls
2   explain why an organisation should have an identity checking process
3   explain the importance of keeping customer information up to date
4   explain the importance of keeping customers informed of the progress of their call
5   describe how body language and facial expressions can be detected over the telephone
6   describe different questioning techniques used when dealing with incoming calls
7   explain how to handle abusive calls

Outcome 2   Be able to establish the purpose of incoming customer calls

The learner can:
1   verify the identity of callers in line with organisational guidelines
2   speak clearly, concisely and politely using speech and tone to create a rapport
3   adapt their own communication style to meet customers' needs
4   listen actively to what customers are saying to collect as much information as possible
5   use questioning techniques that are appropriate to the conversation
6   record information in line with organisational guidelines

Outcome 3   Be able to deal with customer questions and requests

The learner can:
1   respond in a way that best meets customer and organisational requirements
2   give clear and concise information that meets customers' needs
3   manage the length of the conversation
4   confirm that the customer is satisfied with the outcomes of the conversation
5   complete agreed post-call follow up actions

CUS11

Make telephone calls to customers
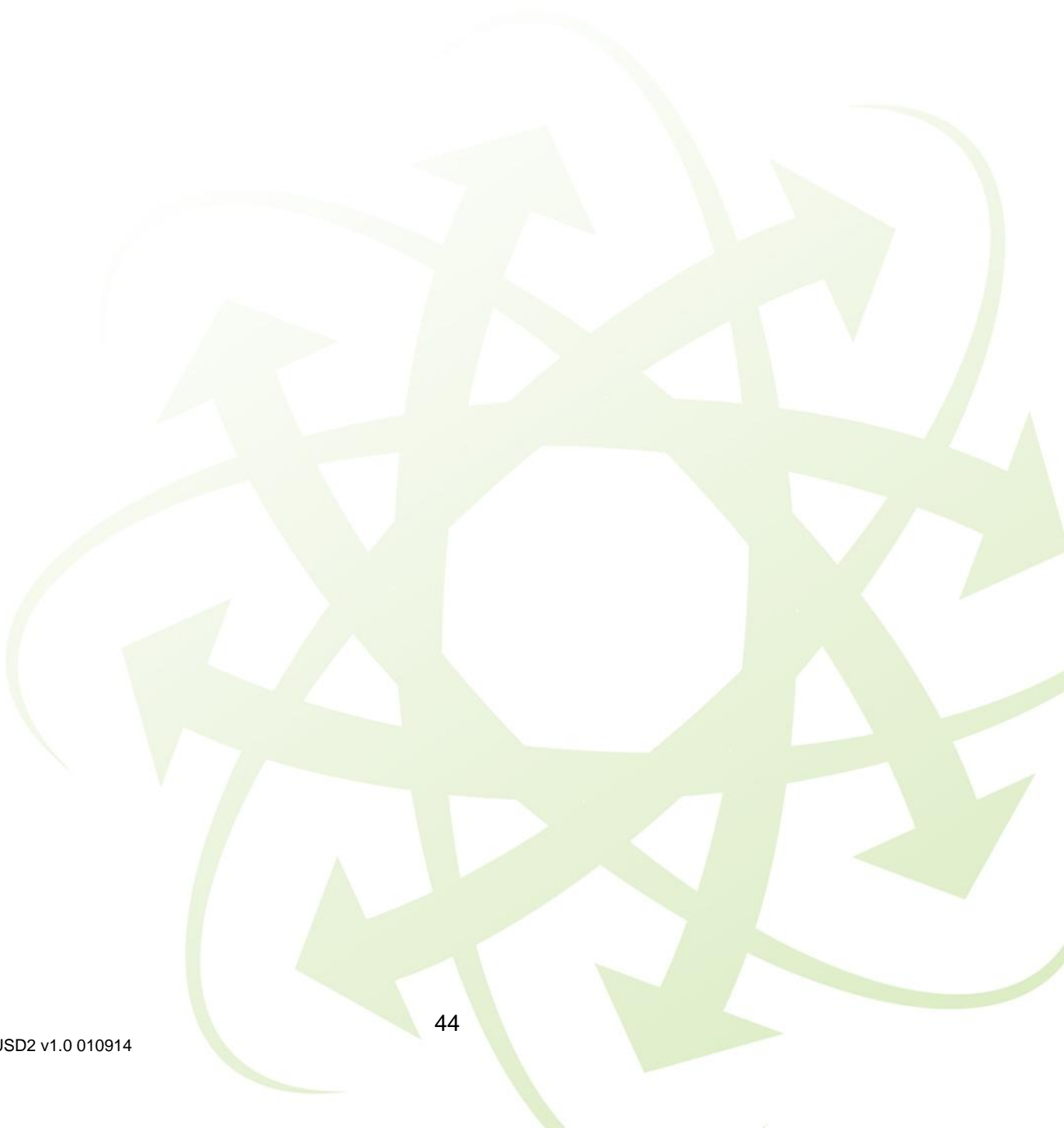
CUS11   Make telephone calls to customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to make telephone calls to customers. It will also provide learners with an ability to plan and make telephone calls to customers

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to make telephone calls to customers
2.   Be able to plan telephone calls to customers
3.   Be able to make telephone calls to customers

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Questioning techniques may include, but is not exclusive to:
- Open
- Closed
- Verbal
- Written
- Probing
- Clarification

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS11   Make telephone calls to customers

Learning outcomes and assessment criteria

Outcome 1   Understand how to make telephone calls to customers

The learner can:
1   explain the legislation and regulations relating to the use of customer information when planning to make calls
2   explain the importance of keeping customer information up to date
3   explain the reasons for organisational guidance on dealing with telephone calls
4   explain the reasons for organisational identity checking processes
5   explain how body language and facial expressions can be detected over the telephone
6   describe different questioning techniques when dealing with customers
7   explain organisational guidelines for what can and cannot be said or promised
8   explain how to handle abusive calls from customers

Outcome 2   Be able to plan telephone calls to customers

The learner can:
1   identify the objective(s) of calls
2   prepare the information needed to make calls
3   plan the structure of calls
4   identify customers' likely responses and how they can be dealt with

Outcome 3   Be able to make telephone calls to customers

The learner can:
1   use telecommunications equipment in accordance with organisational standards
2   confirm the identity of customers in line with organisational guidelines
3   make the customer aware of the purpose of the call as early as possible
4   speak clearly, concisely and politely, using speech and tone to create rapport
5   adapt their own communication style to meet customers' needs
6   listen actively to what customers are saying to collect as much information as possible
7   give clear and concise information that meets customers' needs
8   record information in line with organisational guidelines
9   complete agreed follow up actions after closing the telephone call

CUS12

Promote additional products and/or services to customers
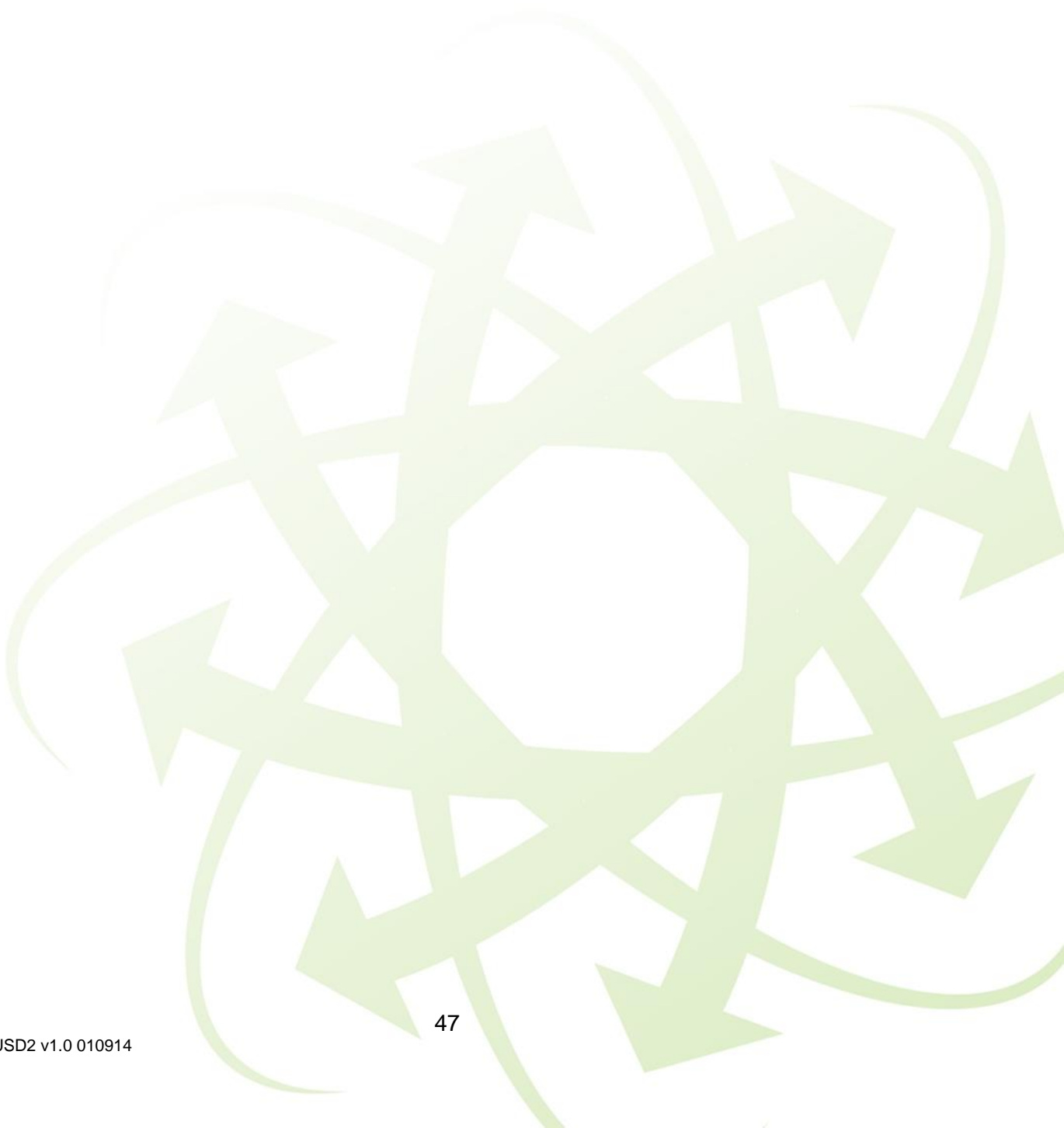
CUS12   Promote additional products and/or services to customers

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the promotion of additional products and/or services to customers and then to apply this understanding to promote additional products and/or services to customers.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1. Understand the promotion of additional products and/or services to customers
2. Be able to promote additional products and/or services to customers

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques may include but are not exclusive to –
• Verbal communication
• Written communication
• Product placement

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS12 Promote additional products and/or services to customers
Learning outcomes and assessment criteria

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

The learner can:
1 describe organisational policies and procedures on the promotion of additional products and/or services
2 explain the importance of keeping product/service knowledge up to date
3 explain how to match products and/or services to customer needs
4 describe techniques to promote additional products and/or services

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

The learner can:
1 identify opportunities to promote additional products and/or services that are likely to improve the customer experience
2 promote the benefits of additional products and/or services that are likely to be of interest to customers
3 provide information to customers that will help them to decide whether to select additional products and/or services
4 adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

CUS13

Process information about customers

CUS13   Process information about customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to process customer information and then apply this understanding to process customer information.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to process customer information
2.   Be able to process customer information

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

The description should be in relation to the **customer information systems** in use at the learner's place of employment.
The explanation should specifically identify appropriate **legislation and regulatory requirements.**

The learner should be able to explain their own **responsibilities and level of authority** and have an understanding of when and what to refer to others.

It is expected that the learner will be able to give examples of **sources of information** and make comparisons about their respective **reliability.**

Where possible, adherence to **organisational standards, policies and procedures** should be confirmed by a line manager or experienced colleague.

The learner should be able to differentiate between **authorised** and unauthorised **people.** Timely manner, in line with organisational procedures

Where an organisation adopts a standardised **format**, over which the learner has no control, this AC can be met by 'what if' scenarios.

Learners should also have an understanding of *which* **legal requirements** affect their activities.

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS13   Process information about customers

Learning outcomes and assessment criteria

Outcome 1   Understand how to process customer information

The learner can:
1. describe the functions of customer information systems
2. explain the way in which legislation and regulatory requirements affect the processing of customer information
3. explain different responsibilities and levels of authority for processing customer service information
4. explain the reliability of sources of customer information
5. explain the validity of customer information

Outcome 2   Be able to process customer information

The learner can:
1. record information about customers in line with organisational standards and procedures
2. keep customer information up to date
3. respond to requests for customer information from authorised people in a timely manner
4. retrieve customer information that meets the requirements of the request
5. supply customer information in a format appropriate for the recipient
6. adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

CUS14

Exceed customer expectations

CUS14   Exceed customer expectations

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to exceed customer expectations and apply this understanding to exceed customer expectations.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to exceed customer expectations
2.   Be able to exceed customer expectations

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

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

Legislation could include;
- Sale of goods Act 1979 (as amended)
- Age restrictive legislation covering for example the sale of:
     - Tobacco - Children and Young Persons (Protection from Tobacco) Act 1991 and Children and Young Person (Sale of Tobacco) Order 2007
     - Alcohol products - Licensing Act 2003
     - Spray paint - Anti Social Behaviour Act 2003
     - Knives - Criminal Justice Act 1988 etc
- Equality Act 2010
- H&S at Work Act 1974

Organisational policies – will be specific to the organisation but could include:
- Time in which goods can be returned (returns policy)
- Gift receipts
- Condition in which goods can be returned
- Validity of gift vouchers - expiry date
- Availability of the service offer
- Restrictions on the service offer, e.g., one per household, per customer
- H&S at work implications of any offer, e.g., working hours

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

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

Offers to customers could include:
- Providing promotional vouchers
- Offering additional service within organisational guidelines

- Offering additional services that have been advertised
- Making verbal offers as appropriate, e.g., offering something which is approved by the organisation but which the customer thinks has come from the individual

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

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CUS14   Exceed customer expectations

Learning outcomes and assessment criteria

Outcome 1   Understand how to exceed customer expectations

The learner can:
1. explain how customers form expectations of the service they will receive
2. explain legislation, organisational policies and procedures that can limit or vary the service offer
3. explain the types of actions that customers are likely to perceive as adding value
4. explain how to recognise when actions taken to offer added value could be built into the service offer

Outcome 2   Be able to exceed customer expectations

The learner can:
1. identify differences between customers' expectations and needs and the service offer
2. explain the service offer clearly and concisely to customers
3. identify options that offer added value without affecting other customers adversely
4. make offers to customers within their own authority levels
5. take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
6. record agreements made and actions taken

CUS15

Deliver customer service whilst working on customers' premises
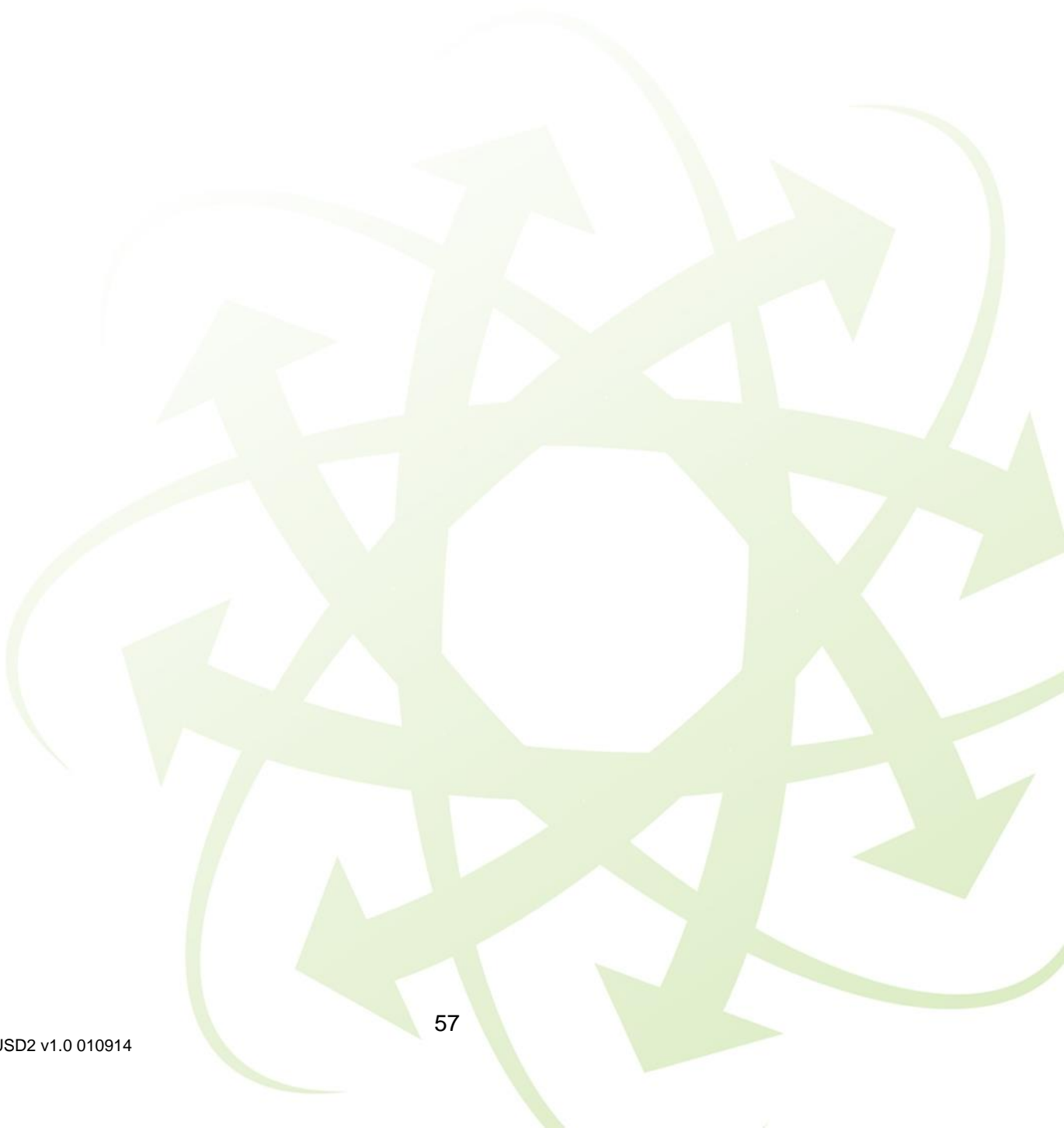
CUS15   Deliver customer service whilst working on customers' premises

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of how to deliver customer service whilst working on customers' premises and to apply this understanding to deliver customer service whilst working on customers' premises.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to deliver customer service whilst working on customers' premises
2.   Be able to deliver customer service whilst working on customers' premises

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Risks are situations or hazards that could course harm, danger or exposure to danger
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS15 Deliver customer service whilst working on customers' premises

Learning outcomes and assessment criteria

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

The learner can:
1 describe the preparations that need to be made prior to a visit
2 explain the importance of being positive about the product and/or service
3 explain organisational standards of presentation, behaviour and communication
4 explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
5 explain how to identify possible risks relating to the work to be carried out
6 explain the way in which legislation affects the work to be carried out

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

The learner can:
1 identify themselves to customers
2 take action to ensure that customers know when, why and for how long work will be carried out on their premises
3 confirm with customers the nature of work to be carried out on their premises
4 keep customers informed of progress, delays, variations to work to be carried out and follow up needed
5 treat customers, their premises and property with consideration
6 confirm that the customer is satisfied with the outcome
7 maintain their own personal safety and security and that of customers whilst on customers' premises

CUS16

Carry out customer service handovers

CUS16   Carry out customer service handovers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the customer service handover process. It will also provide learners with an ability to plan and carry out customer service handovers.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1. Understand the customer service handover process
2. Be able to plan customer service handovers
3. Be able to carry out customer service handovers

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Customer service handover is when one member of staff presents the needs of the customer to another member of staff. This could be due to a range of factors, including:
- Shift change
- Escalation

Customer service issues may include, but are not exclusive to:
- Complaints
- Compliments
- Linguistic or cultural barriers

Further actions could include but are not exclusive to:
- Identifying why the action has not been completed
- Identifying implications to customer
- Escalating to line manager or appropriate colleague

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS16   Carry out customer service handovers

Learning outcomes and assessment criteria

Outcome 1   Understand the customer service handover process

The learner can:
1   explain an organisation's customer service handover procedures
2   explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
3   explain why, when and how to set reminders to follow up on actions handed over to others
4   explain levels of their own responsibility in the customer service handover process

Outcome 2   Be able to plan customer service handovers

The learner can:
1   identify the steps in the customer service delivery process that rely on exchanges of information among team members
2   agree with colleagues when to pass customer service issues from one person to another
3   agree methods of information exchange

Outcome 3   Be able to carry out customer service handovers

The learner can:
1   explain to customers to whom and why a handover is being made
2   exchange information with colleagues in line with organisational procedures
3   check that actions required by others following handovers have been completed
4   identify further actions when the activities required by others have not been completed
5   share feedback with colleagues to make improvements to handover processes

CUS17

Resolve customer service problems

CUS17   Resolve customer service problems

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of the resolution of customer service problems. It will also provide learners with an ability to resolve customer service problems and to manage unresolved customer service problems.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the resolution of customer service problems
2.   Be able to resolve customer service problems
3.   Be able to manage unresolved customer service problems

Guided learning hours
It is recommended that **22** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

In AC 1.2 **techniques** include, types of questioning used, communicating with both customers and colleagues, active listening

In AC 1.3 **techniques** may relate to learners own communication style, body language, active listening or referral and involvement of others

Others may include colleagues, supervisors, managers

Other sources of help may be internal or external to an organisation i.e. managers or the Citizens Advice Bureau

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS17   Resolve customer service problems

Learning outcomes and assessment criteria

Outcome 1   Understand the resolution of customer service problems

The learner can:
1. describe an organisation's customer service and complaints procedures
2. describe techniques to identify customer service problems and their causes
3. describe techniques to deal with situations where customers become agitated or angry
4. explain the limits of their own authority for resolving customers' problems and making promises
5. explain the purpose of encouraging customers to provide feedback
6. describe methods used to encourage customers to provide feedback

Outcome 2   Be able to resolve customer service problems

The learner can:
1. identify the nature and cause of customer service problems
2. identify workable options for resolving problems within organisational guidelines
3. use the most appropriate method of communication for dealing with customers
4. agree with customers the option that best meets their needs and those of the organisation
5. keep customers informed of progress
6. fulfil promises made to customers during the resolution process
7. share customer feedback with others to improve the resolution of customer service problems
8. adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems

Outcome 3   Be able to manage unresolved customer service problems

The learner can:
1. explain to customers the reasons why problems cannot be resolved
2. refer customers to other sources of help if their problems cannot be resolved

CUS18

Deliver customer service to challenging customers

CUS18   Deliver customer service to challenging customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the delivery of customer service to challenging customers and then to apply this understanding to deal with challenging customers.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the delivery of customer service to challenging customers
2.   Be able to deal with challenging customers

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Challenging customers may have:
•   Problems/ questions
•   Additional needs / requirements
•   Poor communication skills and language barriers

or be:

•   Angry
•   Unreasonable
•   Confused

Behaviours may include but are not limited to:
•   Aggression
•   Frustration
•   Irritation
•   Confrontation

Techniques may include but are not limited to:
•   Active listening
•   Asking questions
•   Showing empathy
•   Using positive body language
•   Taking action

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

CUSD2 v1.0 010914

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

CUS18   Deliver customer service to challenging customers

Learning outcomes and assessment criteria

Outcome 1   Understand the delivery of customer service to challenging customers

The learner can:
1. describe different types of challenging customers in the customer service environment
2. explain an organisation's procedures and standards of behaviour for dealing with challenging customers
3. explain behaviours that make it challenging to deal with customers
4. explain the difference between assertive and aggressive behaviour
5. describe techniques to deal with customers' challenging behaviour
6. explain their own levels of authority for agreeing actions outside the service offer
7. explain why it is important that colleagues are informed when challenging customers re-open or escalate matters

Outcome 2   Be able to deal with challenging customers

The learner can:
1. identify the signs that indicate that a customer is challenging
2. express understanding of customers' point of view without admitting liability
3. explain to customers the limits of the service they can offer
4. explain to customers the reasons for an organisation's position and policy
5. agree a way forward that balances customer satisfaction and organisational needs
6. obtain help from colleagues when options for action are beyond their level of authority
7. adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

CUS19

Develop customer relationships

CUS19   Develop customer relationships

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to develop customer relationships and then apply this understanding to develop relationships with customers.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to develop customer relationships
2.   Be able to develop relationships with customers

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Customer expectations are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service.

Alternative service offers may include, but not be limited to:
•   Product replacement or upgrade
•   Refund
•   Compensation
•   Additional support
•   Extended warranties

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

Others may include colleagues, supervisors, managers

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS19   Develop customer relationships

Learning outcomes and assessment criteria

Outcome 1   Understand how to develop customer relationships

The learner can:
1   describe the importance of developing relationships with customers
2   explain the value of customer loyalty and retention
3   explain how customers' expectations may change over time
4   explain the use of customer feedback as a means of developing customer relationships
5   explain the limits of their own authority to make alternative service offers to customers
6   describe the use of Customer Relationship Management systems and processes to meet customers' expectations
7   explain the importance of regular communication in the development of both internal and external customer relationships

Outcome 2   Be able to develop relationships with customers

The learner can:
1   give help and information that meets or exceeds customers' expectations
2   identify new ways of helping customers based on their feedback
3   share feedback from customers with others
4   identify added value that the organisation could offer customers
5   bring to customers' attention products or services that may interest them

CUS20

Support customer service improvements

CUS20   Support customer service improvements

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to support customer service improvements. It will also provide learners with an ability to identify the potential for improvements to customer service and to support the implementation of improvements to customer service.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1. Understand how to support customer service improvements
2. Be able to identify the potential for improvements to customer service
3. Be able to support the implementation of improvements to customer service

Guided learning hours
It is recommended that **12** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Sources of information may include but are not limited to:
- Customer surveys
- Research Studies
- Analysis of data

Constraint is a limit or restriction.

Relevant people may include, but are not limited to:
- Colleagues
- Managers
- Shareholders

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS20   Support customer service improvements
Learning outcomes and assessment criteria

Outcome 1   Understand how to support customer service improvements

The learner can:
1   describe different sources of information that may help identify ways of improving customer service
2   describe the constraints on suggesting improvements to customer service
3   explain the limits of their own authority in implementing improvements

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

The learner can:
1   use information from a range of sources to understand the customer experience
2   identify potential areas where customer service could be improved from an analysis of information
3   make recommendations for improvement that are based on evidence from analysed information

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

The learner can:
1   implement agreed improvements within the limits of their own authority
2   inform customers of improvements to customer service
3   identify the impact of improvements to customer service and feedback to relevant people
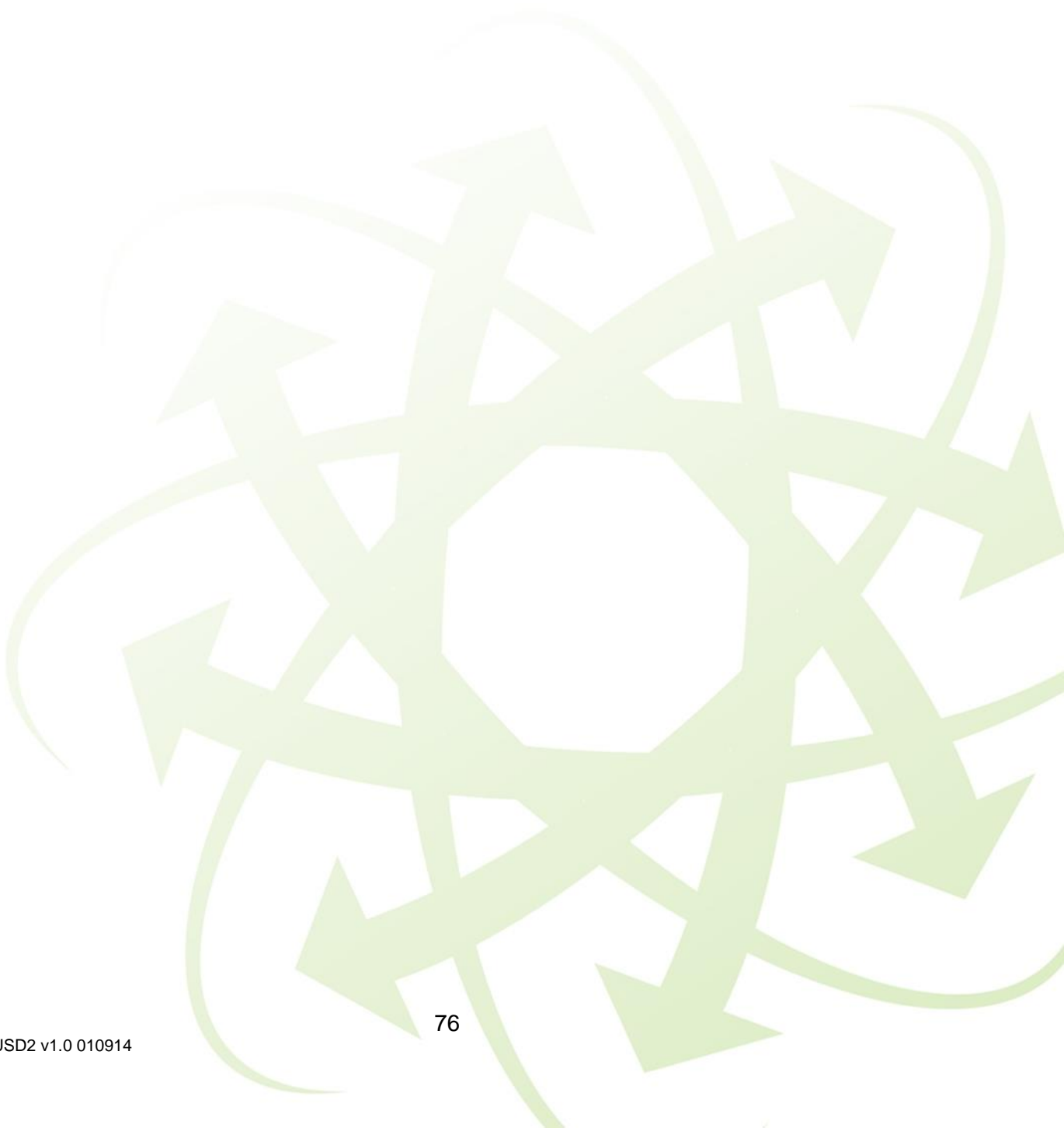
75

CUS21

Support customers through real-time online customer service

CUS21 Support customers through real-time online customer service

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to support customers through real-time online customer service. It will also provide learners with an ability to establish the customer service support needed by customers and to support online customer service in real-time.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1. Understand how to support customers through real-time online customer service
2. Be able to establish the customer service support needed by customers
3. Be able to support online customer service in real-time

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Online customer service systems could include, but not be limited to:
• Automated online assistants
• Instant messages
• Technical support operator/ technician

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

Simulation is not allowed.

CUS21   Support customers through real-time online customer service
Learning outcomes and assessment criteria

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

The learner can:
1   explain how an organisation's online customer service system works
2   explain how to navigate their own customer service site
3   describe the questioning techniques that may be used when supporting customers through real-time on-line customer services
4   explain how to adapt their own communication style to meet customers' ability to use online systems

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

The learner can:
1   identify customers' familiarity with the site
2   identify the difficulties faced by customers when navigating websites
3   identify the support for customers that will meet their needs

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

The learner can:
1   step through screen sequences while the customer operates the system
2   communicate with customers in terms they can understand
3   inform customers of what is happening and why certain steps are required
4   adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

CUS22

Support customers using self-service equipment

CUS22   Support customers using self-service equipment

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to support customers using self-service equipment. It will also provide learners with an ability to identify the help needed by customers, and to help customers, to use self-service equipment.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to support customers using self-service equipment
2.   Be able to identify the help needed by customers using self-service equipment
3.   Be able to help customers to use self-service equipment

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS22   Support customers using self-service equipment

Learning outcomes and assessment criteria

Outcome 1   Understand how to support customers using self-service equipment

The learner can:
1. explain how the self-service equipment works
2. describe problems that are commonly encountered by customers when using self-service equipment
3. explain demonstration techniques to use when supporting customers using self-service equipment
4. explain organisational procedures for the use of equipment and fault reporting

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

The learner can:
1. identify signs that show when a customer is having difficulty with the self-service equipment
2. identify a style and level of intervention that meets customers' needs

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

The learner can:
1. maintain a professional, polite and approachable manner while monitoring customers' use of equipment
2. use staff override functions to enable self-service equipment to be used by customers
3. explain to customers how to use the equipment and complete the transaction
4. report equipment-related errors and issues to the right person
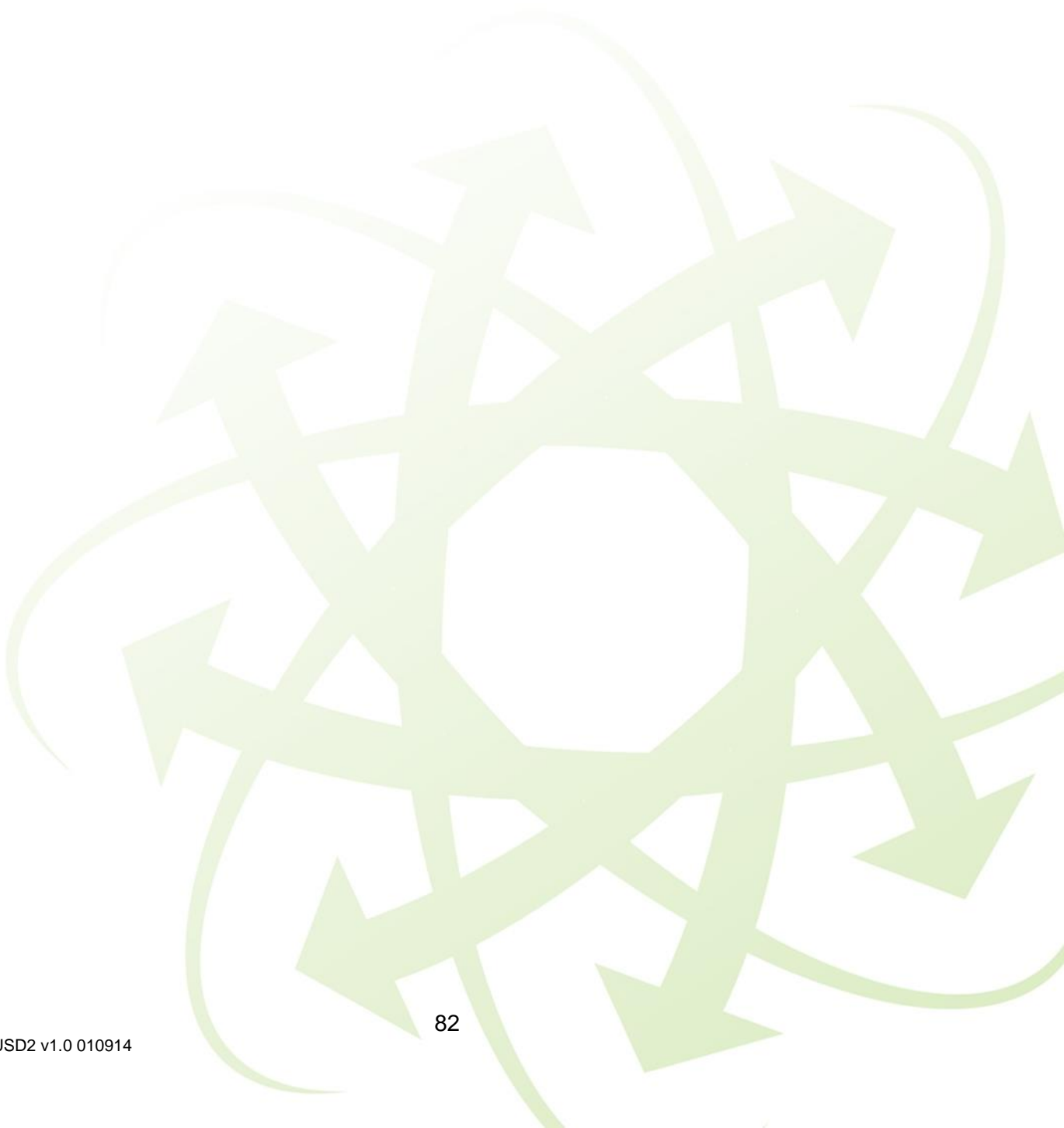
81

CUS23

Use social media to deliver customer service

CUS23   Use social media to deliver customer service

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of social media in a business environment and to apply this understanding to deal with customers using social media.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand social media in a business environment
2.   Be able to deal with customers using social media

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Social media platforms may include but are not limited to - Twitter, Facebook, Online forums

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS23   Use social media to deliver customer service

Learning outcomes and assessment criteria

Outcome 1   Understand social media in a business environment

The learner can:
1   explain how different social media platforms can be used for customer service
2   describe different audience groups for a range of social media platforms
3   explain the importance of monitoring customer posts in social media networks
4   explain organisational policy and guidelines for the use of social media for customer service purposes
5   explain the etiquette of communication within different social media platforms
6   explain the importance of security settings and how they are used on different social media platforms
7   identify the information that can be shared when colleagues are involved in exchanges using social media

Outcome 2   Be able to deal with customers using social media

The learner can:
1   monitor social media to identify customer questions, requests and comments
2   make responses that are appropriate to posts made by customers on social media networks
3   take action to ensure that customers are satisfied before closing dialogue
4   adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

CUS24

Provide post-transaction customer service

CUS24   Provide post-transaction customer service

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of post-transaction customer service and to apply this understanding to provide post-transaction customer service.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand post-transaction customer service
2.   Be able to provide post-transaction customer service

Guided learning hours
It is recommended that **22** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

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

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

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

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

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

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

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS24   Provide post-transaction customer service
Learning outcomes and assessment criteria

Outcome 1   Understand post-transaction customer service

The learner can:
1   explain organisational policies and procedures for post-transaction customer service
2   explain the purposes and range of post-transaction activities
3   explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
4   explain how legislation and regulation affect customers' rights
5   explain the advantages and disadvantages of post-transaction customer service programmes

Outcome 2   Be able to provide post-transaction customer service

The learner can:
1   implement a programme of planned post-transaction interventions in line with organisational guidelines
2   use unplanned opportunities post-transaction to provide customer service
3   identify reasons for contacting customers post-transaction
4   confirm customers' levels of satisfaction post-transaction
5   make recommendations to decision makers to enhance customer satisfaction
6   present a professional and helpful image

CUS31

Resolve customers' complaints
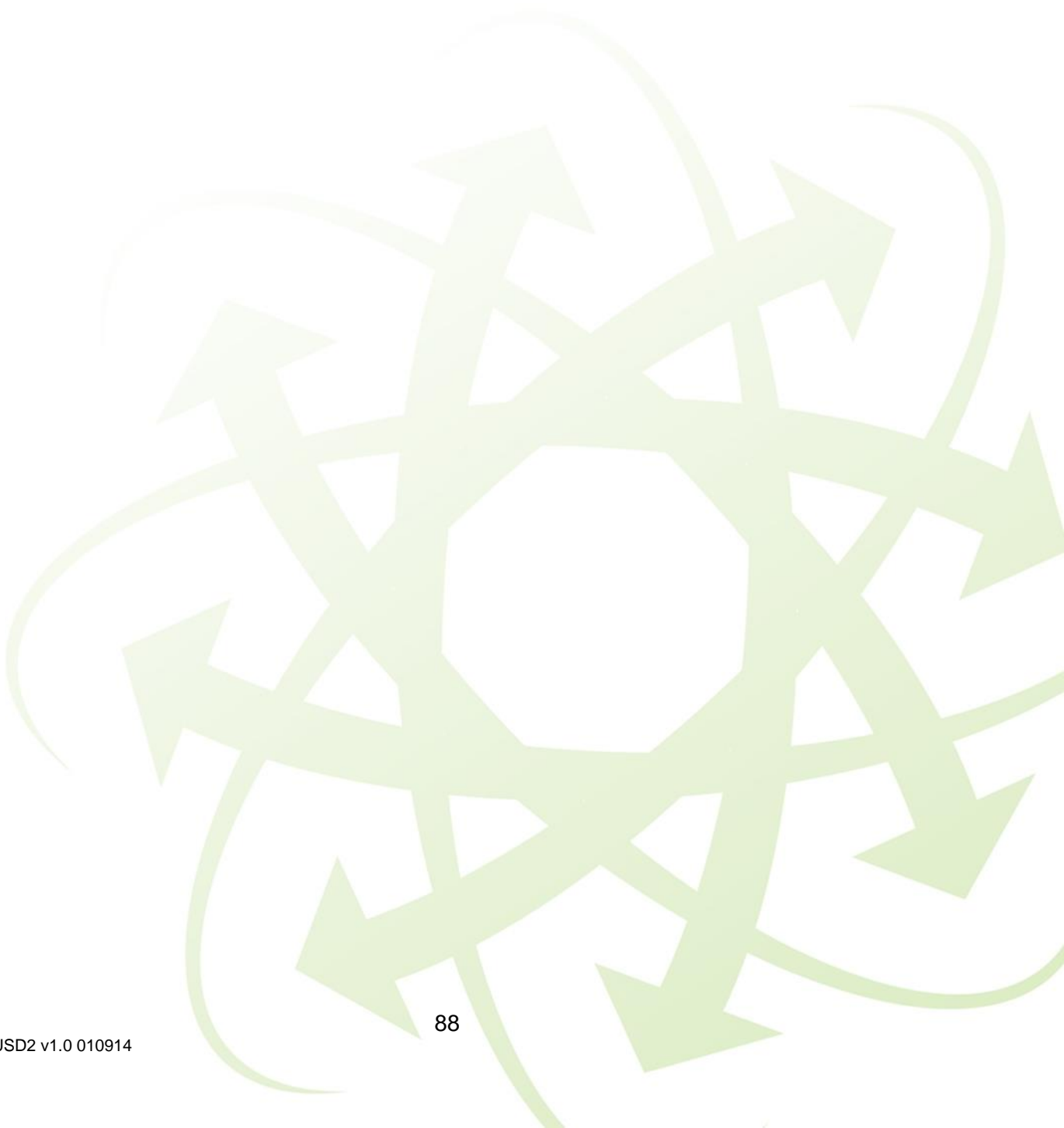
CUS31   Resolve customers' complaints

Level: 3

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of the monitoring and resolution of customers' complaints and to apply this understanding to deal with customers' complaints.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the monitoring and resolution of customers' complaints
2.   Be able to deal with customers' complaints

Guided learning hours
It is recommended that **22** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Monitoring techniques may include, but are not limited to:
- Record keeping
- Customer Contact Systems
- E-mails
- Letters
- Task-specific documents

Negotiating techniques may include, but are not limited to:
- Compensation
- Replacement
- Cost reduction
- Upgrade
- Standard communication
- Referral to specialist team

Conflict management techniques may include, but are not limited to:
- Standard Communication
- Referral to specialist team
- Explanation at source
- 'Second facing' at source

Organisational procedures may include, but are not limited to:
- Explanation at source
- 'Second facing' at source
- Compensation
- Replacement
- Cost reduction
- Upgrade
- Standard Communication
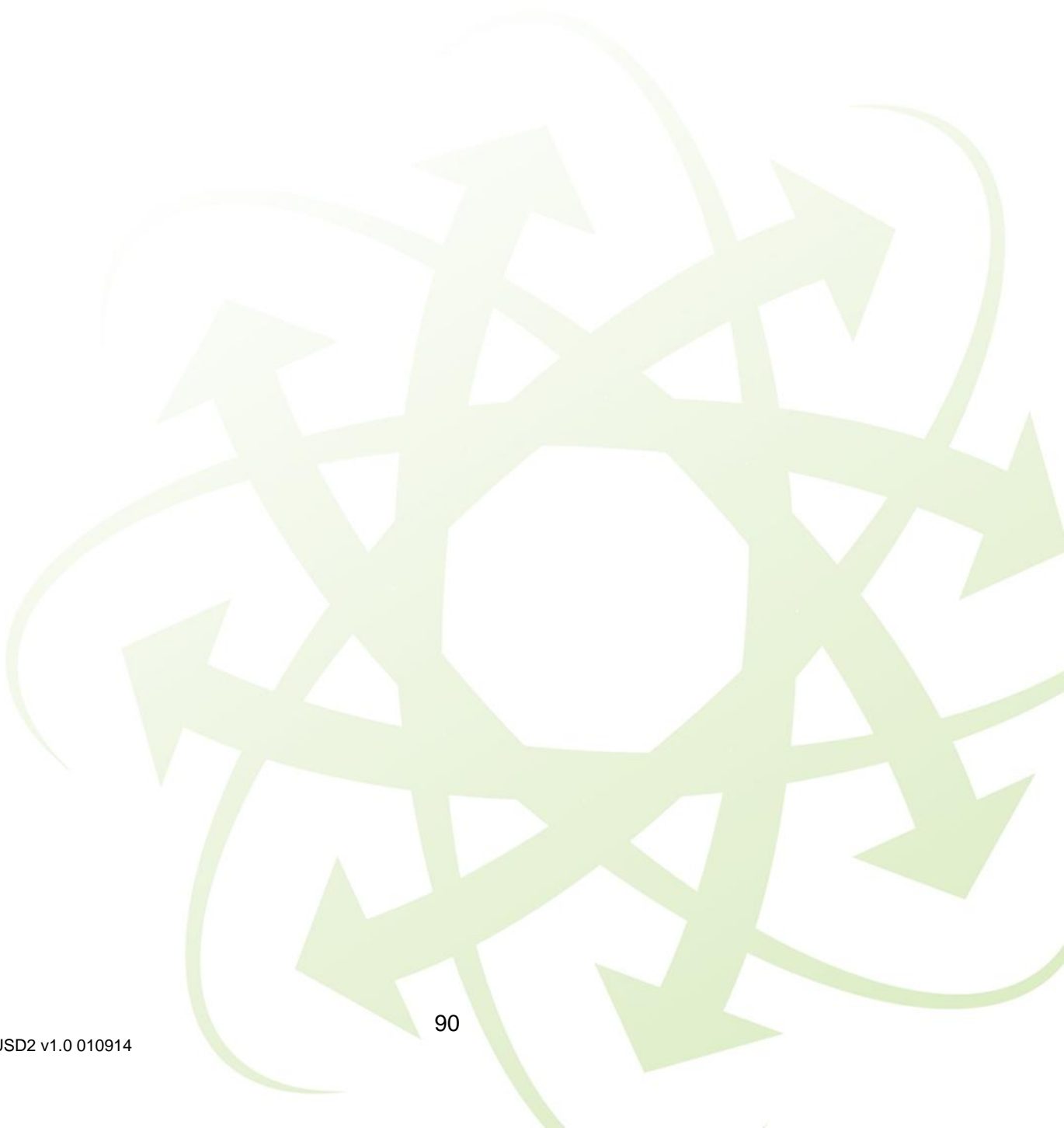- Referral to specialist team

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit

CUS31   Resolve customers' complaints

Learning outcomes and assessment criteria

Outcome 1   Understand the monitoring and resolution of customers' complaints

The learner can:
1. assess the suitability of a range of monitoring techniques for customers' complaints
2. explain how to identify those complaints that should prompt a review of the service offer and service delivery
3. explain negotiating techniques used to resolve customers' complaints
4. explain conflict management techniques used in dealing with upset customers
5. explain organisational procedures for dealing with customer complaints
6. explain when to escalate customers' complaints
7. explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
8. explain the advantages and limitations of offering compensation or replacement products and/or services

Outcome 2   Be able to deal with customers' complaints

The learner can:
1. confirm the nature, cause and implications of customers' complaints
2. take personal responsibility for dealing with complaints
3. communicate in a way that recognises customers' problems and understands their points of view
4. explain the advantages and limitations of different complaint response options to customers
5. explain the advantages and limitations of different complaint response options to the organisation
6. keep customers informed of progress
7. agree solutions with customers that address the complaint and which are within the limits of their own authority
8. record the outcome of the handling of complaints for future reference
9. adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

CUS32

Gather, analyse and interpret customer feedback

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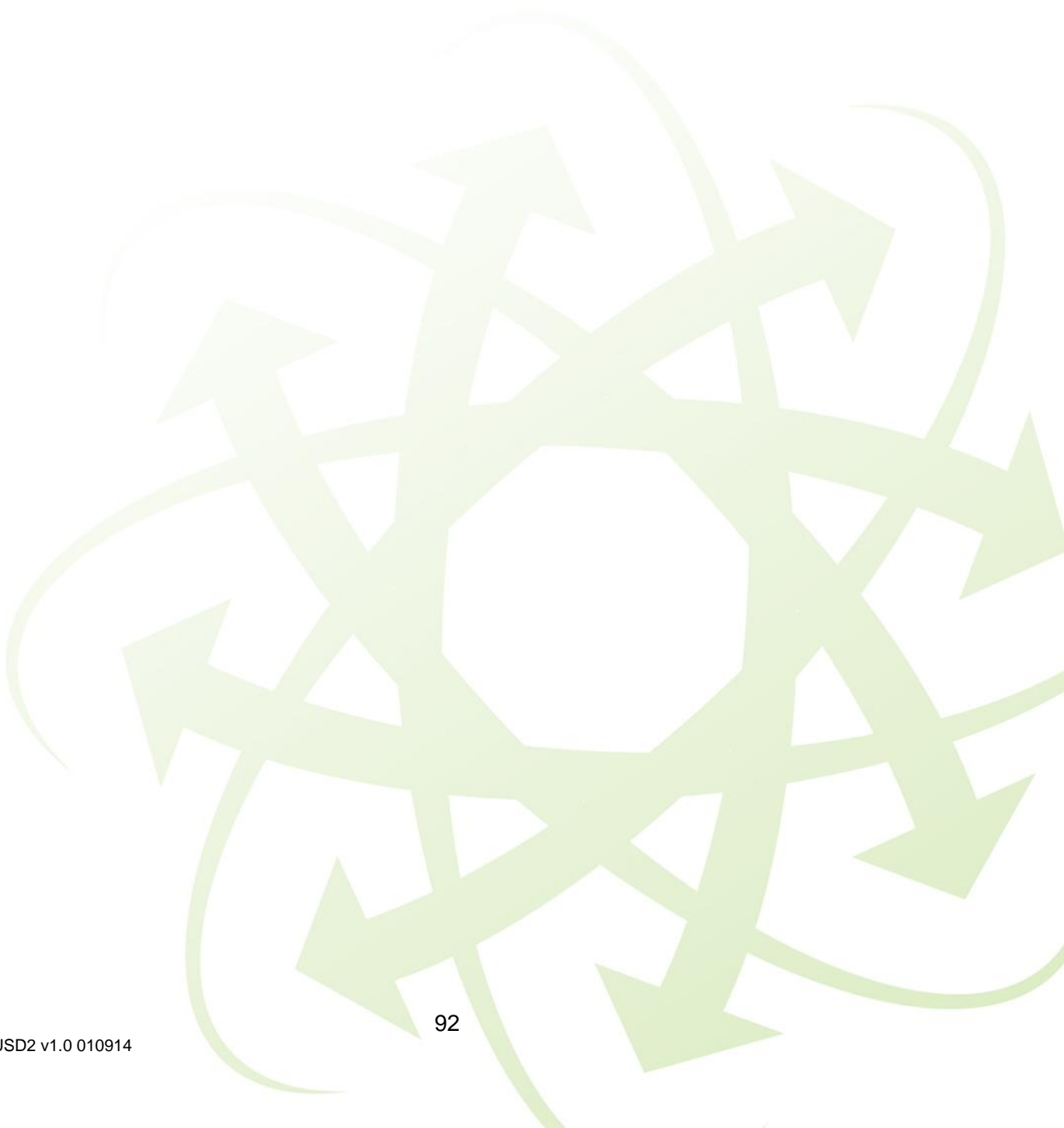
CUS32   Gather, analyse and interpret customer feedback

Level: 3

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of how to gather, analyse and interpret customer feedback. It will also provide learners with an ability to plan the collection of customer feedback on customer service issues, to gather customer feedback and to analyse and interpret this feedback to recommend improvements.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand how to gather, analyse and interpret customer feedback
2.   Be able to plan the collection of customer feedback on customer service issues
3.   Be able to gather customer feedback
4.   Be able to analyse and interpret customer feedback to recommend improvements

Guided learning hours
It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Bias refers to inclination or prejudice for or against

Techniques to analyse customer feedback could include, but not be limited to:
- Verifying data
- Identifying over-arching themes
- Highlighting 'quick wins' and 'red alerts'

Techniques to monitor the quality of data collected may include,
- Sampling
- Monitoring
- Review of methods used

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

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

Data collection methods could include:
- Surveys
- Monitoring social media
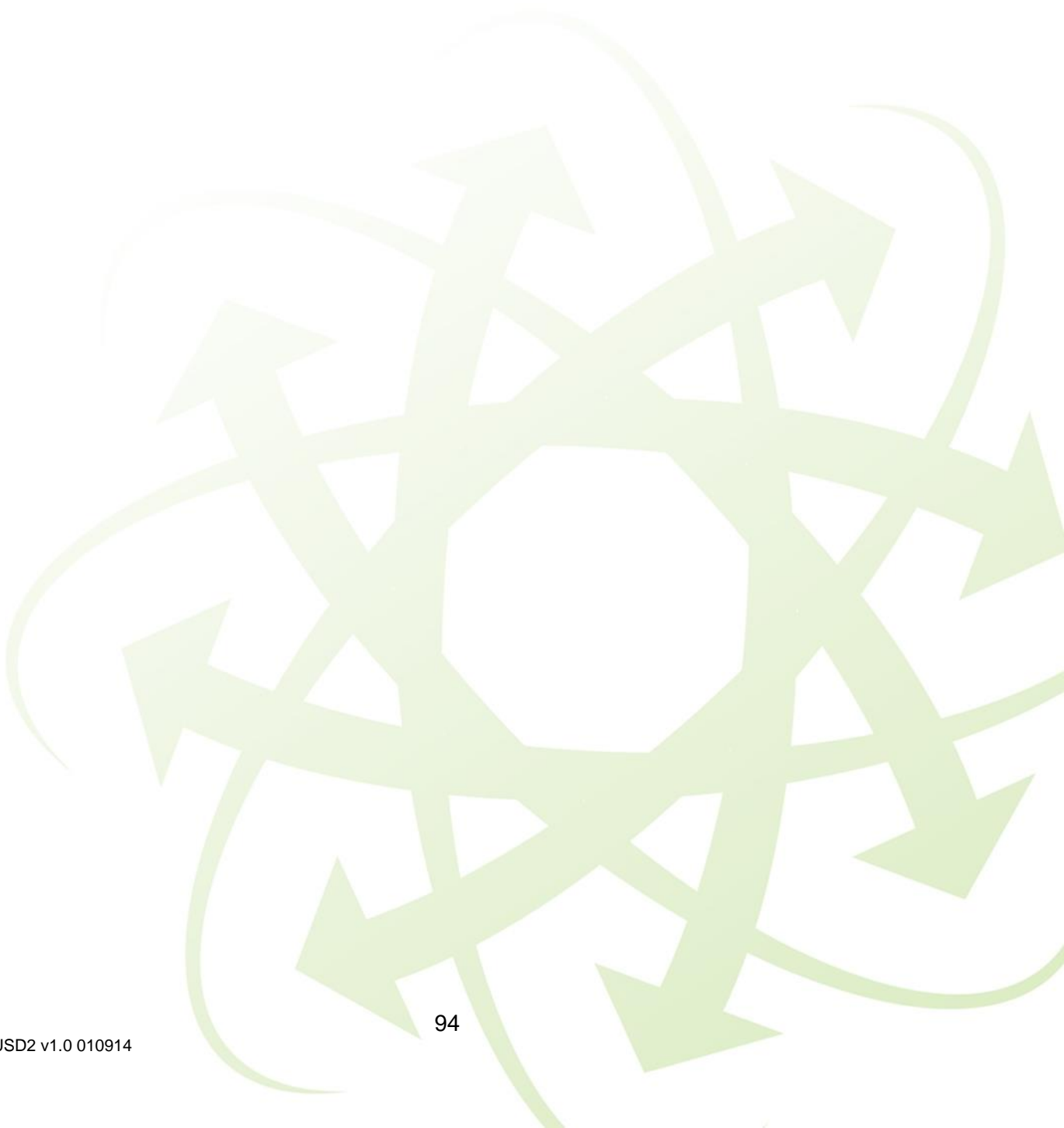- Comments boxes
- Email/contact forms

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

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CUS32   Gather, analyse and interpret customer feedback

Learning outcomes and assessment criteria

Outcome 1   Understand how to gather, analyse and interpret customer feedback

The learner can:
1. describe methods of collecting data for customer research
2. explain random sampling techniques used to collect data
3. explain how to evaluate bias in non-random samples
4. explain the principles of questionnaire design
5. assess the suitability of a range of techniques to analyse customer feedback
6. explain techniques used to monitor the quality of data collected
7. explain the use of software to record and analyse customer feedback
8. explain the validation issues associated with customer feedback
9. explain the importance of anonymising comments from customers who do not wish to be identified

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

The learner can:
1. identify the objectives of collecting customer feedback
2. justify the reasons for selecting different data collection methods
3. develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe

### Outcome 3   Be able to gather customer feedback

The learner can:
1. collect customer feedback using the sampling frame identified in a customer service plan
2. record data in a way that makes analysis straightforward
3. verify that all data is handled in line with legal, organisational and ethical policies and procedures

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

The learner can:
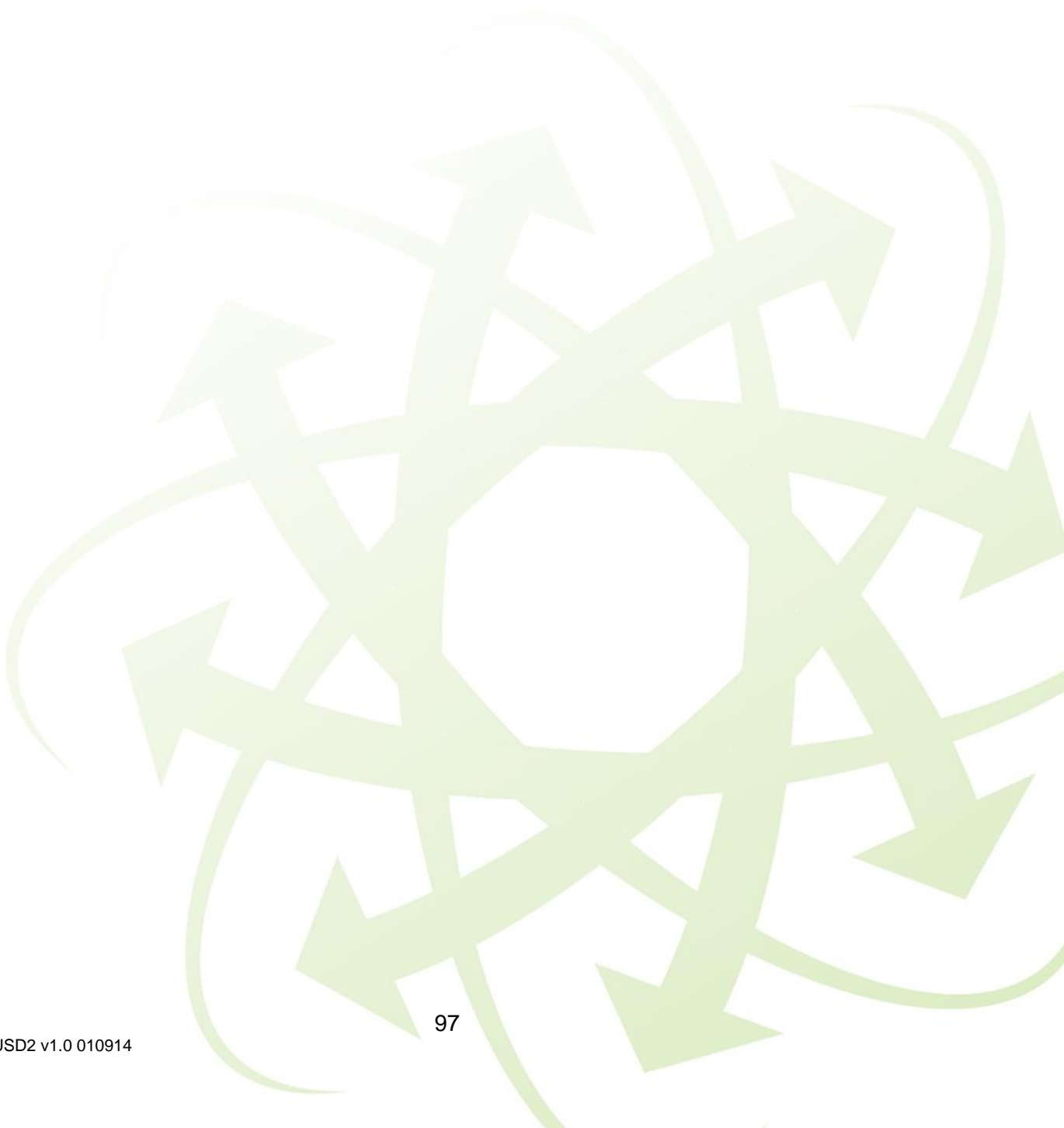1. use data analysis methods to identify patterns and trends in customer feedback
2. use the findings of a data analysis to identify areas for improvement to customer service
3. present the findings of an analysis in the agreed format
4. recommend improvements in response to the findings of an analysis

7.5 Group C - optional units
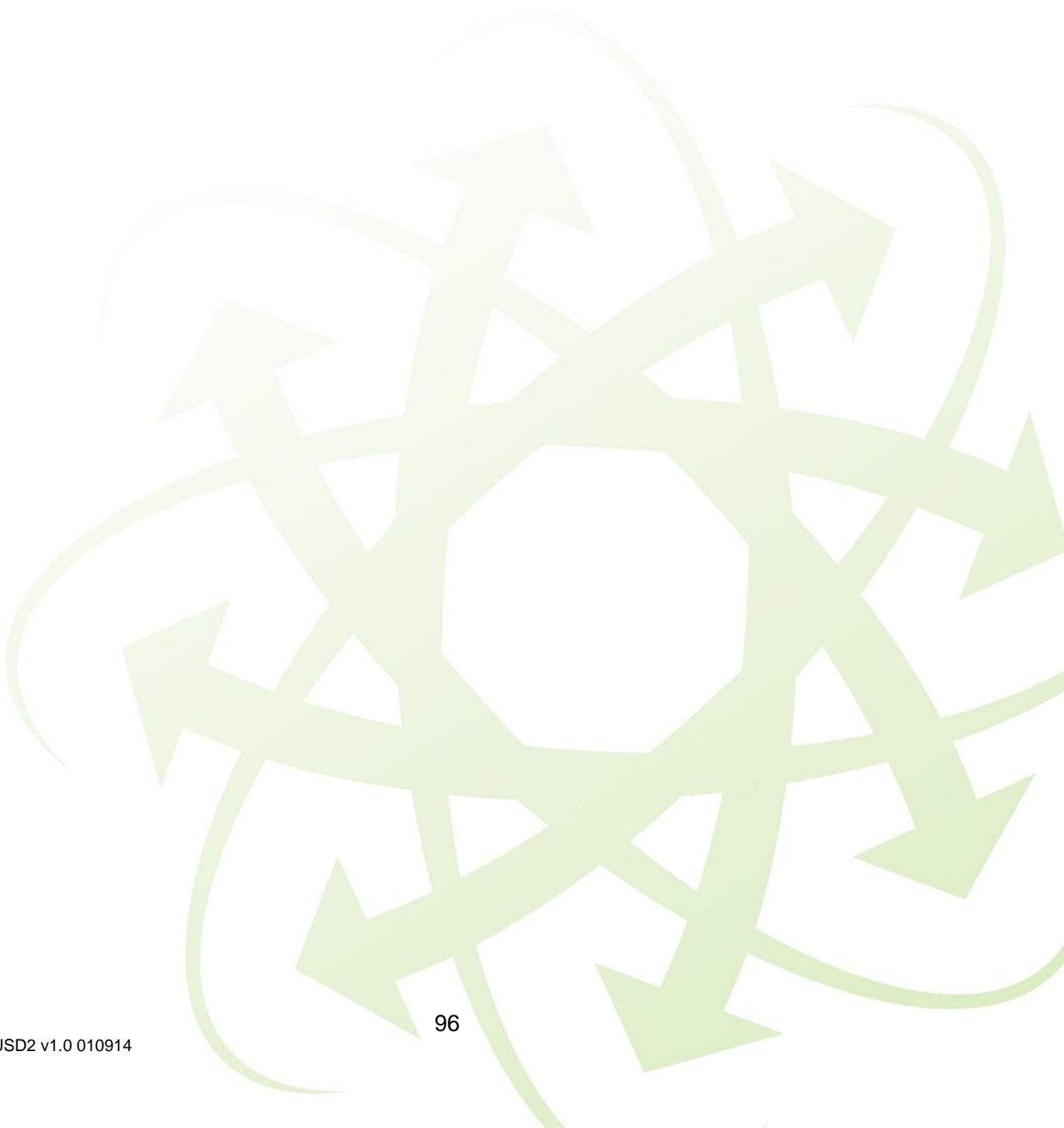
BUS13

Manage diary systems

BUS13   Manage diary systems

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the management of diary systems and the ability to carry out this activity.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the management of diary systems
2.   Be able to manage diary systems

Guided learning hours
It is recommended that **12** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Diary systems could include:
•   Paper diaries
•   Electronic diary systems

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS13   Manage diary systems

Learning outcomes and assessment criteria

Outcome 1   Understand the management of diary systems

The learner can:
1   explain the importance of keeping diary systems up to date
2   describe the basis on which bookings and changes are prioritised
3   explain any constraints relating to making bookings for people or facilities
4   describe the types of problems that can occur when managing diaries

Outcome 2   Be able to manage diary systems

The learner can:
1   obtain the information needed to make diary entries
2   make accurate and timely diary entries
3   respond to changes in a way that balances and meets the needs of those involved
4   communicate up-to-date information to everyone involved
5   keep diaries up-to-date
6   maintain the requirements of confidentiality

BUS19

Provide reception services
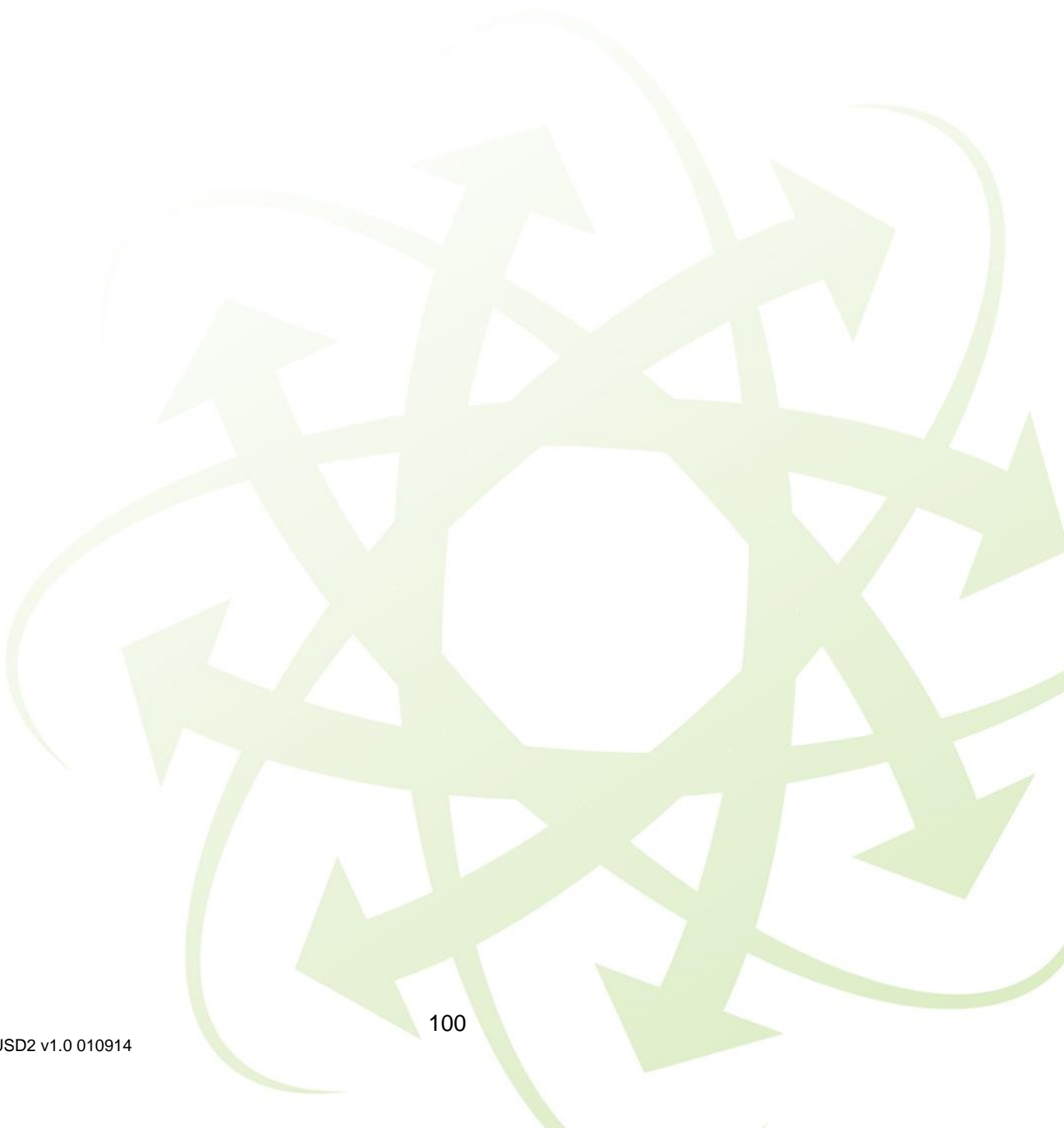
BUS19   Provide reception services

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of reception services
and the ability to provide a reception service

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand reception services
2.   Be able to provide a reception service

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time
or part-time basis.

Assessment guidance
Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS19   Provide reception services

Learning outcomes and assessment criteria

Outcome 1   Understand reception services

The learner can:
1   explain the receptionist's role in representing an organisation
2   explain an organisation's structure and lines of communication
3   describe an organisation's standards of presentation
4   explain the health, safety and security implications of visitors to a building
5   explain how to deal with challenging people

Outcome 2   Be able to provide a reception service

The learner can:
1   welcome visitors in accordance with organisational standards
2   direct visitors to the person they are visiting in accordance with organisational standards
3   record visitors' arrivals and departures in accordance with organisational procedures
4   provide advice and accurate information within organisational guidelines on confidentiality
5   keep the reception area tidy and materials up-to-date
6   answer and deal with telephone calls within organisational standards
7   adhere to organisational procedures on entry, security, health and safety

BUS27

Contribute to the organisation of an event
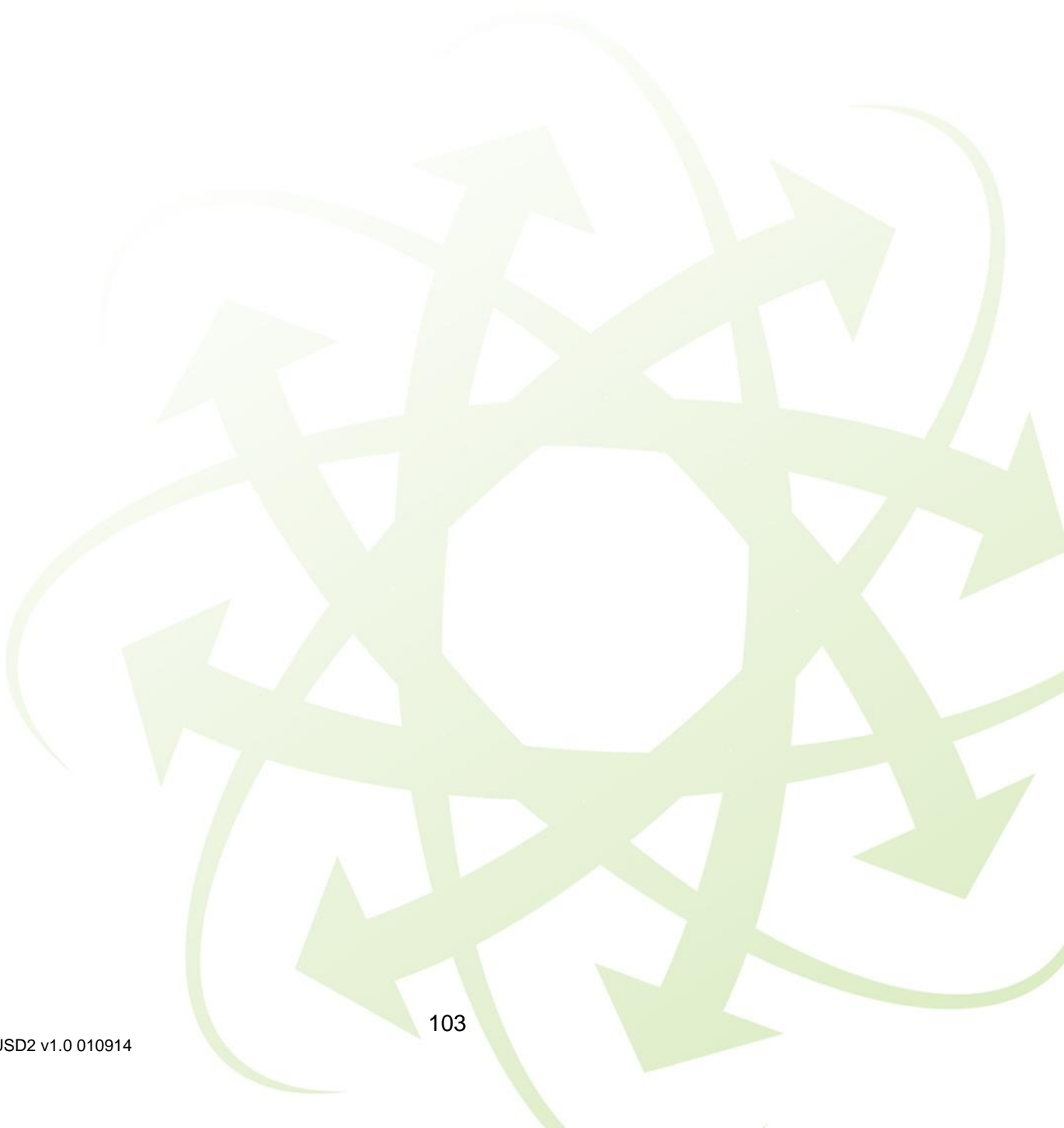
BUS27   Contribute to the organisation of an event

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of event organisation and the ability to carry out pre-event actions, set up an event and to carry out post-event actions

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand event organisation
2.   Be able to carry out pre-event actions
3.   Be able to set up an event
4.   Be able to carry out post-event actions

Guided learning hours
It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

An **Event** may include, but is not limited to a:
• Meeting
• Announcement
• Celebration
• Social Occasion
• Product Launch

Resources may include but are not limited to:
• Human resource
• Equipment
• Materials
• Public address systems
• Information technology

Pre-event documentation may include, but is not limited to:
• Invitations
• Meeting requests
• Preparatory notes
• Agenda
• Menu
• Health & safety forms

Special requirements may include, but are not limited to:
• Mobility
• Translation or interpretation services
• Special dietary requirements
• Allergies
• Travel and accommodation bookings
• Religious or cultural requirements
• Security requirements

The **layout** includes the arrangement of furniture and other environmental features

Organisational values are the general principles or standards of behaviour that are expected within an organisation

Organisational standards are defined levels of expectation for a specific behaviour set by an organisation

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS27   Contribute to the organisation of an event
Learning outcomes and assessment criteria

Outcome 1   Understand event organisation

The learner can:
1   explain the roles, responsibilities and accountabilities of individuals involved in the event
2   explain the purpose and features of different types of events
3   describe the type of resources needed for different types of events
4   describe the different needs attendees may have and how to meet these
5   explain the requirements of health, safety and security when organising events
6   describe the types of problems that may occur during events and how to deal with them

Outcome 2   Be able to carry out pre-event actions

The learner can:
1   explain the roles, responsibilities and accountabilities of individuals involved in the event
2   explain the purpose and features of different types of events
3   describe the type of resources needed for different types of events
4   describe the different needs attendees may have and how to meet these
5   explain the requirements of health, safety and security when organising events
6   describe the types of problems that may occur during events and how to deal with them

Outcome 3   Be able to set up an event

The learner can:
1   set up layout and resources in accordance with the event plan
2   confirm that all identified resources are in place and meet requirements
3   behave in a way that maintains organisational values and standards

Outcome 4   Be able to carry out post-event actions

The learner can:
1   ensure the venue is restored to the required conditions in accordance with the terms of the contract
2   carry out follow-up actions in accordance with the event plan and agreements made at the event

BUS35

Buddy a colleague to develop their skills
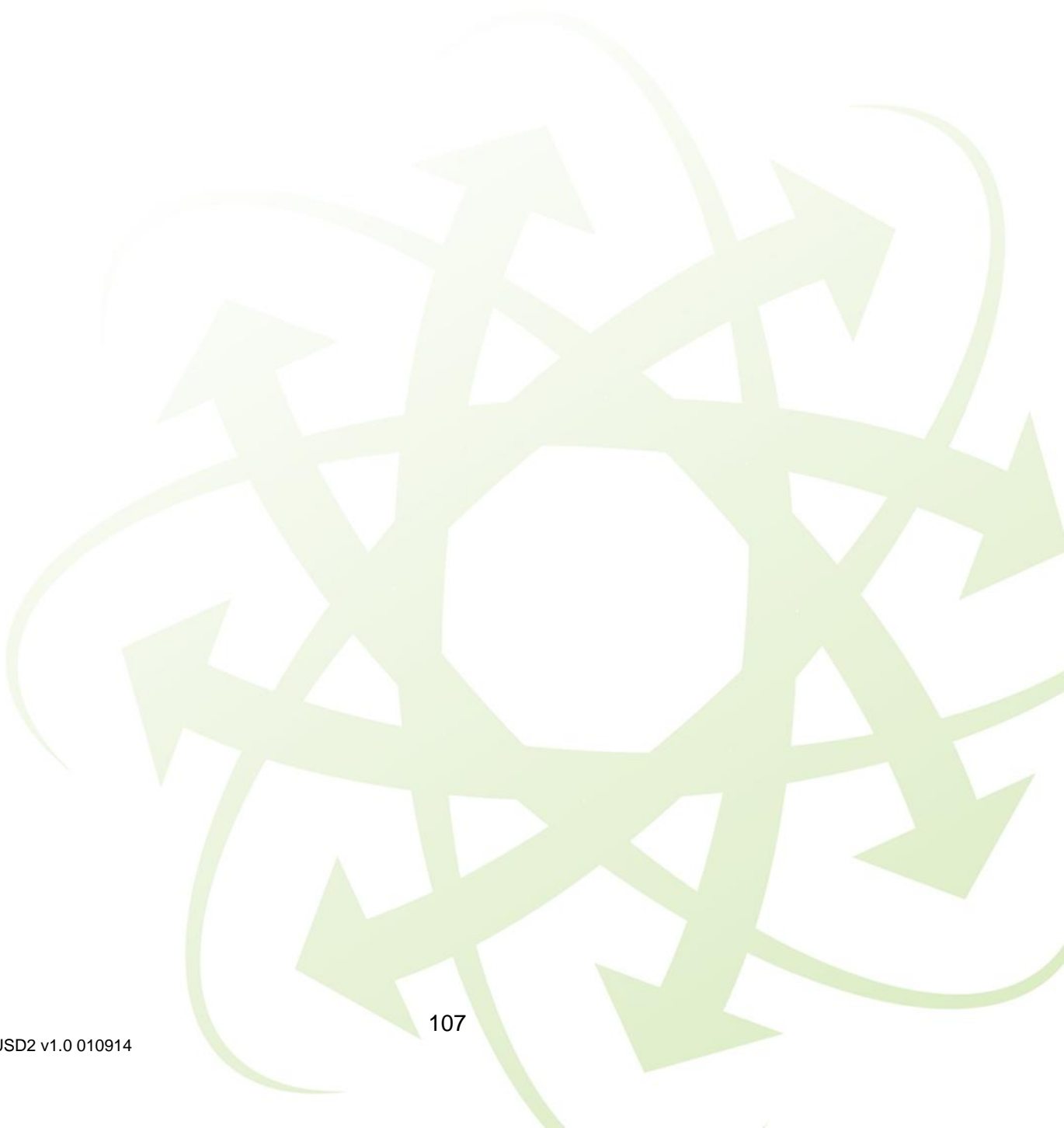
BUS35   Buddy a colleague to develop their skills

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to buddy a colleague and the ability to plan the buddying of a colleague and to support a buddy colleague carrying out their work activities

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to buddy a colleague
2.   Be able to plan to buddy a colleague
3.   Be able to support a buddy colleague carrying out work activities

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques to give positive feedback may include:
*   Medium used to provide feedback
*   Giving praise
*   Timing
*   Location and approach

Techniques to establish rapport may include:
*   Body language
*   Listening actively
*   Speech tone
*   Understand strengths and weaknesses of each other
*   Collaboration and partnership working
*   Build objectives and aims

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS35   Buddy a colleague to develop their skills
Learning outcomes and assessment criteria

Outcome 1   Understand how to buddy a colleague

The learner can:
1   describe what is expected of a buddy
2   explain techniques to give positive feedback and constructive criticism
3   explain techniques to establish rapport with a buddy

Outcome 2   Be able to plan to buddy a colleague

The learner can:
1   agree which aspects of a colleague's work may benefit from buddying
2   confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
3   agree a schedule of meetings that minimise disruption to business
4   agree specific, measurable, achievable, realistic and time-bound (smart) buddying objectives

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

The learner can:
1   remain unobtrusive while a buddy colleague carries out their work activities
2   provide examples of how to carry out tasks correctly
3   identify instances of good practice and areas for improvement through observation
4   praise a buddy colleague on well completed tasks
5   give constructive feedback on ways in which a buddy could improve performance
6   offer a buddy hints and tips based on personal experience

BUS39

Employee rights and responsibilities
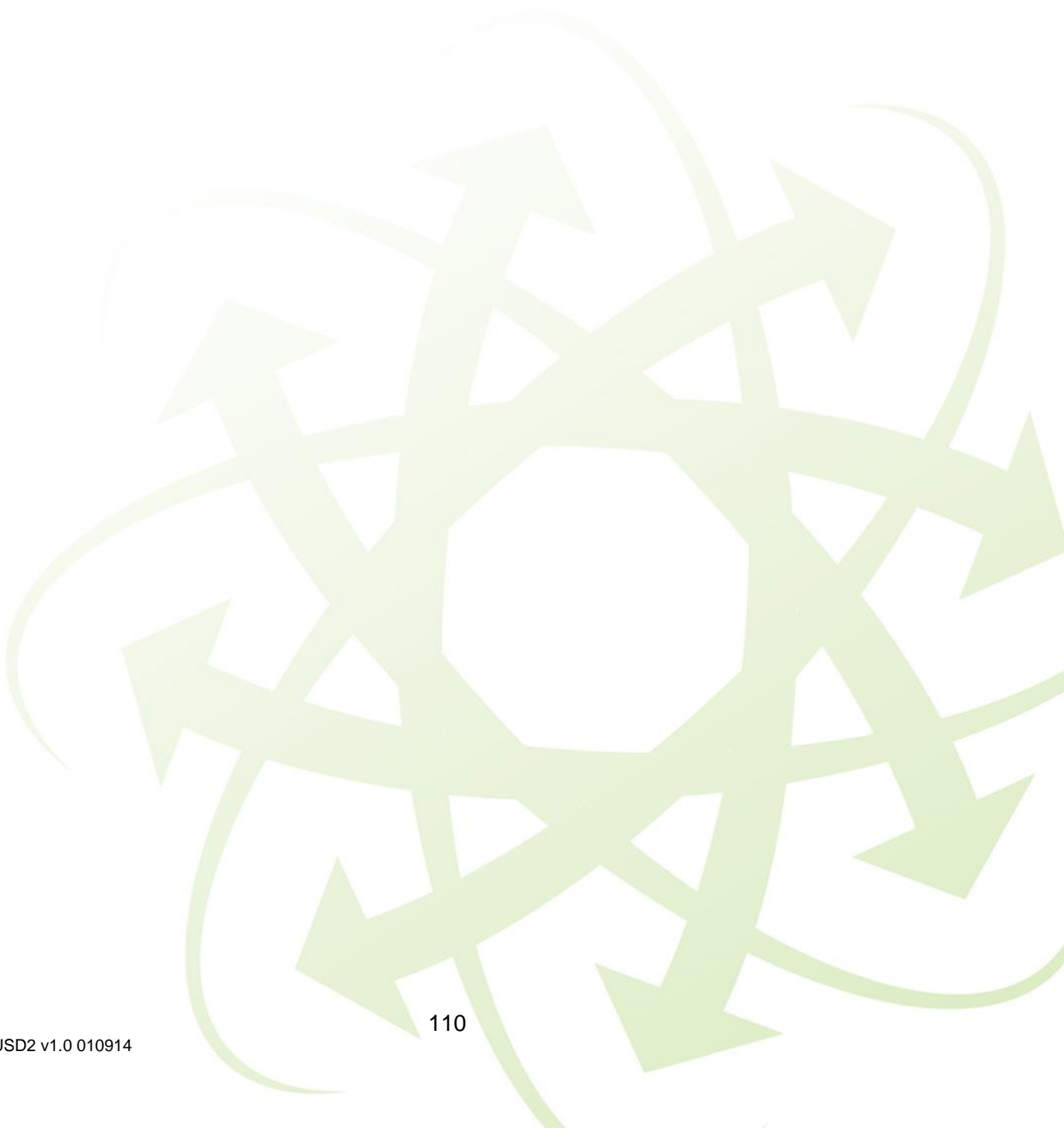
BUS39   Employee rights and responsibilities

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the role of organisations and industries, employers' expectations and employees' rights and obligations.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the role of organisations and industries
2.   Understand employers' expectations and employees' rights and obligations

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS39   Employee rights and responsibilities
Learning outcomes and assessment criteria

Outcome 1   Understand the role of organisations and industries

The learner can:
1. explain the role of their own occupation within an organisation and industry
2. describe career pathways within their organisation and industry
3. identify sources of information and advice on an industry, occupation, training and career pathway
4. describe an organisation's principles of conduct and codes of practice
5. explain issues of public concern that affect an organisation and industry
6. describe the types, roles and responsibilities of representative bodies and their relevance to their own role

### Outcome 2   Understand employers' expectations and employees' rights and obligations

The learner can:
1. describe the employer and employee statutory rights and responsibilities that affect their own role
2. describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
3. describe the procedures and documentation that protect relationships with employees
4. identify sources of information and advice on employment rights and responsibilities

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BUS42

Negotiate in a business environment

113
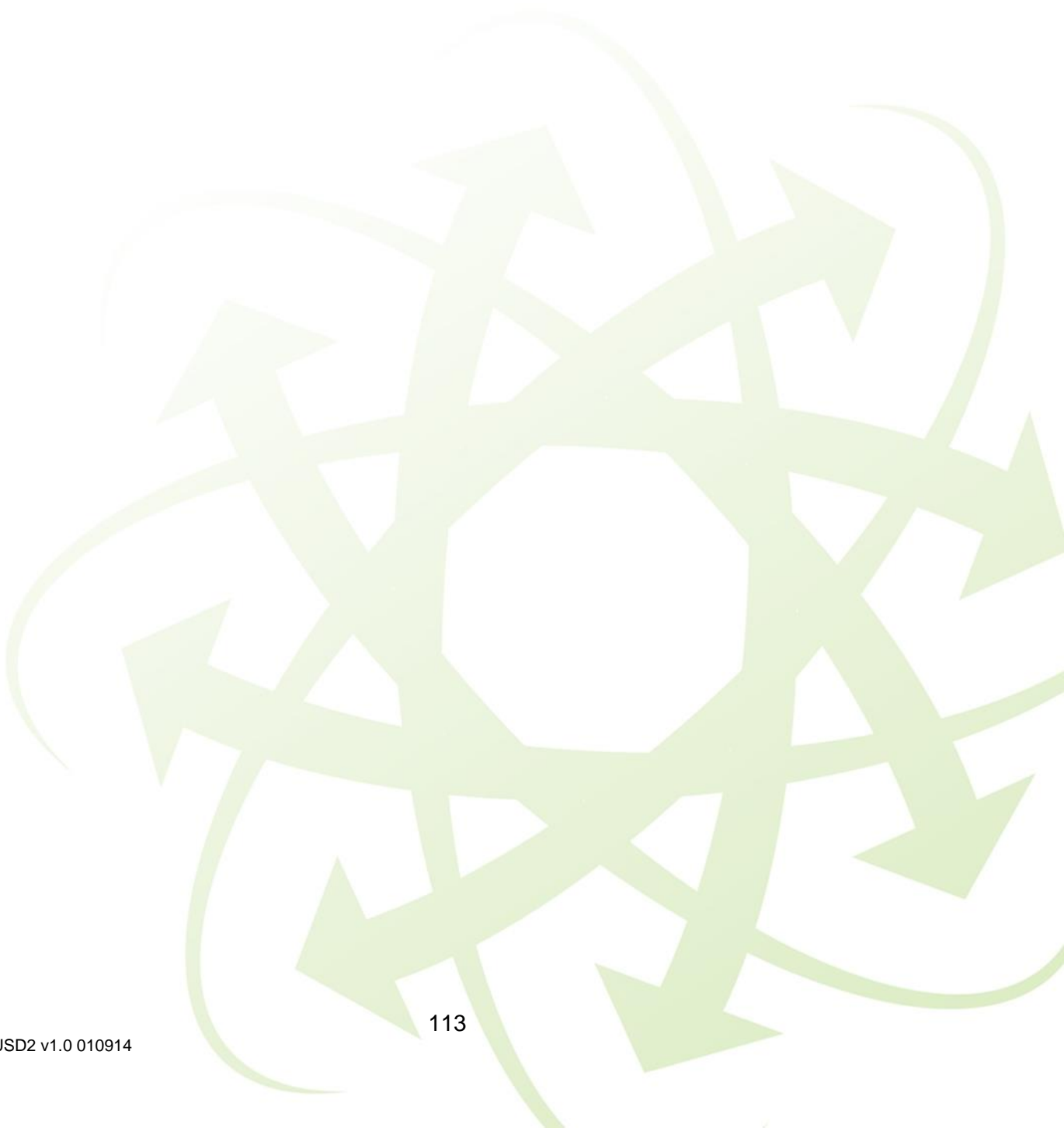
BUS42   Negotiate in a business environment

Level: 3

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of the principles underpinning negotiation and the ability to prepare for, and carry out, business negotiations.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand the principles underpinning negotiation
2.   Be able to prepare for business negotiations
3.   Be able to carry out business negotiations

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS42 Negotiate in a business environment

Learning outcomes and assessment criteria

Outcome 1 Understand the principles underpinning negotiation

The learner can:
1 describe the requirements of a negotiation strategy
2 explain the use of different negotiation techniques
3 explain how research on the other party can be used in negotiations
4 explain how cultural differences might affect negotiations

Outcome 2 Be able to prepare for business negotiations

The learner can:
1 identify the purpose, scope and objectives of the negotiation
2 explain the scope of their own authority for negotiating
3 prepare a negotiating strategy
4 prepare fall-back stances and compromises that align with the negotiating strategy and priorities
5 assess the likely objectives and negotiation stances of the other party
6 research the strengths and weaknesses of the other party

Outcome 3 Be able to carry out business negotiations

The learner can:
1 carry out negotiations within responsibility limits in a way that optimises opportunities
2 adapt the conduct of the negotiation in accordance with changing circumstances
3 maintain accurate records of negotiations, outcomes and agreements made
4 adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

CC19

Carry out direct sales activities in a contact centre
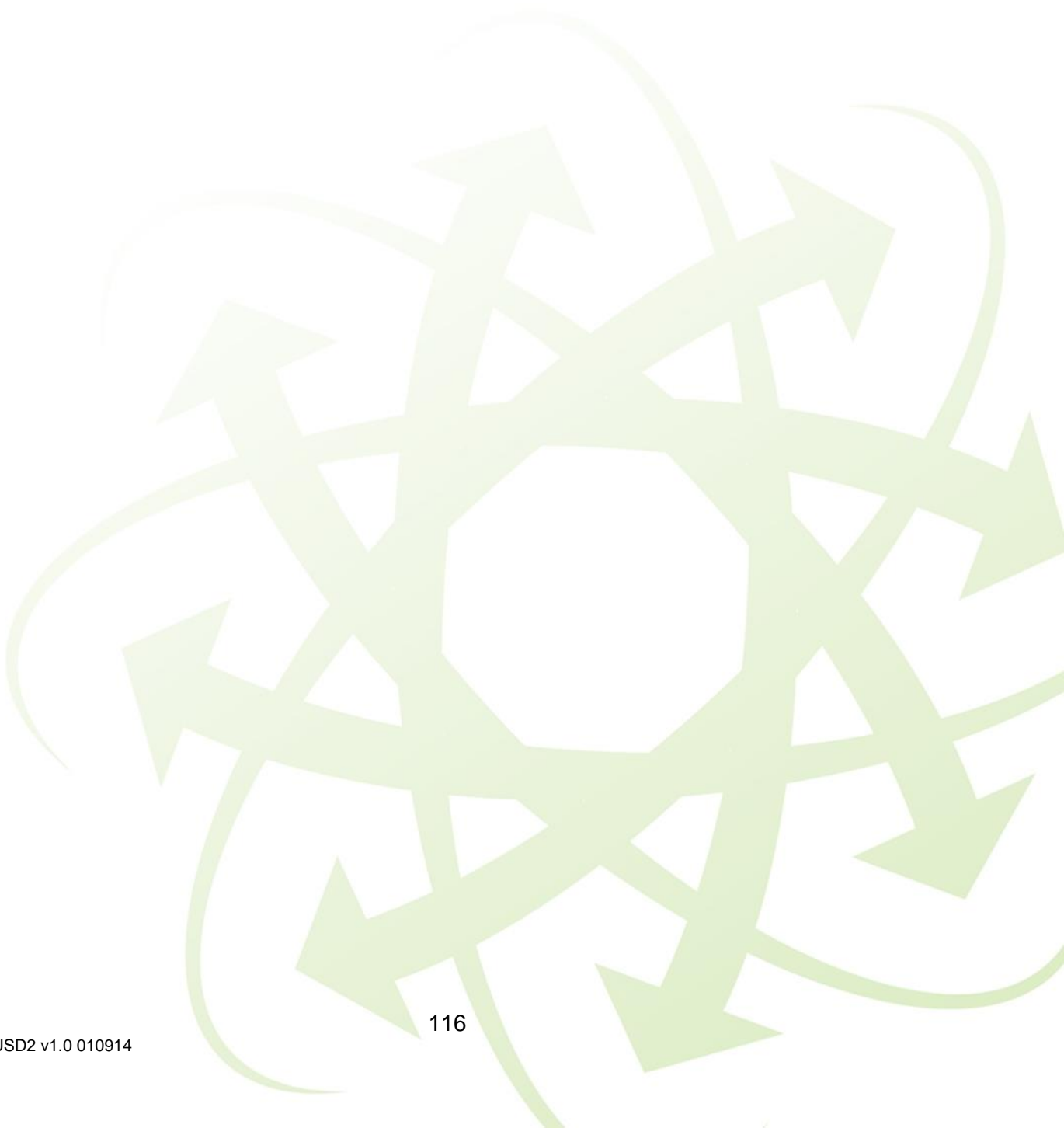
CC19 Carry out direct sales activities in a contact centre

Level: 2

Credit: 5

Unit aims
This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre

There are **five** learning outcomes for this unit. The learner will:
1. Be able to gather information needed for direct sales activities in a contact centre
2. Be able to carry out direct sales to customers through a contact centre
3. Be able to keep direct sales records within a contact centre
4. Be able to comply with regulations and legislation during direct sales in a contact centre
5. Understand how to conduct sales activities in a contact centre

Guided learning hours
It is recommended that **15** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Assessment guidance
Simulation is not allowed.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
This unit is linked to the national occupational standards CC 19

Support of the unit by a sector or other appropriate body
This unit is endorsed by SkillsCfA the SSC for Contact Centre

Evidence Requirements
Learners must provide a portfolio of evidence which must contain a guided discussion with their assessor.

CC19   Carry out direct sales activities in a contact centre

Learning outcomes and criteria

Outcome 1   Be able to gather information needed for direct sales activities in a contact centre

The learner can:
1. assemble information about products and/or services that support direct sales
2. obtain from customers sufficient information to support direct sales activities
3. create sales opportunities by making links between information provided by customers and products and/or services
4. find potential new customers for products and/or services

Outcome 2   Be able to carry out direct sales to customers through a contact centre

The learner can:
1. establish customers' identity in accordance with organisational procedures
2. check customers' wishes and needs
3. identify possible matches with products and/or services from information provided by customers
4. explain to customers the features and benefits of products and/or services for sale
5. adapt their sales approach and style to meet customer preferences
6. maximise opportunities for cross-selling and up-selling
7. complete the authorisation or payment in accordance with organisational procedures

Outcome 3   Be able to keep direct sales records within a contact centre

The learner can:
1. identify the information about customers, products and/or services that should be recorded during the sales process
2. record customer, product and/or service information in accordance with organisational procedures

Outcome 4   Be able to comply with regulations and legislation during direct sales in a contact centre

The learner can:
1. identify the regulatory requirements that have an impact on direct sales activities through a contact centre
2. ensure compliance with regulations during direct selling through a contact centre

Outcome 5   Understand how to conduct sales activities in a contact centre

The learner can:
1. describe the features and benefits of the products and/or services offered or supported by the contact centre
2. describe the organisational policies and procedures for direct sales through a contact centre
3. describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
4. describe the common objections and questions raised by customers during direct selling
5. explain how to identify cross-selling and up-selling opportunities
6. describe different methods of researching potential new customers
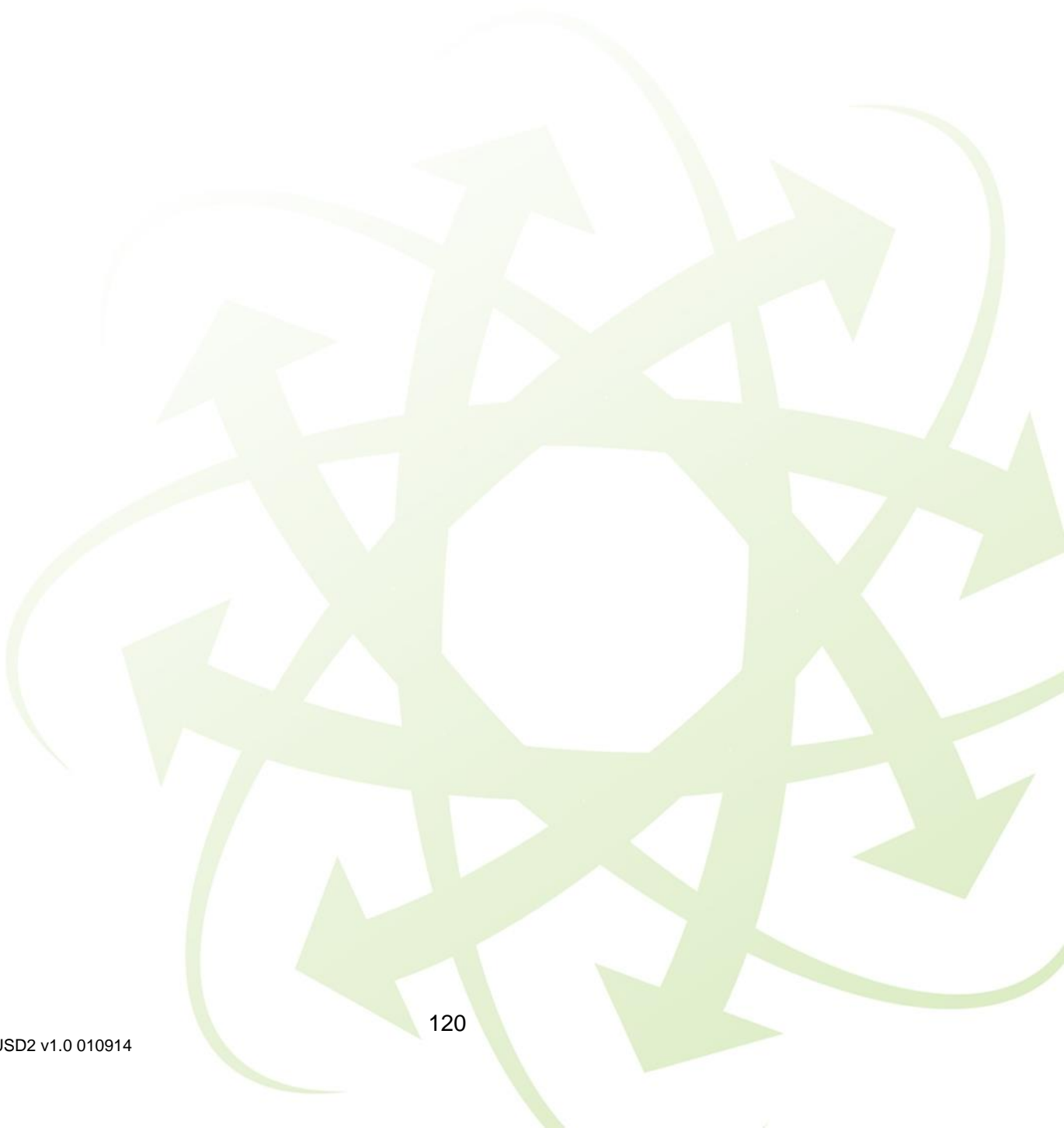7. explain how to retrieve information from organisational sales records

8   describe the organisational procedures for ensuring compliance with relevant regulation
     and legislation that have an impact on direct selling
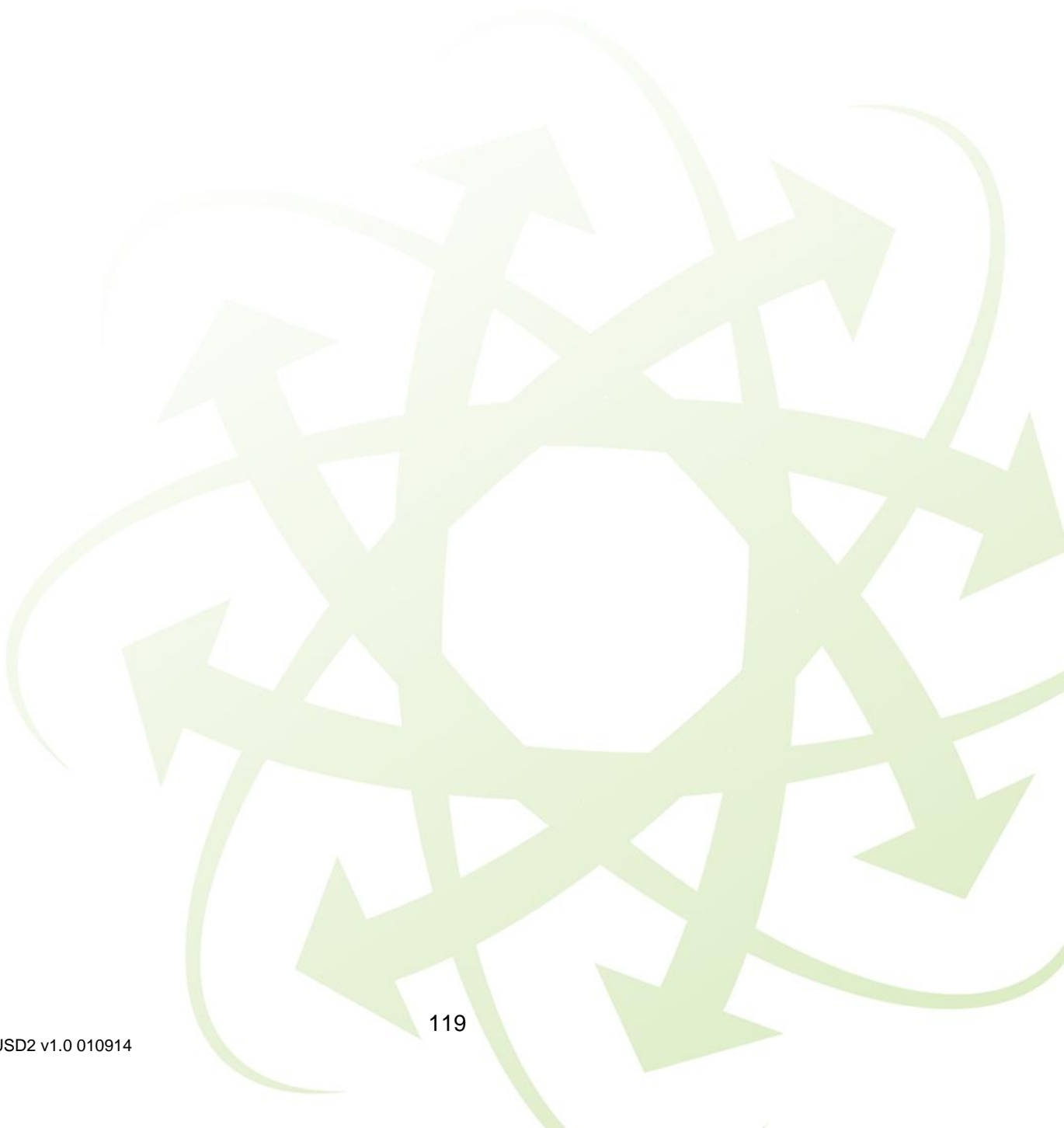
CC38

Deal with incidents through a contact centre

CC38   Deal with incidents through a contact centre

Level: 2

Credit: 7

Unit aims
This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre

There are **three** learning outcomes for this unit. The learner will:

1.   Be able to deal with incidents through a contact centre
2.   Be able to use contact centre communications systems to deploy incident management resources
3.   Understand how to deal with incidents in a contact centre

Guided learning hours
It is recommended that **40** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Assessment guidance
Simulation is not allowed.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
This unit is linked to the national occupational standards CC 38

Support of the unit by a sector or other appropriate body
This unit is endorsed by SkillsCfA the SSC for Contact Centre

Evidence Requirements
Learners must provide a portfolio of evidence which must contain a guided discussion with their assessor.

CC38 Deal with incidents through a contact centre

Learning outcomes and criteria

Outcome 1   Be able to deal with incidents through a contact centre

The learner can:
1   respond to incoming calls in a calm and professional manner
2   maintain control of the conversation
3   record the contact and information in an incident log in accordance with organisational procedures
4   assess and prioritise reported incidents in accordance with organisational procedures
5   pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures
6   provide information, advice and support in response to requests in accordance with organisational procedures
7   escalate incident responses in accordance with organisational procedures

Outcome 2   Be able to use contact centre communications systems to deploy incident management resources

The learner can:
1   communicate with external organisations in accordance with organisational procedures
2   use the most efficient means (voice or data options) to communicate with those dealing with the incident
3   use agreed conventions of wording, style and approach appropriate for different communication media

Outcome 3   Understand how to deal with incidents in a contact centre

The learner can:
1   describe the incident management services offered by the contact centre
2   describe the impact of regulation or legislation on incident management
3   describe the purpose and use of decision trees
4   describe how to determine the appropriate allocation of resources to incidents
5   describe the boundaries of a contact incident that justify actions being escalated to different levels of response
6   describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
7   describe standard wording and codes used by the organisation when dealing with incident management
8   describe the type and extent of resources available for deployment in incident management

HSPW2

Health and safety procedures in the workplace
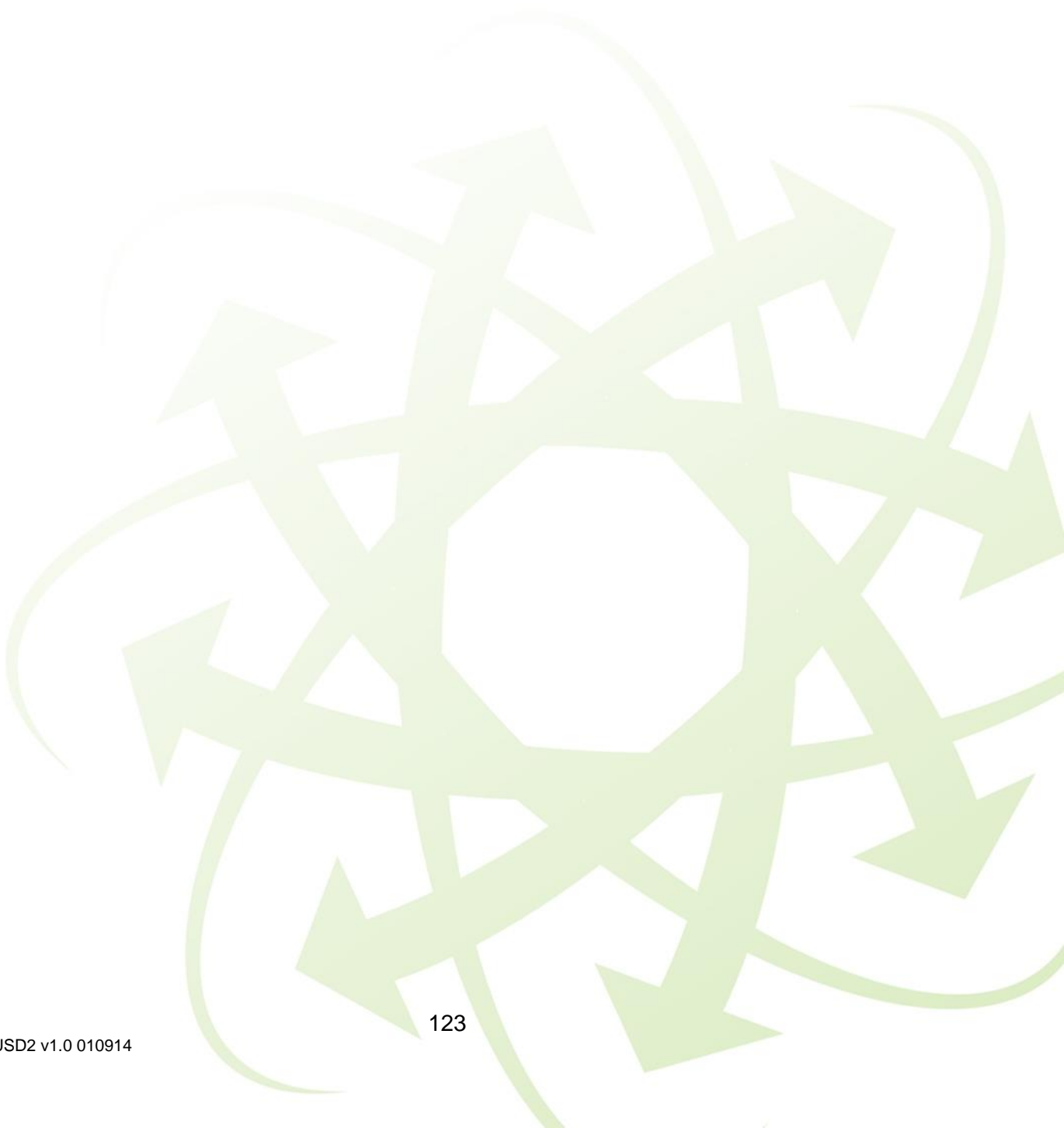
HSPW2   Health and safety procedures in the workplace

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of health and safety procedures in the workplace and to apply this understanding to carry out tasks with regard to health and safety in the workplace

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Know health and safety procedures in the workplace
2.   Be able to carry out tasks with regard to health and safety in the workplace

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

HSPW2   Health and safety procedures in the workplace

Learning outcomes and assessment criteria

Outcome 1   Know health and safety procedures in the workplace

The learner can:
1   define the main responsibilities for health and safety in the workplace of the following:
a)   employers
b)   employees.

2   describe two health and safety laws affecting the workplace.
3   define the importance of following health and safety procedures in the workplace.
4   define the types of information or support available in relation to a specified aspect of health and safety in the workplace

Outcome 2   Be able to carry out tasks with regard to health and safety in the workplace

The learner can:
1   carry out a risk assessment of a specified workplace activity
2   use equipment or tools safely in the workplace
3   describe how to prevent accidents in the workplace
4   assess how own health and safety practices could be improved

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IT201

Bespoke software 2

IT201   Bespoke software 2

Level: 2

Credit value: 3

Unit aims

This unit is about the skills and knowledge needed by an IT User to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1.   Input and combine information using bespoke applications
2.   Use appropriate structures to organise and retrieve information efficiently
3.   Use the functions of the software effectively to process and present information

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance
Bespoke software tools and techniques will be defined as 'intermediate' because:

•   the software tools and functions involved will at times be non-routine or unfamiliar;
•   the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step;
•   the user will take some responsibility for inputting, manipulating and outputting the information.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT201   Bespoke software 2
Learning outcomes and assessment criteria

Outcome 1   Input and combine information using bespoke applications

The learner can:
1   input relevant information accurately so that it is ready for processing
2   select and use appropriate techniques to link and combine information of different forms or from different sources within the software
3   respond appropriately to data entry error messages

Outcome 2   Use appropriate structures to organise and retrieve information efficiently

The learner can:
1   describe what functions to apply to structure and layout information effectively
2   select and use appropriate structures and/or layouts to organise information
3   apply local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3   Use the functions of the software effectively to process and present information

The learner can:
1   select and use appropriate tools and techniques to edit, process and format information
2   check information meets needs, using IT tools and making corrections as necessary
3   select and use appropriate methods to present information

ML2

Develop working relationships with colleagues
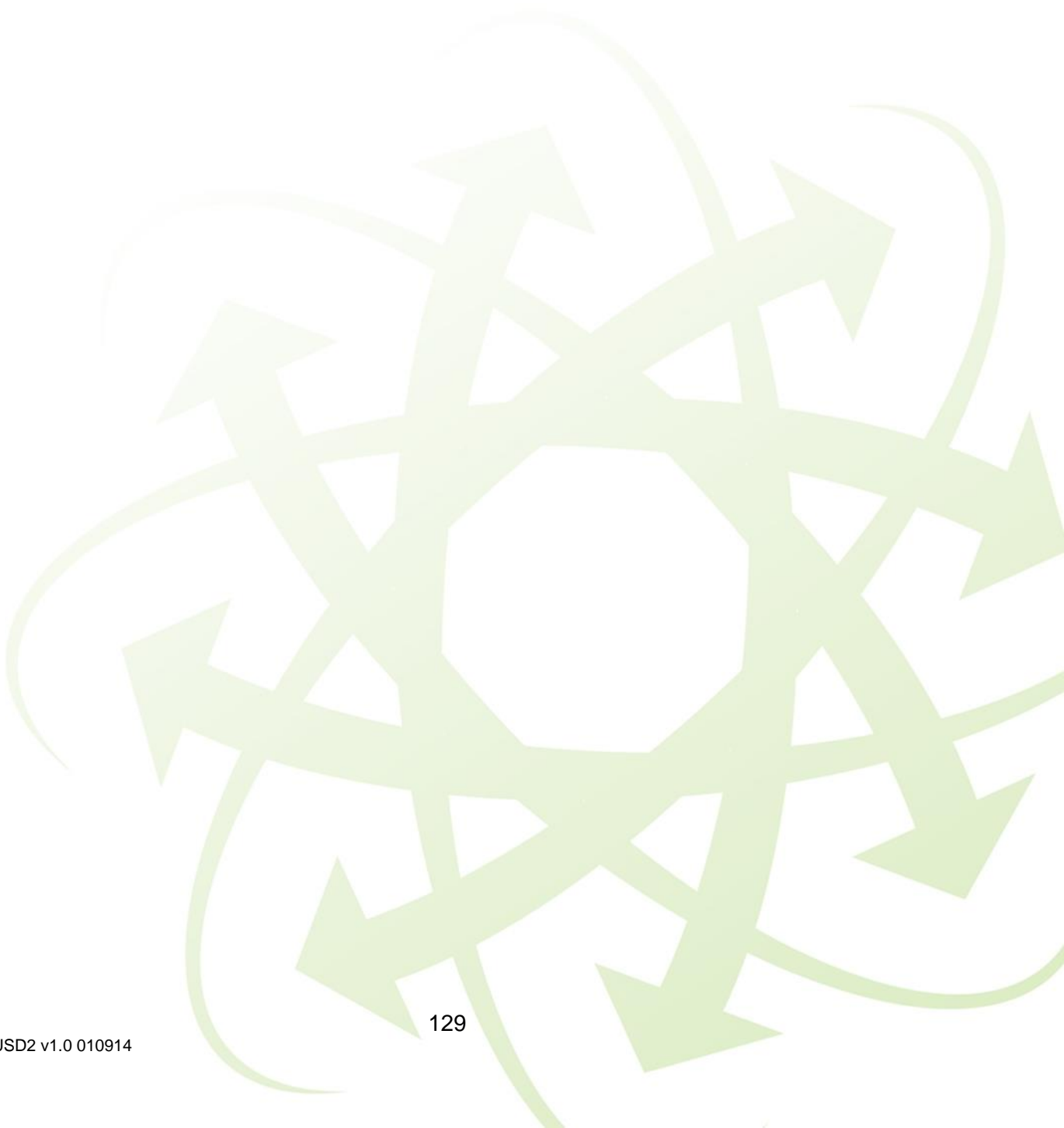
ML2   Develop working relationships with colleagues

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the principles of effective team working and the ability to maintain effective working relationships with colleagues and to collaborate with colleagues to resolve problems

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the principles of effective team working
2.   Be able to maintain effective working relationships with colleagues
3.   Be able to collaborate with colleagues to resolve problems

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Feedback should not be restricted just to that normally given by a team leader or supervisor – it should focus on the interaction between team members.

Conflict management techniques might include:
•   Forcing
•   Win-win – collaborating
•   Compromising
•   Withdrawing
•   Smoothing
•   Include the use of real life examples.

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML2   Develop working relationships with colleagues

Learning outcomes and assessment criteria

Outcome 1   Understand the principles of effective team working

The learner can:
1   outline the benefits of effective team working
2   describe how to give feedback constructively
3   explain conflict management techniques that may be used to resolve team conflicts
4   explain the importance of giving team members the opportunity to discuss work progress and any issues arising
5   explain the importance of warning colleagues of problems and changes that may affect them

Outcome 2   Be able to maintain effective working relationships with colleagues

The learner can:
1   recognise the contribution of colleagues to the achievement of team objectives
2   treat colleagues with respect, fairness and courtesy
3   fulfil agreements made with colleagues
4   provide support and constructive feedback to colleagues

Outcome 3   Be able to collaborate with colleagues to resolve problems

The learner can:
1   take others' viewpoints into account when making decisions
2   take ownership of problems within own level of authority
3   take action to minimise disruption to business activities within their own level of authority
4   resolve problems within their own level of authority and agreed contribution

ML7

Principles of equality and diversity in the workplace
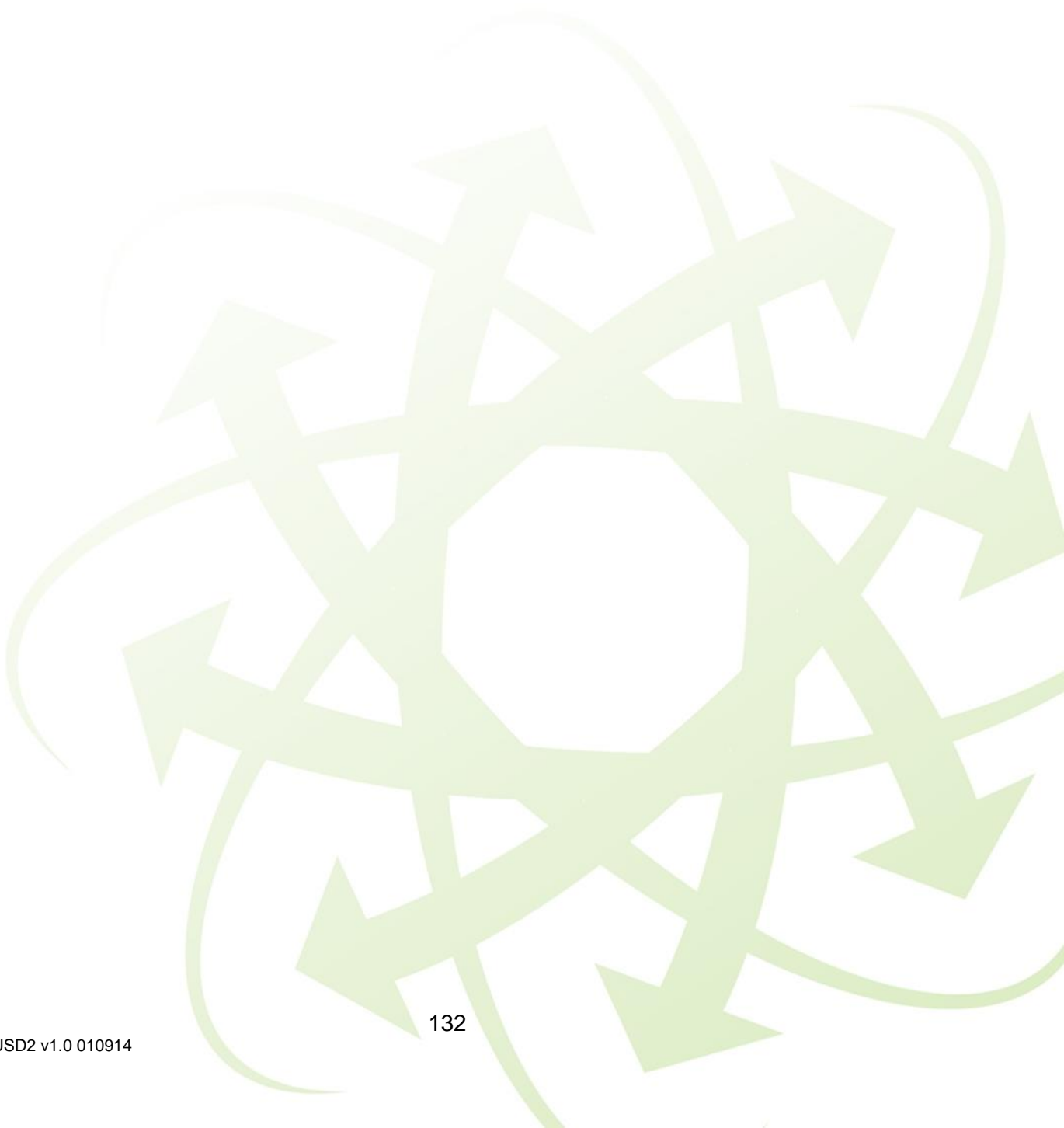
ML7   Principles of equality and diversity in the workplace

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the implications of equality legislation and the organisational standards and expectations for equality and diversity and context in the workplace

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1. Understand the implications of equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace

Guided learning hours
It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Benefits include those relating to the employer, employees and customers

Consequences could include those which are legal, reputational and relating to profits

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML7 Principles of equality and diversity in the workplace

Learning outcomes and assessment criteria

Outcome 1 Understand the implications of equality legislation

The learner can:
1 define the concept 'equality and diversity'
2 describe the legal requirements for equality of opportunity
3 describe the role and powers of organisations responsible for equality
4 explain the benefits of equal opportunities and diversity
5 explain the potential consequences for an organisation of failing to comply with equality legislation

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

The learner can:
1 explain how organisational policies on equality and diversity translate into day to day activity in the workplace
2 describe their own responsibilities for equality and diversity in the workplace
3 describe behaviours that support equality, diversity and inclusion in the workplace

SA207
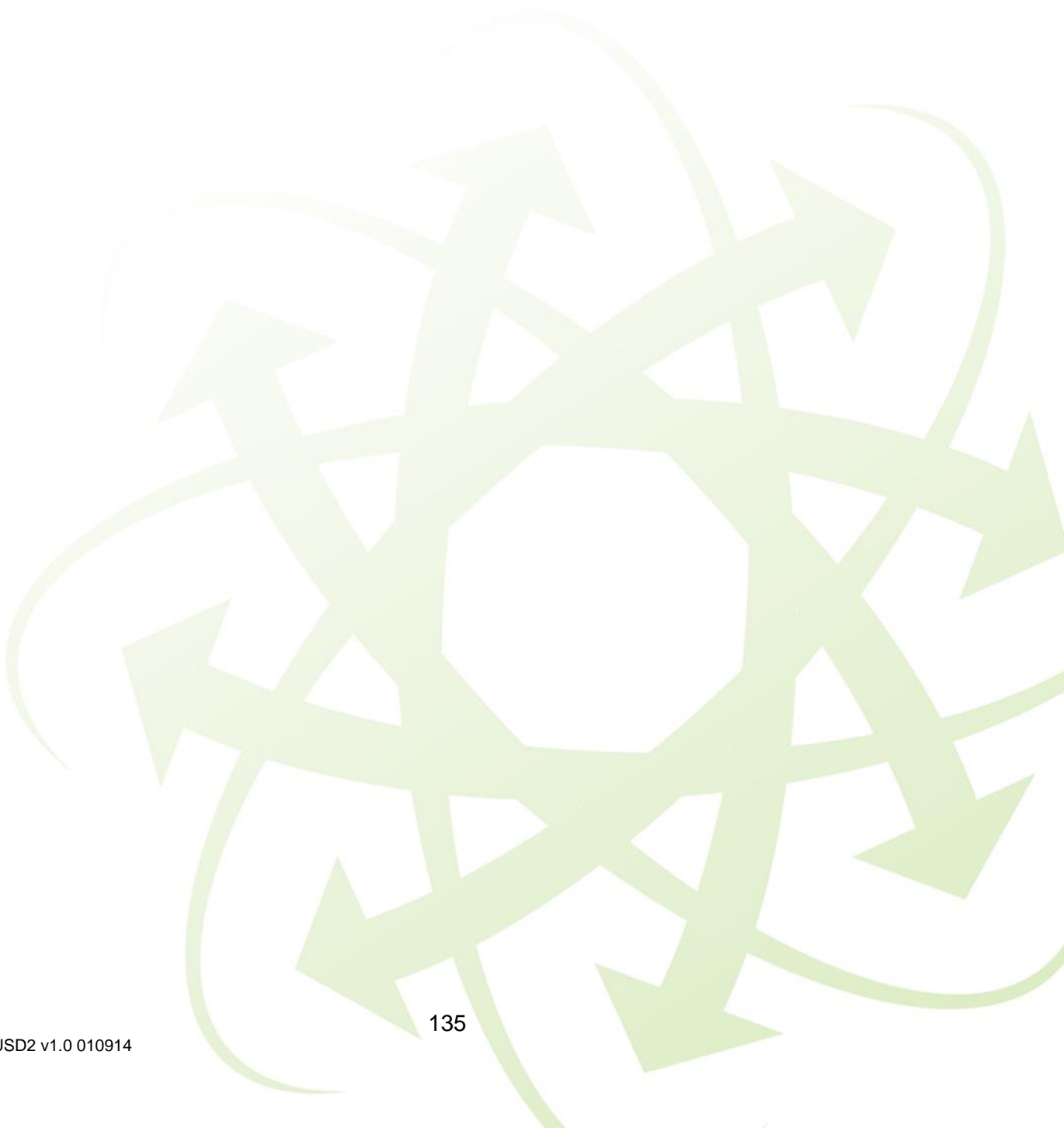
Processing sales orders

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide the skill and knowledge needed to process orders and payments.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1   Understand how to process and follow up sales orders.
2   Be able to process sales orders.
3   Be able to follow up sales order processing.

Guided learning hours
It is recommended that **17** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by CfA, the sector skills council for Sales.

Evidence Requirements
Learners must provide a portfolio of evidence which covers all the learning outcomes and meets all the assessment criteria.

SA207   Processing sales orders
Learning Outcomes and Assessment Criteria

Outcome 1   Understand how to process and follow up sales orders

The learner can:
1. explain the importance of sales order processing
2. describe organisational processes for ordering products and/or services
3. describe different sources of information used to check customer credit
4. describe the different payment methods accepted by sales orientated organisations
5. explain the role of the despatch function
6. describe service standards relating to sales order completion
7. explain the importance of storing information securely

Outcome 2   Be able to process sales orders

The learner can:
1. identify customer sales order requirements
2. check that the credit status of the customer meets organisational standards
3. confirm the availability of products and/or services to the customer
4. ensure that information given to the customer about delivery, timing and price is accurate
5. ensure that the sale is authorised following the organisation's procedures
6. finalise the transaction in accordance with organisational procedures
7. ensure that the customer is aware of the terms and conditions of sale
8. ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders
9. identify who to go to when in need of support with sales order processing problems

Outcome 3   Be able to follow up sales order processing

The learner can:
1. keep the customer informed of the sales order progress and any problems with the sale order
2. advise the customer of current discounts and special offers
3. check all information is stored securely

SA213

Meeting customers' after-sales needs

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SA213 Meeting customers' after sales needs

Level: 2

Credit value: 3

Unit aim
This unit aims to provide the skills of how after-sales service is provided in a way that meets your customer's needs.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1   Be able to investigate customer after sales needs.
2   Be able to handle customers' after sales needs.
3   Be able to review the after sales process.

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by CfA, the sector skills council for Sales.

Evidence Requirements
Learners must provide a portfolio of evidence which covers all the learning outcomes and meets all the assessment criteria.

SA213   Meeting customers' after sales needs

Learning Outcomes and Assessment Criteria

Outcome 1   Be able to investigate customer after sales needs

The learner can:
1   establish the nature of customers' after sales needs
2   communicate with customers in a way that conforms with quality and customer service standards at all times

Outcome 2   Be able to handle customers' after sales needs

The learner can:
1   deal with customers' after sales needs following organisational customer service standards and procedures
2   balance customers' needs with those of the organisation
3   explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority
4   fulfil commitments made to customers in accordance with quality and customer service standards
5   record commitments made to customers

### Outcome 3   Be able to review the after sales process

The learner can:
1   obtain customers' comments on service reliability from customers
2   analyse and report the findings to the relevant person in the organisation
3   make recommendations for improvements to after sales service provision in the light of customer feedback

SAL214

Handling objections and closing sales
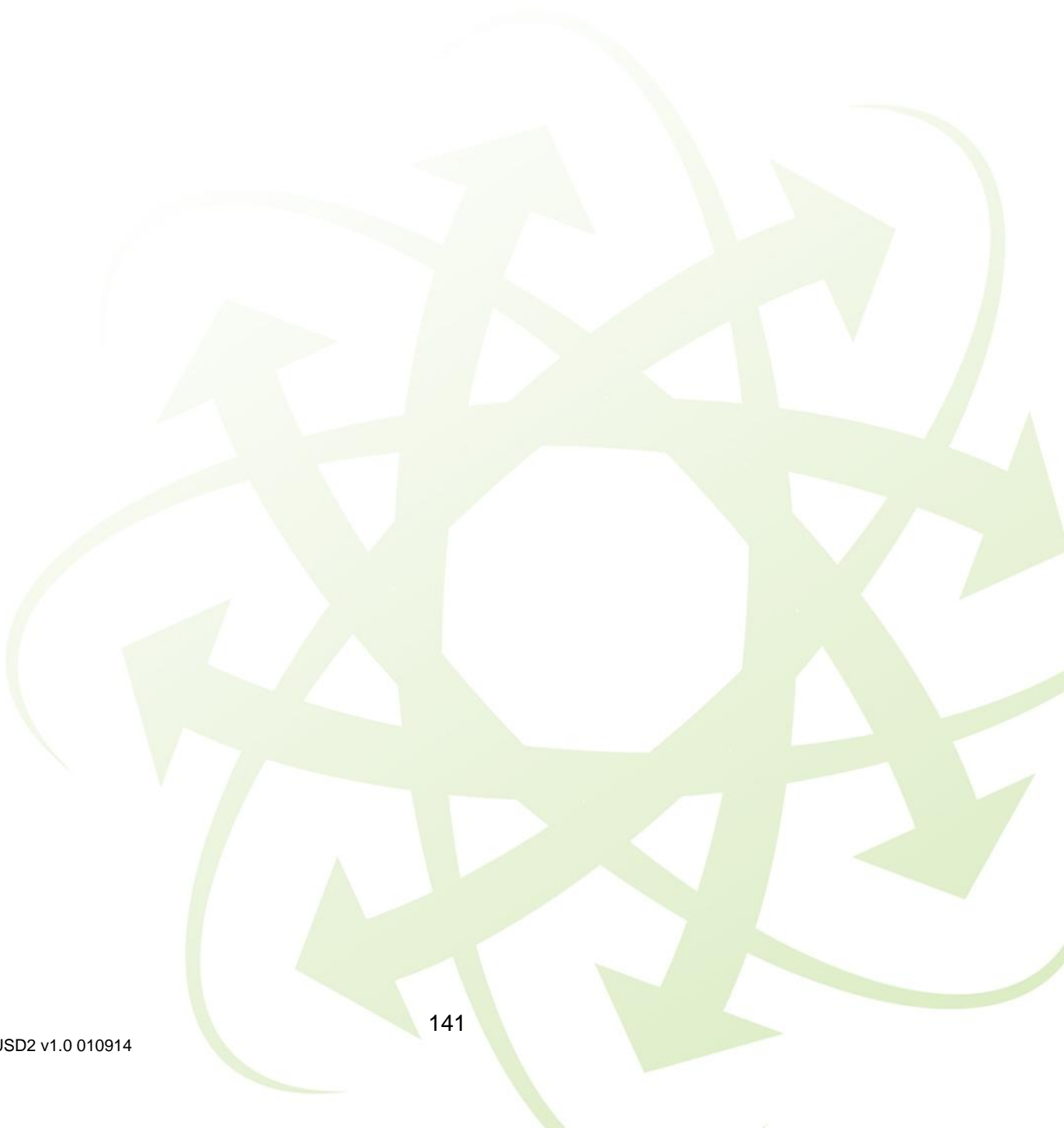
SAL214   Handling objections and closing sales

Level: 2

Credit value: 3

Unit aims
This unit aims to provide the skills and knowledge to enable a learner can handle objections and close a sale.

Learning outcomes
There are **four** learning outcomes to this unit. The learner will:

1.   Understand how to handle sales objections
2.   Understand how to close the sale
3.   Be able to handle objections
4.   Be able to close the sale

Guided learning hours
It is recommended that **22** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
These qualifications are based on Sales NOS 214 which have been developed by CfA, the sector skills council for Sales.

Assessment guidance
Simulation is not allowed.

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for Sales.

Unit assessment
Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

SAL214   Handling objections and closing sales

Learning outcomes and assessment criteria

Outcome 1   Understand how to handle sales objections

The learner can:
1   explain the difference between standard and non-standard sales objections
2   explain how to clarify objections and identify potential sales opportunities from
3   them
4   describe how to use questioning techniques to explore and resolve customer issues
5   explain how to empathise with and reassure the customer
6   explain the difference between hypothetical and real objections
7   explain how knowledge of products and services can be used to answer objections
8   explain how competitor activity may affect the potential sale
9   describe how industry/sector pricing structures may have an impact on sales
10   objections
11   explain the scope of authority and responsibility when dealing with objections
12   state who to go to when in need of support to overcome objections

Outcome 2   Understand how to close the sale

The learner can:
1   explain how to identify verbal and nonverbal buying signals as signs of whether to move towards closing the sale
2   explain how to perform a trial close
3   explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
4   explain potential barriers to closing the sale
5   explain a range of ways to close the sale

Outcome 3   Be able to handle objections

The learner can:
1   clarify the nature and extent of objections
2   explain to the customer the concessions available within the scope of authority
3   follow organisational procedures for dealing with objections
4   promote the benefits of products and/or services to overcome objections
5   use testimonials to overcome objections
6   refer to those in authority when dealing with objections outside the scope of own authority

Outcome 4   Be able to close the sale

The learner can:
1   perform a trial close and ask for the order when objections have been met
2   make use of add-on, up-selling or cross selling opportunities
3   follow organisational procedures for accepting confirmation of an order

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