Handbook

CSA01 – VTCT (Skillsfirst) Level 1 Award in Principles of Customer Service (RQF)

600/0044/2

Version 3

About Skillsfirst

VTCT is a market-leading Awarding, Assessment and End-point Assessment (EPA) Organisation offering vocational and technical qualifications in a range of 'services to people' sectors.

The VTCT group of companies are comprised of three innovative awarding brands: VTCT, iTEC and Skillsfirst. Together they have over 2,500 approved centres in over 40 countries across the world.

The qualifications suite offered by VTCT (Skillsfirst) spans a range of sectors including Childcare, Business Services, Health & Social Care, Recruitment and Social Media.

For more information visit us at www.vtct.org.uk and www.skillsfirst.co.uk, contact our dedicated Customer Support Team via email at customersupport@vtct.org.uk and customerservices@skillsfirst.co.uk or call 0121 270 5100

Contents

1 Qualification at a glance

Qualification title	VTCT (Skillsfirst) Level 1 Award in Principles of Customer Service (RQF)
Qualification number	600/0044/2
Product code	CSA01
Age range	There are no age limits attached to learners undertaking this qualification, unless this is a legal requirement of the process or the environment.
Total Qualification Time (TQT)	55
Guided Learning (GL) hours	47
Assessment	To be awarded this qualification, learners must successfully achieve the following assessments: • Portfolio of evidence
Entry 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.
Legal considerations	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.
Support materials	Support materials can be found on the website (if applicable)

2 Qualification information

2.1 Qualification aim and design

This qualification covers the basic knowledge required to deliver reliable customer service through an understanding of customer expectations and needs. It also provides you with the knowledge to deal effectively with customer queries, problems and complaints.

2.2 Progression opportunities

As well as progression to further qualifications, this qualification also provides a sound base for progression into employment within the customer service industry as well as a tool to progress within different aspects of the business sector. This qualification provides progression to the following qualifications:

- VTCT (Skillsfirst) Level 1 Certificate in Principles of Customer Service (RQF)
- VTCT (Skillsfirst) Level 2 Diploma in Customer Service (RQF) or the
- VTCT (Skillsfirst) Intermediate Apprenticeship in Customer Service (Level 2)

3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 1 Award in Principles of Customer Service (RQF) learners must achieve all mandatory units.

The minimum TQT required to achieve this qualification is **55**.

Product code	Unit title	Level	GLH	Unit reference number
Mandatory units (Group M):				
CSP01	Principles of customer service	1	47	Y/501/4375

4 Centre requirements

4.1 Resources

Centres must possess the physical resources needed to support the delivery of the programme and the assessment of knowledge and skills, which should therefore be of industry standard. Where specific resources are required these have been indicated in individual units.

4.2 SkillsCfA

This handbook provides details from the ICS's assessment strategy, which centres will need to apply in order to assess and quality assure the Level 1 Award in Principles of Customer Service (RQF) and includes:

- occupational expertise 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 ICS website www.instituteofcustomerservice.com

4.3 SkillsCfA and the Institute of Customer Service (ICS)

The Level 1 Award in Principles of Customer Service (RQF) is based on the unit developed by the Institute of Customer Service (ICS) who were the sector skills council during its development. The sector skills council is now SkillsCfA and their contact details are:

SkillsCfA
Unit 110 Linton House
164 - 180 Union Street
London
SE1 0LH
Tel: 0207 091 9620

info@skillscfa.org

4.4 Occupational expertise of those who assess performance, and moderate and verify assessments

Deliverers, assessors and internal verifiers (IVs) are appointed by the recognised centre and approved by Skillsfirst through the external verifier (EV).

4.4.1 Deliverers, Assessors and internal verifiers

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be technically competent in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be at least to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training

While the assessor/verifier (A/V) and the assessor/internal quality assurance (TAQA) units are valued as qualifications for centre staff, they are not currently a requirement for the qualifications.

Centre staff should have verifiable relevant experience and current knowledge of the occupational working area at, or above, the level they are assessing or verifying. This experience and knowledge must be of sufficient depth to be effective and reliable when judging learner competence or verifying assessment processes and decisions. This could be verified by:

- curriculum vitae and references
- possession of a relevant qualification
- corporate membership of a relevant professional institution

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

4.5 Employer Direct Model

Where employers opt for an 'employer direct' model, the qualification requirements for assessors and internal verifiers may be waived. The 'Employer Direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of Skillsfirst and CfA and the approval of the qualification regulators, may choose between:

- achieving the appropriate approved qualifications for assessment/verification

or

- demonstrating that their (the employer's) training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by Skillsfirst as providing the equivalent level of rigour and robustness as achievement of the approved assessment/verification qualification

Each application to use the Employer Direct Model will be considered on an individual organisation and qualification basis and agreed by the qualification regulators, including the sector skills council. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the standards in association with Skillsfirst.

4.6 Continuous professional development (CPD)

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

Centres are expected to support their deliverers, 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.

4.7 Total Qualification Time (TQT)

Each qualification has a Total Qualification Time (TQT) value based on the total number of hours learning required to achieve it. The TQT value reflects the number of supervised learning hours required to achieve the knowledge and assessment requirements, plus the length of time a learner would need to take to achieve the skills and capabilities to be deemed competent. All RQF qualifications are subject to an evaluation process to determine their fitness-for-purpose.

5 Assessment

5.1 Summary of assessment methods

For the VTCT (Skillsfirst) Level 1 Award in Principles of Customer Service (RQF), learners will be required to provide a portfolio of evidence which meets all the assessment criteria within the unit.

5.2 Suggested delivery strategy

Deliverers should familiarise themselves with the structure, content and assessment requirements of the units within the qualification before designing a learning programme. It is suggested that centres design learning programmes that

- best meets the needs and capabilities of their learners and
- satisfies the learning outcomes and assessment criteria of the unit

5.3 Characteristics of assessment guidance

The learner may produce evidence from a range of examples (as outlined below) 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 and 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.

5.4 Types of evidence

Evidence is not required in any pre-set format and may be of many types and from diverse sources.

Examples of types of evidence might include:

- learner statement
- notes
- letter
- e-mail
- annotated or highlighted text
- action plan
- review and tutorial records
- report
- project plan
- diary

- worksheet
- audio/video recorded
- discussion/presentation/interview
- photograph
- assessor observation
- witness statement
- picture
- leaflets
- product
- screen dumps (print screen)

Please note that centres are not restricted to the types of evidence listed above.

5.5 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.

5.6 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.

5.6.1 Simulation

Simulation can be used to assess learners where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to a breach of confidentiality or privacy, health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. It should only be used when performance evidence is unlikely to be generated through normal working practices.

5.6.2 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

5.7 Recognition of prior learning (RPL)

RPL is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a component of a qualification through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning. 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

This evidence will need to be referenced clearly on recording documentation and will need to be appropriately authenticated and validated, perhaps by an employer or expert witness.

Assessment must be valid and reliable to ensure the integrity of the award. The evidence gathered must meet the standards of the qualification or component and the assessment process must be subject to the same quality assurance procedures as any other assessment process.

In summary, evidence submitted to the RPL process must:

- be authentic and prove conclusively that RPL is based on the learner's own work;
- meet the requirements of the current the skills and knowledge requirements and be appropriate to the content of the component or qualification being considered for RPL;
- be sufficient to conclusively prove consistency of learner performance in meeting the skills and knowledge requirements

6 Units

Unit Handbook

CSP01 – Principles of customer service

Unit reference number: Y/501/4375

Level: 1 **Credit value: 6** **Guided Learning (GL) hours: 47**

Unit aim

The aim of this unit is to provide the learner with the skills required to deliver efficient and reliable customer service. They will gain an understanding of customer expectations and needs and will be able to deal effectively with customer queries and complaints.

Learning outcomes

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

LO1 Know how to deliver good customer service

LO2 Know different communication methods

LO3 Know how to provide good customer service in line with organisational procedures

LO4 Know how to effectively deal with customer queries, problems and complaints.

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence and a guide for tutor/trainers can be found in Appendix 1.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the Level 1 N/SVQ in Customer Service.

Support of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Know how to deliver good customer service	1.1 Identify different types of customers
	1.2 Identify different needs of customers
	1.3 State what is meant by customer satisfaction
	1.4 State what is meant by customer expectations

Learning Outcome	Assessment Criteria
LO2 Know different communication methods	2.1 State effective methods of communication to use when dealing with different customers
	2.2 State how to use questions when dealing with different customers
	2.3 Identify positive and negative body language and facial expression
	2.4 State how customers' body language impacts on customer service
	2.5 State how own body language impacts on customer service

Learning Outcome	Assessment Criteria
LO3 Know how to provide good customer service in line with organisational procedures	3.1 State the importance of providing products and services which are 'fit for purpose'
	3.2 State the importance of customer and organisation confidentiality
	3.3 State the limits of own authority

Learning Outcome	Assessment Criteria
LO4 Know how to effectively deal with customer queries, problems and complaints	4.1 State how to deal with customer queries
	4.2 Identify common customer problems and complaints
	4.3 State how to deal with problems and complaints

CSP01 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

7 Appendix 1 – The Guide for Tutors/Trainers

CSP01 – Principles of Customer Service

Outcome 1 – Know how to deliver good customer service
Suggested areas of knowledge:

Customers – internal, external

Customers may have special needs and be able to state what these special needs might be (e.g. hearing impaired, mobility impaired, sight impaired).

Customer satisfaction occurs when a customer is happy with the service provided customer satisfaction will provoke different feelings in different people (e.g. happiness, warmth, respect, feeling valued).

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

Different customers will have different needs and expectations (e.g. meeting timescales, keeping promises, value for money, quality presentation, fir for purpose, reliability, easy to use, friendliness of employees).

Outcome 2 – Know different communication methods
Suggested areas of knowledge:

Different methods of communication (e.g. face-to-face, letter, telephone, fax, e-mail)

A service-deliverer needs to be able to judge customers' expectations by identifying and understanding their needs through the use of well-developed inter-personal skills, such as questioning which enables a service-deliverer to accurately identify customers' needs.

Body language is about interpreting facial expressions, gestures and posture together with the words a customer uses.

The learner should be able to describe the potential impact of a range of body language variations displayed by the customer (e.g. aggression, pointing, hands on hips

A service deliverer also conveys messages through their own body language (e.g. standing very close to a customer versus standing at a distance, folding arms versus open arms, giving lots of eye contact, giving no eye contact, pointing fingers, frowning versus smiling).

Outcome 3 – Know how to provide good customer service in line with organisational procedures

Suggested areas of knowledge:

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. They should also understand how customer expectations are formed e.g. through what customers hear and see, what they read and what 'messages' an organisation sends (i.e. via its reputation and brand), what actually happens to them when dealing now and in the past with an organisation

The need to protect customers and their organisation's interests when working with customer service records. They should understand any loyalty and goodwill which exists between customers and the organisation will be lost if confidentiality is breached.

Many organisations have recognised systems and procedures for solving and dealing with customer problems and complaints depending on the limit of authority to make decisions.

Outcome 4 – Know how to effectively deal with customer queries, problems and complaints

Suggested areas of knowledge:

It is always vital to communicate in a clear, polite and confident way

A variety of common customer problems and complaints (e.g. faulty goods, poor quality, incorrect stock, failure to return calls, failure to meet deadlines, poor attitude of staff).

Judging a customer's expectations by identifying and understanding their needs, learners should be able to explain this may often mean they have to adapt their own behaviour and how they communicate with the customer.

CSA01 Document History

Version	Issue Date	Changes	Role
v3	03/02/2023	Formatting and re-branding. No content amendment.	Data Administrator