



Handbook

CUSD3 – VTCT (Skillsfirst) Level 3 Diploma in Customer Service (RQF)

601/3521/9

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

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1 Qualification at a glance

Qualification title	VTCT (Skillsfirst) Level 3 Diploma in Customer Service (RQF)
Qualification number	601/3521/9
Product code	CUSD3
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.
Credits	55
Total Qualification Time (TQT)	550
Guided Learning (GL) hours	289
Assessment	<p>To be awarded this qualification, learners must successfully achieve the following assessments:</p> <ul style="list-style-type: none">• Portfolio of evidence• Skills-based assessment (if applicable)
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.
Support materials	Support materials can be found on the website (if applicable)

2 Qualification information

2.1 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 3 Advanced Apprenticeship in Customer Service.

2.2 Progression opportunities

On completion of the Level 3 Diploma in Customer Service (RQF), learners may progress into employment or onto the following Skillsfirst qualifications:

- Level 3 Diploma in Management (RQF)
- Level 3 Diploma in Team Management (RQF)
- Level 3 Diploma in Business Administration (RQF)

or similar higher level qualifications.

3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 3 Diploma in Customer Service (RQF) learners must achieve all mandatory units. All **55** credits must be achieved.

- All **31** credits must be achieved from the mandatory Group M
- A minimum of **15** credits must be achieved from Group A
- A maximum of **9** credits must be achieved from Group B

A minimum of **40** credits must be at Level 3 or above.

The minimum TQT required to achieve this qualification is **550**.

Product code	Unit title	Level	Credit	Unit reference number
Mandatory units (Group M): 31 Credits				
BUS59	Principles of business	3	10	D/506/1942
CUS25	Organise and deliver customer service	3	5	L/506/2152
CUS26	Understand the customer service environment	3	5	Y/506/2152
CUS27	Understand customers and customer retention	3	4	J/506/2910
CUS30	Resolve customers' problems	3	4	K/506/2169
ML9	Manage personal and professional development	3	3	T/506/2952

Product code	Unit title	Level	Credit	Unit reference number
Optional units (Group A): A minimum of 15 credits must be achieved from Group A				
CUS5	Communicate verbally with customers	2	3	D/506/2119
CUS6	Communicate with customers in writing	2	3	T/506/2126
CUS12	Promote additional products and/or services to customers	2	2	L/506/2133
CUS14	Exceed customer expectations	2	3	Y/506/2135
CUS15	Deliver customer service whilst working on customer's premises	2	4	T/506/2143
CUS18	Deliver customer service to challenging customers	2	3	F/506/2159
CUS19	Develop customer relationships	2	3	Y/506/2149
CUS20	Support customer service improvements	2	3	T/506/2160
CUS21	Support customers through real-time online customer service	2	3	A/506/2161
CUS22	Support customers using self-service equipment	2	3	H/506/2977
CUS23	Use social media to deliver customer service	2	3	J/506/2163
CUS24	Provide post transaction customer service	2	5	K/506/2978
CUS28	Develop resources to support consistency of customer service delivery	3	5	Y/506/2166
CUS29	Use service partnerships to deliver customer service	3	3	D/506/2167
CUS31	Resolve customers' complaints	3	4	R/506/2151
CUS32	Gather, analyse and interpret customer feedback	3	5	D/506/2170
CUS33	Monitor the quality of customer service interactions	3	5	K/506/2172
CUS35	Champion customer service	4	4	D/506/2153
CUS38	Build and maintain effective customer relations	4	6	R/506/2179
CUS40	Manage a customer service award programme	4	4	L/506/2181
CUS41	Manage the use of technology to improve customer service	4	4	Y/506/2183
CUS42	Develop a social media strategy for customer service	4	5	D/506/2962

Product code	Unit title	Level	Credit	Unit reference number
Optional units (Group B): A maximum of 9 credits must be achieved from Group B				
BUS13	Manage diary systems	2	2	L/506/1807
BUS19	Provide reception services	2	3	H/506/1814
BUS27	Contribute to the organisation of an event	2	3	L/506/1869
BUS35	Buddy a colleague to develop their skills	2	3	M/506/1895
BUS39	Employee rights and responsibilities	3	2	L/506/1905
BUS42	Negotiate in a business environment	3	4	H/506/1912
CC20	Lead direct sales activities in a contact centre team	3	4	D/503/0397
CC39	Manage incidents referred to a contact centre	3	6	K/503/0418
IT301	Bespoke Software	3	4	J/502/4397
ML10	Promote equality, diversity and inclusion in the workplace	3	3	T/506/1820
ML11	Manage team performance	3	4	A/506/1821
ML12	Manage individuals' performance	3	4	J/506/1921
ML21	Collaborate with other departments	2	3	M/506/1931
SA207	Processing sales orders	3	2	M/502/8587
SA301	Negotiating, handling objections and closing sales	3	4	F/502/8612
SA302	Obtaining and analysing sales related information	3	4	R/502/8615
SA304	Buyer behaviours in sales situations	2	3	K/502/8622

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

The Level 3 Diploma in Customer Service (RQF) is based on the units developed by SkillsCfA who are the sector skills council for customer service. Their contact details are:

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

info@skillsca.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 3 Diploma in Customer Service (RQF) 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.skillsca.org

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

4.3.1 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

4.3.2 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 IQA . 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.

4.4 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

4.5 Continuous professional development (CPD)

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.

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

5.2 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.

5.3 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.

5.3.1 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.

5.3.2 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

5.4 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.

5.4.1 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.

5.4.2 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.

5.5 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

BUS59 – Principles of Business

Unit reference number: D/506/1942

Level: 3

Credit value: 10

Guided Learning (GL) hours: 74

Unit aim

The aim of this unit is to provide learners with an understanding of business markets, innovation and growth, financial management and budgeting. It also provides learners with an understanding of sales and marketing

Learning outcomes

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

LO1 Understand business markets

LO2 Understand business innovation and growth

LO3 Understand financial management

LO4 Understand business budgeting

LO5 Understand sales and marketing

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Business markets are also known as business-to-business (B2B) markets or industrial marketing. They are markets in which goods/services are sold between companies/organisations as opposed to consumer markets.

The common features of **models of business** innovation is that they extend product life, conserve resources and prevent materials from becoming waste.

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand business markets	1.1 Explain the characteristics of different business markets
	1.2 Explain the nature of interactions between businesses within a market
	1.3 Explain how an organisation's goals may be shaped by the market which it operates
	1.4 Describe the legal obligations of a business

Learning Outcome	Assessment Criteria
LO2 Understand business innovation and growth	2.1 Define business innovation
	2.2 Explain the uses of models of business innovation
	2.3 Identify sources of support and guidance for business innovation
	2.4 Explain the process of product or service development
	2.5 Explain the benefits, risks and implications associated with innovation

Learning Outcome	Assessment Criteria
LO3 Understand financial management	3.1 Explain the importance of financial viability for an organisation
	3.2 Explain the consequences of poor financial management
	3.3 Explain different financial terminology

Learning Outcome	Assessment Criteria
LO4 Understand business budgeting	4.1 Explain the uses of a budget
	4.2 Explain how to manage a budget

Learning Outcome	Assessment Criteria
LO5 Understand sales and marketing	5.1 Explain the principles of marketing
	5.2 Explain a sales process
	5.3 Explain the features and uses of market research
	5.4 Explain the value of a brand to an organisation
	5.5 Explain the relationship between sales and marketing

BUS59 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

CUS25 – Organise and deliver customer service

Unit reference number: L/506/2150

Level: 3

Credit value: 5

Guided Learning (GL) hours: 27

Unit aim

The aim of this unit is to provide learners with an understanding of how to organise customer service delivery. It will also provide learners with an ability to plan and deliver excellent customer service.

Learning outcomes

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

LO1 Understand how to organise customer service delivery

LO2 Be able to plan the delivery of customer service

LO3 Be able to deliver customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Methods of promoting products and/or services could include but not be limited to: advertising, e.g., TV, online, press, flyers, in store messaging, social media campaigns

Segmentation – the technique used to enable a business to better target its products at the right customers

Customer journey e.g. points of transaction, points of contact and response mechanisms for each stage of the journey

Systems and structures – the procedures, people, and resources needed to deliver customer service.

Resources can include but are not exclusive to staff, promotional materials and equipment

Service failure - a dissatisfactory service experience

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to organise customer service delivery	1.1 Explain how different methods of promoting products and/or services impact on customer service delivery
	1.2 Explain who should be involved in the organisation of customer service delivery
	1.3 Explain the importance of differentiating between customers' wants, needs and expectations
	1.4 Explain different ways of segmenting customer groups
	1.5 Explain how customer segmentation is used in organising customer service delivery
	1.6 Explain how to analyse the "customer journey"

Learning Outcome	Assessment Criteria
LO2 Be able to plan the delivery of customer service	2.1 Identify customers' needs and expectations
	2.2 Map the "customer journey"
	2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service
	2.4 Prepare the resources needed to deliver products and/or services to different types of customers
	2.5 Plan how to deal with unexpected additional workloads
	2.6 Allocate priorities to address points of service failure

Learning Outcome	Assessment Criteria
LO3 Be able to deliver customer service	3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives
	3.2 Agree realistic and achievable actions with customers
	3.3 Identify areas for improvement in their own customer service delivery
	3.4 Adapt their own customer service delivery to meet customers' changing expectations

CUS25 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS26 – Understand the customer service environment

Unit reference number: Y/506/2152

Level: 3

Credit value: 5

Guided Learning (GL) hours: 40

Unit aim

The aim of this unit is to provide learners with an understanding of the concepts and practices underpinning customer service delivery and the implications of legislation on that delivery. It will also provide learners with an understanding of the structure of customer service and the relationship between customer service and a brand.

Learning outcomes

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

LO1 Understand the concepts and practices underpinning customer service delivery

LO2 Understand the relationship between customer service and a brand

LO3 Understand the structure of customer service

LO4 Understand the implications of legislation on customer service delivery

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Competitive is as good as or better than others of a comparable nature

Service failure is where the customer service standard and/or customer expectations have not been met

Service profit chain is the relationships between profitability, customer loyalty, and employee satisfaction, loyalty, and productivity

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

Consumer-related legislation may include:

- Sales of Goods Act 1979
- Consumer Protection Act 1987

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the concepts and practices underpinning customer service delivery	1.1 Explain the value of customer service as a competitive tool
	1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service
	1.3 Describe techniques used to identify service failures
	1.4 Explain the concept and importance of the service profit chain
	1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service

Learning Outcome	Assessment Criteria
LO2 Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to customers and to an organisation
	2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services
	2.3 Explain the potential impact of good and poor customer service on a brand

Learning Outcome	Assessment Criteria
LO3 Understand the structure of customer service	3.1 Explain the features of different customer service models and customer service standards
	3.2 Explain the relationship between customer service and operational areas of an organisation
	3.3 Explain the relationship between customer service and continuous improvement processes
	3.4 Explain the costs and benefits of customer service to an organisation
	3.5 Explain the impact of organisational values on how customers create their expectations
	3.6 Explain how organisational values impact on meeting customer expectations

Learning Outcome	Assessment Criteria
LO4 Understand the implications of legislation on customer service delivery	4.1 Explain the implications of consumer-related legislation on customer service delivery
	4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

CUS26 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS27 – Understand customers and customer retention

Unit reference number: J/506/2910

Level: 3

Credit value: 4

Guided Learning (GL) hours: 35

Unit aim

The aim of this unit is to provide learners with an understanding of Customer Relationship Management (CRM), customer retention and the measurement of customer satisfaction.

Learning outcomes

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

LO1 Understand Customer Relationship Management (CRM)

LO2 Understand customer retention

LO3 Understand the measurement of customer satisfaction

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Segmenting and characterising customers can be based on a range of factors, including:

- Age
- Gender
- Employment status
- Marriage status
- Home ownership

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

Performance data could include but not be exclusive to:

- Number of complaints
- Number of returns
- Sales targets

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

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for Business Administration.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand Customer Relationship Management (CRM)	1.1 Explain the concept of the “customer experience”
	1.2 Explain different methods of segmenting and characterising customers
	1.3 Explain the purpose and scope of CRM
	1.4 Describe the features of an effective CRM system
	1.5 Explain the uses of CRM data in customer service delivery

Learning Outcome	Assessment Criteria
LO2 Understand customer retention	2.1 Explain the term customer retention
	2.2 Explain the benefits of customer retention to an organisation
	2.3 Explain the factors that influence customer retention
	2.4 Describe techniques used to attract and retain customers
	2.5 Explain how to assess the extent of customer loyalty
	2.6 Explain the factors involved in customer recovery

Learning Outcome	Assessment Criteria
LO3 Understand the measurement of customer satisfaction	3.1 Describe techniques used to analyse performance data
	3.2 Explain the factors to be taken into account in setting performance targets and objectives
	3.3 Explain the features and uses of a range of techniques to measure customer satisfaction

CUS27 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS30 – Resolve customers' problems

Unit reference number: K/506/2169

Level: 3

Credit value: 4

Guided Learning (GL) hours: 19

Unit aim

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

Learning outcomes

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

LO1 Understand the monitoring and resolution of customers' problems

LO2 Be able to deal with customers' problems

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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 exclusive to,

- 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 Management.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the monitoring and resolution of customers' problems	1.1 Assess the suitability of a range of techniques for monitoring customer problems
	1.2 Explain how to use the resolution of customers' problems to improve products and/or services
	1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance
	1.4 Explain the features of negotiating techniques used to resolve customers' problems

Learning Outcome	Assessment Criteria
LO2 Be able to deal with customers' problems	2.1 Confirm the nature and cause of customers' problems
	2.2 Explain when customers' problems should be treated as complaints
	2.3 Explain the benefits to customers and the organisation of the options available to solve problems
	2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems
	2.5 Explain to customers the options for resolving their problems
	2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority
	2.7 Inform colleagues of the nature of problems and actions taken
	2.8 Evaluate the effectiveness of the resolution of customers' problems
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

CUS30 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualification Administrator

Unit Handbook

ML9 – Manage personal and professional development

Unit reference number: T/506/2952

Level: 3

Credit value: 3

Guided Learning (GL) hours: 12

Unit aim

The aim of this unit is to provide learners with an ability to identify personal and professional development requirements and use these to fulfil a personal and professional development plan. It will also provide learners with an ability to maintain the relevance of a personal and professional development plan.

Learning outcomes

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

LO1 Be able to identify personal and professional development requirements

LO2 Be able to fulfil a personal and professional development plan

LO3 Be able to maintain the relevance of a personal and professional development plan

Unit content

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.

Assessment guidance

Trends and developments may include, but are not limited to:

- Organisational
- Vocational – sector driven
- Governmental
- Legal/Regulatory
- Technological
- Scientific

Benefits may include, but are not limited to:

- Promotion prospects
- Improved knowledge and skills
- Use of new skills
- Opportunity to increase work responsibilities/salary

A **skills gap analysis** is a tool used to identify the difference between a current state and a future goal state within a business.

SMART – (Specific, Measurable, Achievable, Realistic, Time-framed)

Sources may include, but are not limited to:

- Management reviews
- Feedback reports from other internal departments
- External customer feedback reporting

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity
	1.2 Identify trends and developments that influence the need for professional development
	1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation

Learning Outcome	Assessment Criteria
LO2 Be able to fulfil a personal and professional development plan	2.1 Evaluate the benefits of personal and professional development
	2.2 Explain the basis on which types of development actions are selected
	2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis
	2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives
	2.5 Execute the plan within the agreed budget and timescale
	2.6 Take advantage of development opportunities made available by professional networks or professional bodies

Learning Outcome	Assessment Criteria
LO3 Be able to maintain the relevance of a personal and professional development plan	3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
	3.2 Obtain feedback on performance from a range of valid sources
	3.3 Review progress toward personal and professional objectives
	3.4 Amend the personal and professional development plan in the light of feedback received from others

ML9 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

CUS5 – Communicate verbally with customer

Unit reference number: D/506/2119

Level: 2

Credit value: 3

Guided Learning (GL) hours: 14

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:

LO1 Understand how to communicate verbally with customers

LO2 Be able to use customer service language to communicate with customers

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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 exclusive 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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to communicate verbally with customers	1.1 Explain the importance of effective communication in customer service
	1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
	1.3 Explain why “customer service language” is used
	1.4 Describe different questioning techniques that can be used when communicating with customers
	1.5 Describe verbal and non-verbal signals that show how a customer may be feeling
	1.6 Describe the types of information needed when communicating verbally with customers

Learning Outcome	Assessment Criteria
LO2 Be able to use customer service language to communicate with customers	2.1 Identify customers’ wants and priorities
	2.2 Listen “actively” to what customers are saying
	2.3 Communicate clearly, concisely and professionally with customers
	2.4 Use a tone of voice and expression that reinforces messages when communicating with customers
	2.5 Use language that reinforces empathy with customers
	2.6 Adapt their response in accordance with customers’ changing behaviour
	2.7 Provide information and advice that meets customers’ needs
	2.8 Maintain organisational standards of behaviour and communication when interacting with customers
	2.9 Check that customers have understood what has been communicated
	2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

CUS5 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS6 – Communicate with customers in writing

Unit reference number: T/506/2126

Level: 2

Credit value: 3

Guided Learning (GL) hours: 20

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:

LO1 Understand how to communicate with customers in writing

LO2 Be able to plan written communications to customers

LO3 Be able to communicate with customers in writing

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes
	1.2 Describe practices for producing different forms of written communications
	1.3 Describe the potential benefits and limitations associated with communicating with customers in writing
	1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing

Learning Outcome	Assessment Criteria
LO2 Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication
	2.2 Gather the information needed to draft the communication
	2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer

Learning Outcome	Assessment Criteria
LO3 Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone
	3.2 Use language that is clear and concise, adapting it to meet identified customer needs
	3.3 Record decisions and actions taken and the reasons for them
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

CUS6 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS12 – Promote additional products and/or services to customers

Unit reference number: L/506/2133

Level: 2

Credit value: 2

Guided Learning (GL) hours: 14

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:

LO1 Understand the promotion of additional products and/or services to customers

LO2 Be able to promote additional products and/or services to customers

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services
	1.2 Explain the importance of keeping product/service knowledge up to date
	1.3 Explain how to match products and/or services to customer needs
	1.4 Describe techniques to promote additional products and/or services

Learning Outcome	Assessment Criteria
LO2 Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience
	2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers
	2.3 Provide information to customers that will help them to decide whether to select additional products and/or services
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

CUS12 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS14 – Exceed customer expectations

Unit reference number: Y/506/2135

Level: 2

Credit value: 3

Guided Learning (GL) hours: 15

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:

LO1 Understand how to exceed customer expectations

LO2 Be able to exceed customer expectations

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

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 - this will depend on the organisation you are employed by but could include, for example:

- 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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive
	1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer
	1.3 Explain the types of actions that customers are likely to perceive as adding value
	1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer

Learning Outcome	Assessment Criteria
LO2 Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer
	2.2 Explain the service offer clearly and concisely to customers
	2.3 Identify options that offer added value without affecting other customers adversely
	2.4 Make offers to customers within their own authority levels
	2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
	2.6 Record agreements made and actions taken

CUS14 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS15 – Deliver customer service whilst working on customers' premises

Unit reference number: T/506/2143

Level: 2

Credit value: 4

Guided Learning (GL) hours: 20

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:

LO1 Understand how to deliver customer service whilst working on customers' premises

LO2 Be able to deliver customer service whilst working on customers' premises

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Risks are situations or hazards that could cause 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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit
	1.2 Explain the importance of being positive about the product and/or service
	1.3 Explain organisational standards of presentation, behaviour and communication
	1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
	1.5 Explain how to identify possible risks relating to the work to be carried out
	1.6 Explain the way in which legislation affects the work to be carried out

Learning Outcome	Assessment Criteria
LO2 Be able to deliver customer service whilst working on customers' premises	2.1 Identify themselves to customers
	2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises
	2.3 Confirm with customers the nature of work to be carried out on their premises
	2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed
	2.5 Treat customers, their premises and property with consideration
	2.6 Confirm that the customer is satisfied with the outcome
	2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises

CUS15 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS18 – Deliver customer service to challenging customers

Unit reference number: F/506/2159

Level: 2

Credit value: 3

Guided Learning (GL) hours: 16

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:

LO1 Understand the delivery of customer service to challenging customers

LO2 Be able to deal with challenging customers

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment
	1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers
	1.3 Explain behaviours that make it challenging to deal with customers
	1.4 Explain the difference between assertive and aggressive behaviour
	1.5 Describe techniques to deal with customers' challenging behaviour
	1.6 Explain their own levels of authority for agreeing actions outside the service offer
	1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters

Learning Outcome	Assessment Criteria
LO2 Be able to deal with challenging customers	2.1 Identify the signs that indicate that a customer is challenging
	2.2 Express understanding of customers' point of view without admitting liability
	2.3 Explain to customers the limits of the service they can offer
	2.4 Explain to customers the reasons for an organisation's position and policy
	2.5 Agree a way forward that balances customer satisfaction and organisational needs
	2.6 Obtain help from colleagues when options for action are beyond their level of authority
	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

CUS18 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS19 – Develop customer relationships

Unit reference number: Y/506/2149

Level: 2

Credit value: 3

Guided Learning (GL) hours: 18

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:

LO1 Understand how to develop customer relationships

LO2 Be able to develop relationships with customers

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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

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

Others may include colleagues, supervisors and managers

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers
	1.2 Explain the value of customer loyalty and retention
	1.3 Explain how customers' expectations may change over time
	1.4 Explain the use of customer feedback as a means of developing customer relationships
	1.5 Explain the limits of their own authority to make alternative service offers to customers
	1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations
	1.7 Explain the importance of regular communication in the development of both internal and external customer relationships

Learning Outcome	Assessment Criteria
LO2 Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations
	2.2 Identify new ways of helping customers based on their feedback
	2.3 Share feedback from customers with others
	2.4 Identify added value that the organisation could offer customers
	2.5 Bring to customers' attention products or services that may interest them

CUS19 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS20 – Support customer service improvements

Unit reference number: T/506/2160

Level: 2

Credit value: 3

Guided Learning (GL) hours: 12

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:

LO1 Understand how to support customer service improvements

LO2 Be able to identify the potential for improvements to customer service

LO3 Be able to support the implementation of improvements to customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to support customer service improvements	1.1 Describe different sources of information that may help identify ways of improving customer service
	1.2 Describe the constraints on suggesting improvements to customer service
	1.3 Explain the limits of their own authority in implementing improvements

Learning Outcome	Assessment Criteria
LO2 Be able to identify the potential for improvements to customer service	2.1 Use information from a range of sources to understand the customer experience
	2.2 Identify potential areas where customer service could be improved from an analysis of information
	2.3 Make recommendations for improvement that are based on evidence from analysed information

Learning Outcome	Assessment Criteria
LO3 Be able to support the implementation of improvements to customer service	3.1 Implement agreed improvements within the limits of their own authority
	3.2 Inform customers of improvements to customer service
	3.3 Identify the impact of improvements to customer service and feedback to relevant people

CUS20 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS21 – Support customers through real-time online customer service

Unit reference number: A/506/2161

Level: 2

Credit value: 3

Guided Learning (GL) hours: 15

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:

LO1 Understand how to support customers through real-time online customer service

LO2 Be able to establish the customer service support needed by customers

LO3 Be able to support online customer service in real-time

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Online customer service systems could refer 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.

Evidence requirements

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to support customers through real-time online customer service	1.1 Explain how an organisation's online customer service system works
	1.2 Explain how to navigate their own customer service site
	1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services
	1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems

Learning Outcome	Assessment Criteria
LO2 Be able to establish the customer service support needed by customers	2.1 Identify customers' familiarity with the site
	2.2 Identify the difficulties faced by customers when navigating websites
	2.3 Identify the support for customers that will meet their needs

Learning Outcome	Assessment Criteria
LO3 Be able to support online customer service in real-time	3.1 Step through screen sequences while the customer operates the system
	3.2 Communicate with customers in terms they can understand
	3.3 Inform customers of what is happening and why certain steps are required
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

CUS21 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS22 – Support customers using self-service equipment

Unit reference number: H/506/2977

Level: 2

Credit value: 3

Guided Learning (GL) hours: 18

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:

LO1 Understand how to support customers using self-service equipment

LO2 Be able to identify the help needed by customers using self-service equipment

LO3 Be able to help customers to use self-service equipment

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to support customers using self-service equipment	1.1 Explain how the self-service equipment works
	1.2 Describe problems that are commonly encountered by customers when using self-service equipment
	1.3 Explain demonstration techniques to use when supporting customers using self-service equipment
	1.4 Explain organisational procedures for the use of equipment and fault reporting

Learning Outcome	Assessment Criteria
LO2 Be able to identify the help needed by customers using self-service equipment	2.1 Identify signs that show when a customer is having difficulty with the self-service equipment
	2.2 Identify a style and level of intervention that meets customers' needs

Learning Outcome	Assessment Criteria
LO3 Be able to help customers to use self-service equipment	3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment
	3.2 Use staff override functions to enable self-service equipment to be used by customers
	3.3 Explain to customers how to use the equipment and complete the transaction
	3.4 Report equipment-related errors and issues to the right person

CUS22 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS23 – Use social media to deliver customer service

Unit reference number: J/506/2163

Level: 2

Credit value: 3

Guided Learning (GL) hours: 18

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:

LO1 Understand social media in a business environment

LO2 Be able to deal with customers using social media

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand social media in a business environment	1.1 Explain how different social media platforms can be used for customer service
	1.2 Describe different audience groups for a range of social media platforms
	1.3 Explain the importance of monitoring customer posts in social media networks
	1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes
	1.5 Explain the etiquette of communication within different social media platforms
	1.6 Explain the importance of security settings and how they are used on different social media platforms
	1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media

Learning Outcome	Assessment Criteria
LO2 Be able to deal with customers using social media	2.1 Monitor social media to identify customer questions, requests and comments
	2.2 Make responses that are appropriate to posts made by customers on social media networks
	2.3 Take action to ensure that customers are satisfied before closing dialogue
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

CUS23 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS24 – Provide post-transaction customer service

Unit reference number: K/506/2978

Level: 2

Credit value: 5

Guided Learning (GL) hours: 22

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:

LO1 Understand post-transaction customer service

LO2 Be able to provide post-transaction customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand post-transaction customer service	1.1 Explain organisational policies and procedures for post-transaction customer service
	1.2 Explain the purposes and range of post-transaction activities
	1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
	1.4 Explain how legislation and regulation affect customers' rights
	1.5 Explain the advantages and disadvantages of post-transaction customer service programmes

Learning Outcome	Assessment Criteria
LO2 Be able to provide post-transaction customer service	2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines
	2.2 Use unplanned opportunities post-transaction to provide customer service
	2.3 Identify reasons for contacting customers post-transaction
	2.4 Confirm customers' levels of satisfaction post-transaction
	2.5 Make recommendations to decision makers to enhance customer satisfaction
	2.6 Present a professional and helpful image

CUS24 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS28 – Develop resources to support consistency of customer service delivery

Unit reference number: Y/506/2166

Level: 3

Credit value: 5

Guided Learning (GL) hours: 21

Unit aim

The aim of this unit is to provide learners with an understanding of how knowledge resources are used to support customer service delivery. It will also provide learners with an ability to create and maintain a customer service knowledge base and to develop customer service resource materials.

Learning outcomes

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

LO1 Understand how knowledge resources are used to support customer service delivery

LO2 Be able to create and maintain a customer service knowledge base

LO3 Be able to develop customer service resource materials

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Content requirements of resource materials In line with organisational policies, in line with standards for house style and meeting objectives

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how knowledge resources are used to support customer service delivery	1.1 Explain the structure of a customer service knowledge base
	1.2 Explain the uses of a customer service knowledge base
	1.3 Explain the use of customers' frequently asked questions to support customer service delivery
	1.4 Explain the input and update routines for adding to the knowledge base
	1.5 Explain the content requirements of resource materials and how they should be expressed

Learning Outcome	Assessment Criteria
LO2 Be able to create and maintain a customer service knowledge base	2.1 Identify the information that should be included in a customer service knowledge base
	2.2 Confirm that a knowledge base is kept up to date
	2.3 Promote the contents and use of a knowledge base

Learning Outcome	Assessment Criteria
LO3 Be able to develop customer service resource materials	3.1 Describe the types of questions frequently asked by customers
	3.2 Identify the types of resources needed to support customer service delivery from an analysis of customer needs
	3.3 Identify who will use the resources and in what way
	3.4 Develop resources that meet organisational requirements
	3.5 Communicate the availability and nature of the resources to those who will use them

CUS28 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS29 – Use service partnership to deliver customer service

Unit reference number: D/506/2167

Level: 3

Credit value: 3

Guided Learning (GL) hours: 20

Unit aim

The aim of this unit is to provide learners with an understanding of the use of a service partnership in customer service delivery and ways of building relationships within a customer service partners. It will also provide learners with an ability to deliver customer service within a customer service partnership.

Learning outcomes

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

LO1 Understand the use of a service partnership in customer service delivery

LO2 Understand ways of building relationships within a customer service partnership

LO3 Be able to deliver customer service within a customer service partnership

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

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

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

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

Communication methods may include, but are not exclusive to:

- Written
- Email
- Letters
- Verbal
- Face to face
- Telephone

Negotiating techniques may include, but are not limited to:

- Compensation
- Replacement
- Cost reduction
- Upgrade
- Standard communication
- Referral to specialist team

Sources of information may include, but are not limited to:

- Internal customers
- External customers
- Quality reports
- Sales analysis

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the use of a service partnership in customer service delivery	1.1 Explain the roles and responsibilities of the partners involved in a service chain
	1.2 Explain the advantages and limitations of using a service partnership
	1.3 Explain the use and value of formal and informal service level agreements

Learning Outcome	Assessment Criteria
LO2 Understand ways of building relationships within a customer service partnership	2.1 Describe effective communication methods for dealing with service partners
	2.2 Explain how to develop positive relationships with service partners
	2.3 Describe negotiating techniques for dealing with service partners
	2.4 Describe actions that can be taken to resolve any conflict of interest with service partners

Learning Outcome	Assessment Criteria
LO3 Be able to deliver customer service within a customer service partnership	3.1 Identify the levels of authority that exist within a service partnership
	3.2 Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery
	3.3 Establish service procedures that are acceptable to all members of a service partnership
	3.4 Agree with service partners priorities and resolutions relating to conflicts of interest
	3.5 Identify areas for improvement from the analysis of a range of sources of information

CUS29 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS31 – Resolve customers' complaints

Unit reference number: R/506/2151

Level: 3

Credit value: 4

Guided Learning (GL) hours: 22

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:

LO1 Understand the monitoring and resolution of customers' complaints

LO2 Be able to deal with customers' complaints

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints
	1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery
	1.3 Explain negotiating techniques used to resolve customers' complaints
	1.4 Explain conflict management techniques used in dealing with upset customers
	1.5 Explain organisational procedures for dealing with customer complaints
	1.6 Explain when to escalate customers' complaints
	1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
	1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services

Learning Outcome	Assessment Criteria
LO2 Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints
	2.2 Take personal responsibility for dealing with complaints
	2.3 Communicate in a way that recognises customers' problems and understands their points of view
	2.4 Explain the advantages and limitations of different complaint response options to customers
	2.5 Explain the advantages and limitations of different complaint response options to the organisation
	2.6 Keep customers informed of progress
	2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority
	2.8 Record the outcome of the handling of complaints for future reference
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

CUS31 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS32 – Gather, analyse and interpret customer feedback

Unit reference number: D/506/2170

Level: 3

Credit value: 5

Guided Learning (GL) hours: 24

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:

LO1 Understand how to gather, analyse and interpret customer feedback

LO2 Be able to plan the collection of customer feedback on customer service issues

LO3 Be able to gather customer feedback

LO4 Be able to analyse and interpret customer feedback to recommend improvements

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Bias refers to inclination or prejudice for or against

Techniques to analyse customer feedback could include:

- Verifying data
- Identifying over-arching themes
- Highlighting 'quick wins' and 'red alerts'

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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to gather, analyse and interpret customer feedback	1.1 Describe methods of collecting data for customer research
	1.2 Explain random sampling techniques used to collect data
	1.3 Explain how to evaluate bias in non-random samples
	1.4 Explain the principles of questionnaire design
	1.5 Assess the suitability of a range of techniques to analyse customer feedback
	1.6 Explain techniques used to monitor the quality of data collected
	1.7 Explain the use of software to record and analyse customer feedback
	1.8 Explain the validation issues associated with customer feedback
	1.9 Explain the importance of anonymising comments from customers who do not wish to be identified

Learning Outcome	Assessment Criteria
LO2 Be able to plan the collection of customer feedback on customer service issues	2.1 Identify the objectives of collecting customer feedback
	2.2 Justify the reasons for selecting different data collection methods
	2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe

Learning Outcome	Assessment Criteria
LO3 Be able to gather customer feedback	3.1 Collect customer feedback using the sampling frame identified in a customer service plan
	3.2 Record data in a way that makes analysis straightforward
	3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures

Learning Outcome	Assessment Criteria
LO4 Be able to analyse and interpret customer feedback to recommend improvements	4.1 Use data analysis methods to identify patterns and trends in customer feedback
	4.2 Use the findings of a data analysis to identify areas for improvement to customer service
	4.3 Present the findings of an analysis in the agreed format
	4.4 Recommend improvements in response to the findings of an analysis

CUS32 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS33 – Monitor the quality of customer service interactions

Unit reference number: K/506/2172

Level: 3

Credit value: 5

Guided Learning (GL) hours: 27

Unit aim

The aim of this unit is to provide learners with an understanding of how to monitor the quality of customer service interactions. It will also provide learners with an ability to prepare to monitor, and monitor, the quality of customer service interactions.

Learning outcomes

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

LO1 Understand how to monitor the quality of customer service interactions

LO2 Be able to prepare to monitor the quality of customer service interactions

LO3 Be able to monitor the quality of customer service interactions

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Monitoring techniques may include, but are not limited to:

- Record keeping
- Customer Contact Systems
- E-mails
- Letters
- Task-specific documents

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to monitor the quality of customer service interactions	1.1 Describe techniques for monitoring the quality of customer service interactions
	1.2 Explain organisational procedures and guidelines for customer service delivery
	1.3 Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions
	1.4 Explain how to construct a representative sample of customer service interactions for monitoring purposes
	1.5 Explain how data protection legislation applies to monitoring the quality of customer service interactions
	1.6 Explain how monitoring actions taken can identify possible improvements in customer service interactions
	1.7 Explain techniques to gather customer feedback

Learning Outcome	Assessment Criteria
LO2 Be able to prepare to monitor the quality of customer service interactions	2.1 Identify the criteria against which the quality of customer service interactions will be monitored
	2.2 Specify a sampling frame that would provide information to meet monitoring objectives
	2.3 Select monitoring techniques that are capable of collecting the required information
	2.4 Ensure that staff and customers are made aware of the fact that they will be monitored

Learning Outcome	Assessment Criteria
LO3 Be able to monitor the quality of customer service interactions	3.1 Monitor the quality of customer service interactions with minimal disruption to business
	3.2 Assess the quality of customer service interactions against agreed criteria
	3.3 Identify patterns and trends in colleagues' performance
	3.4 Give constructive feedback to colleagues on the quality of customer service interactions

CUS33 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS35 – Champion customer service

Unit reference number: D/506/2153

Level: 4

Credit value: 4

Guided Learning (GL) hours: 17

Unit aim

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

Learning outcomes

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

LO1 Understand how to champion customer service

LO2 Be able to identify the scope for improvements to customer service

LO3 Be able to champion customer service

Unit content

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.

Assessment guidance

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

Service partners - A service partnership can be formed when a minimum of two organisations or two departments of the same organisation combine in order to provide more effective customer service. A service partner may be one of those organisations or departments.

As a minimum, the analysis should demonstrate that the learner has clearly identified their **service partners**, the contributions that they make, the interdependencies that exist and the implications of non-cooperation.

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

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

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

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

As a minimum, the **analysis of implications** should include cost, benefit, feasibility and impact on service partners. Learners are recommended to take a holistic approach and include improvements identified as part of **AC1.5, 1.6 and 2.1**

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

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

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

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to champion customer service	1.1 Evaluate the importance of viewing operations from the customer's viewpoint
	1.2 Analyse the role of service partners in providing customer service
	1.3 Evaluate the effectiveness of information collection systems and reports
	1.4 Describe organisational decision-making processes and limits of their own authority
	1.5 Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements
	1.6 Describe activities that give added value to the service chain

Learning Outcome	Assessment Criteria
LO2 Be able to identify the scope for improvements to customer service	2.1 Monitor customer service delivery to identify issues that are important to customer service
	2.2 Analyse the implications of improvements to customer service
	2.3 Identify customer service issues relating to new products and/or services
	2.4 Identify the strategic and managerial implications of changes to customer service and the service offer

Learning Outcome	Assessment Criteria
LO3 Be able to champion customer service	3.1 Promote the role of customer service within an organisation's operational plans
	3.2 Inform individual staff members about their role in championing customer service
	3.3 Promote the benefits of effective customer service
	3.4 Provide validated customer service advice and information to colleagues
	3.5 Support others to identify areas for improvement to customer service
	3.6 Monitor the effectiveness of advice and information given
	3.7 Take actions to ensure that customer service delivery meets agreed standards

CUS35 Document History

Version	Issue Date	Changes	Role
V1.0	31/01//2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS38 – Build and maintain effective customer relations

Unit reference number: R/506/2179

Level: 4

Credit value: 6

Guided Learning (GL) hours: 17

Unit aim

The aim of this unit is to provide learners with an understanding of how to build effective relationships with customers. It will also provide learners with an ability to determine the scope for building effective relationships with customers and to develop effective relationships with them. It will also provide learners with an ability to review and improve relationships with customers.

Learning outcomes

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

LO1 Understand how to build effective relationships with customers

LO2 Be able to determine the scope for building effective relationships with customers

LO3 Be able to develop effective relationships with customers

LO4 Be able to review and improve relationships with customers

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

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

Influencing techniques include logical persuading, reciprocative methods and loyalty schemes

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

“Customer centred approach” is pre-empting the customer’s needs and expectations

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to build effective relationships with customers	1.1 Analyse stakeholder mapping techniques
	1.2 Analyse the features of influencing techniques
	1.3 Explain how influencing techniques can be used to improve the relationship with customers
	1.4 Evaluate the benefits and value of relationships with customers and customer loyalty
	1.5 Explain how techniques to manage expectations are applied to the management of customers
	1.6 Explain different types of acceptable compromise
	1.7 Evaluate the benefits of adopting a “customer-centred” approach

Learning Outcome	Assessment Criteria
LO2 Be able to determine the scope for building effective relationships with customers	2.1 Identify the customers with whom relationships should be developed
	2.2 Identify the interests and concerns of customers with whom relationships should be developed
	2.3 Evaluate the scope for and limitations of building relationships with different types of customer

Learning Outcome	Assessment Criteria
LO3 Be able to develop effective relationships with customers	3.1 Behave in a way that creates mutual trust and respect
	3.2 Provide information and perform actions within agreed timescales
	3.3 Take account of feedback provided by customers
	3.4 Keep customers up to date with new products and/or services and developments
	3.5 Assess regularly the extent to which customers’ expectations are met
	3.6 Use personal influence and authority to ensure that customer needs are met or exceeded

Learning Outcome	Assessment Criteria
LO4 Be able to review and improve relationships with customers	4.1 Monitor customer relationships and developments
	4.2 Take action to ensure that others complete agreed actions within agreed timescales
	4.3 Address changes to customer service methods that may have an effect on customer relationships
	4.4 Collect feedback from customers on their levels of satisfaction
	4.5 Recommend improvements to customer service based on analyses of the effectiveness of customer relationships

CUS38 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS40 – Manage a customer service award programme

Unit reference number: L/506/2181

Level: 4

Credit value: 4

Guided Learning (GL) hours: 15

Unit aim

The aim of this unit is to provide learners with an understanding of the management of a customer service award programme. It will also provide learners with an ability to plan and manage a customer service award programme.

Learning outcomes

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

LO1 Understand the management of a customer service award programme

LO2 Be able to plan a customer service award programme

LO3 Be able to manage a customer service award programme

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit

Assessment guidance

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

A **business case** captures the reasoning for initiating a project or task

Simulation is not allowed.

Assessment guidance

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the management of a customer service award programme	1.1 Justify the reasons for an award programme
	1.2 Explain how to make use of a customer service award programme as a promotional tool
	1.3 Explain the likely impact of organisational culture on a customer service award programme
	1.4 Explain the requirements of a business case for a customer service award programme

Learning Outcome	Assessment Criteria
LO2 Be able to plan a customer service award programme	2.1 Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme
	2.2 Evaluate the benefits, drawbacks and costs of different options for a customer service award programme
	2.3 Select the option that best meets the objectives of the award programme
	2.4 Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales
	2.5 Develop award criteria that are transparent and fair

Learning Outcome	Assessment Criteria
LO3 Be able to manage a customer service award programme	3.1 Promote the award programme with the dual purpose of motivating team members and engaging customers
	3.2 Take action to ensure that award winners are recognised in a way that demonstrates organisational commitment to excellent customer service
	3.3 Evaluate the effectiveness of a customer service award programme

CUS40 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS41 – Manage the use of technology to improve customer service

Unit reference number: Y/506/2183

Level: 4

Credit value: 4

Guided Learning (GL) hours: 14

Unit aim

The aim of this unit is to provide learners with an understanding of how to manage the use of technology to improve customer service. It will also provide learners with an ability to identify opportunities for customer service improvement through the use of technology and to implement changes in technology to improve customer service.

Learning outcomes

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

LO1 Understand how to manage the use of technology to improve customer service

LO2 Be able to identify opportunities for customer service improvement through the use of technology

LO3 Be able to implement changes in technology to improve customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to manage the use of technology to improve customer service	1.1 Analyse developments in information and communication technology that relate to customer service
	1.2 Analyse the features, functions and implications of technology for customer service delivery
	1.3 Explain how to monitor the use of technology to improve customer service

Learning Outcome	Assessment Criteria
LO2 Be able to identify opportunities for customer service improvement through the use of technology	2.1 Review the effectiveness of customer service delivery against agreed criteria
	2.2 Identify how customer service delivery could be improved by the introduction or adaptation of technology
	2.3 Assess the costs of changes in the use of technology to improve customer service delivery
	2.4 Make recommendations for changes in the use of technology through a costed business case

Learning Outcome	Assessment Criteria
LO3 Be able to implement changes in technology to improve customer service	3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business
	3.2 Update colleagues on the implementation and expected benefits of new technology
	3.3 Provide staff with training in the use of new technology
	3.4 Monitor the implementation of changes in the use of technology in line with the plan
	3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria

CUS41 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS41 – Manage the use of technology to improve customer service

Unit reference number: Y/506/2183

Level: 4

Credit value: 4

Guided Learning (GL) hours: 14

Unit aim

The aim of this unit is to provide learners with an understanding of how to manage the use of technology to improve customer service. It will also provide learners with an ability to identify opportunities for customer service improvement through the use of technology and to implement changes in technology to improve customer service.

Learning outcomes

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

LO1 Understand how to manage the use of technology to improve customer service

LO2 Be able to identify opportunities for customer service improvement through the use of technology

LO3 Be able to implement changes in technology to improve customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to manage the use of technology to improve customer service	1.1 Analyse developments in information and communication technology that relate to customer service
	1.2 Analyse the features, functions and implications of technology for customer service delivery
	1.3 Explain how to monitor the use of technology to improve customer service

Learning Outcome	Assessment Criteria
LO2 Be able to identify opportunities for customer service improvement through the use of technology	2.1 Review the effectiveness of customer service delivery against agreed criteria
	2.2 Identify how customer service delivery could be improved by the introduction or adaptation of technology
	2.3 Assess the costs of changes in the use of technology to improve customer service delivery
	2.4 Make recommendations for changes in the use of technology through a costed business case

Learning Outcome	Assessment Criteria
LO3 Be able to implement changes in technology to improve customer service	3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business
	3.2 Update colleagues on the implementation and expected benefits of new technology
	3.3 Provide staff with training in the use of new technology
	3.4 Monitor the implementation of changes in the use of technology in line with the plan
	3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria

CUS41 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS42 – Develop a social media strategy for customer service

Unit reference number: D/506/2962

Level: 4

Credit value: 5

Guided Learning (GL) hours: 16

Unit aim

The aim of this unit is to provide learners with an understanding of the development of a customer service social media strategy. It will also to provide learners with an ability to develop a customer service social media strategy and to promote the benefits of social media networking to customer service.

Learning outcomes

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

LO1 Understand the development of a customer service social media strategy

LO2 Be able to develop a customer service social media strategy

LO3 Be able to promote the benefits of social media networking to customer service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Brand values are customers' perceptions of an organisation and/or its products.

External social media tools may include, but are not limited to:

- LinkedIn
- Twitter
- Facebook
- Instagram
- YouTube
- Vimeo
- Pinterest
- Google+
- Flickr

Social media "champion", an advocate for the use of social media for the delivery of customer service to colleagues, team members

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the development of a customer service social media strategy	1.1 Explain the role of social media within the organisation's customer service strategy
	1.2 Analyse the components and scope of a social media strategy and its links with other aspects of the organisation
	1.3 Explain the importance of marketing and brand values for the organisation's strategy
	1.4 Explain the functionality and features of external social media tools
	1.5 Analyse media management tools in relation to social networking
	1.6 Evaluate the way in which the organisation's use of social media contributes to business performance

Learning Outcome	Assessment Criteria
LO2 Be able to develop a customer service social media strategy	2.1 Evaluate the factors affecting the development of a customer service social media strategy
	2.2 Assess the suitability of different methods of engaging customers using social media
	2.3 Analyse competitor presence and activity in social media
	2.4 Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints
	2.5 Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks
	2.6 Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy

Learning Outcome	Assessment Criteria
LO3 Be able to promote the benefits of social media networking to customer service	3.1 Evaluate the benefits and drawbacks of using social media for dissemination purposes
	3.2 Analyse the benefits and consequences of social media engagement with customers
	3.3 Promote on-going dialogue with customers through social networking
	3.4 Act as a social media "champion" within an organisation
	3.5 Analyse the risks attached to the use of social media

CUS42 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

BUS13 – Manage diary systems

Unit reference number: L/506/1807

Level: 2

Credit value: 2

Guided Learning (GL) hours: 12

Unit aim

The aim of this unit is to provide learners with an understanding of the management of diary systems and apply this understanding to manage diary systems.

Learning outcomes

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

LO1 Understand the management of diary systems

LO2 Be able to manage diary systems

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Diary systems 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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the management of diary systems	1.1 Explain the importance of keeping diary systems up to date
	1.2 Describe the basis on which bookings and changes are prioritised
	1.3 Explain any constraints relating to making bookings for people or facilities
	1.4 Describe the types of problems that can occur when managing diaries

Learning Outcome	Assessment Criteria
LO2 Be able to manage diary systems	2.1 Obtain the information needed to make diary entries
	2.2 Make accurate and timely diary entries
	2.3 Respond to changes in a way that balances and meets the needs of those involved
	2.4 Communicate up-to-date information to everyone involved
	2.5 Keep diaries up-to-date
	2.6 Maintain the requirements of confidentiality

BUS13 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

BUS19 – Provide reception services

Unit reference number: H/506/1814

Level: 2

Credit value: 3

Guided Learning (GL) hours: 15

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:

LO1 Understand reception services

LO2 Be able to provide a reception service

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand reception services	1.1 Explain the receptionist's role in representing an organisation
	1.2 Explain an organisation's structure and lines of communication
	1.3 Describe an organisation's standards of presentation
	1.4 Explain the health, safety and security implications of visitors to a building
	1.5 Explain how to deal with challenging people

Learning Outcome	Assessment Criteria
LO2 Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards
	2.2 Direct visitors to the person they are visiting in accordance with organisational standards
	2.3 Record visitors' arrivals and departures in accordance with organisational procedures
	2.4 Provide advice and accurate information within organisational guidelines on confidentiality
	2.5 Keep the reception area tidy and materials up-to-date
	2.6 Answer and deal with telephone calls within organisational standards
	2.7 Adhere to organisational procedures on entry, security, health and safety

BUS19 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

BUS27 – Contribute to the organisation of an event

Unit reference number: L/506/1869

Level: 2

Credit value: 3

Guided Learning (GL) hours: 23

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:

LO1 Understand event organisation

LO2 Be able to carry out pre-event actions

LO3 Be able to set up an event

LO4 Be able to carry out post-event actions

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

The **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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event
	1.2 Explain the purpose and features of different types of events
	1.3 Describe the type of resources needed for different types of events
	1.4 Describe the different needs attendees may have and how to meet these
	1.5 Explain the requirements of health, safety and security when organising events
	1.6 Describe the types of problems that may occur during events and how to deal with them

Learning Outcome	Assessment Criteria
LO2 Be able to carry out pre-event actions	2.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event
	2.2 Explain the purpose and features of different types of events
	2.3 Describe the type of resources needed for different types of events
	2.4 Describe the different needs attendees may have and how to meet these
	2.5 Explain the requirements of health, safety and security when organising events
	2.6 Describe the types of problems that may occur during events and how to deal with them

Learning Outcome	Assessment Criteria
LO3 Be able to set up an event	3.1 Set up layout and resources in accordance with the event plan
	3.2 Confirm that all identified resources are in place and meet requirements
	3.3 Behave in a way that maintains organisational values and standards

Learning Outcome	Assessment Criteria
LO4 Be able to carry out post-event actions	4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract
	4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event

BUS27 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

BUS35 – Buddy a colleague to develop their skills

Unit reference number: M/506/1895

Level: 2

Credit value: 3

Guided Learning (GL) hours: 19

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:

LO1 Understand how to buddy a colleague

LO2 Be able to plan to buddy a colleague

LO3 Be able to support a buddy colleague carrying out work activities

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Techniques to give positive feedback may include:

- 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.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to buddy a colleague	1.1 Describe what is expected of a buddy
	1.2 Explain techniques to give positive feedback and constructive criticism
	1.3 Explain techniques to establish rapport with a buddy

Learning Outcome	Assessment Criteria
LO2 Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying
	2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
	2.3 Agree a schedule of meetings that minimise disruption to business
	2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

Learning Outcome	Assessment Criteria
LO3 Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities
	3.2 Provide examples of how to carry out tasks correctly
	3.3 Identify instances of good practice and areas for improvement through observation
	3.4 Praise a buddy colleague on well completed tasks
	3.5 Give constructive feedback on ways in which a buddy could improve performance
	3.6 Offer a buddy hints and tips based on personal experience

BUS35 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

BUS39 – Employee rights and responsibilities

Unit reference number: L/506/1905

Level: 2

Credit value: 2

Guided Learning (GL) hours: 16

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:

LO1 Understand the role of organisations and industries

LO2 Understand employers' expectations and employees' rights and obligations

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry
	1.2 Describe career pathways within their organisation and industry
	1.3 Identify sources of information and advice on an industry, occupation, training and career pathway
	1.4 Describe an organisation's principles of conduct and codes of practice
	1.5 Explain issues of public concern that affect an organisation and industry
	1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role

Learning Outcome	Assessment Criteria
LO2 Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role
	2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
	2.3 Describe the procedures and documentation that protect relationships with employees
	2.4 Identify sources of information and advice on employment rights and responsibilities

BUS39 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

BUS42 – Negotiate in a business environment

Unit reference number: H/506/1912

Level: 3

Credit value: 4

Guided Learning (GL) hours: 18

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 three outcomes to this unit. The learner will:

LO1 Understand the principles underpinning negotiation

LO2 Be able to prepare for business negotiations

LO3 Be able to carry out business negotiations

Unit content

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.

Assessment guidance

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy
	1.2 Explain the use of different negotiation techniques
	1.3 Explain how research on the other party can be used in negotiations
	1.4 Explain how cultural differences might affect negotiations

Learning Outcome	Assessment Criteria
LO2 Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation
	2.2 Explain the scope of their own authority for negotiating
	2.3 Prepare a negotiating strategy
	2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
	2.5 Assess the likely objectives and negotiation stances of the other party
	2.6 Research the strengths and weaknesses of the other party

Learning Outcome	Assessment Criteria
LO3 Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities
	3.2 Adapt the conduct of the negotiation in accordance with changing circumstances
	3.3 Maintain accurate records of negotiations, outcomes and agreements made
	3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

BUS42 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebrand from skillsfirst	Qualifications Administrator

Unit Handbook

CC20 – Lead direct sales activities in a contact centre team

Unit reference number: D/503/0397

Level: 3

Credit value: 4

Guided Learning (GL) hours: 8

Unit aim

This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team.

Learning outcomes

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

LO1 Be able to carry out sales activities in a contact centre

LO2 Be able to analyse contact centre sales data

LO3 Be able to lead a team involved in direct sales activities in a contact

LO4 Understand sales activities in a contact centre team

Unit content

Evidence requirements

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

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

This unit is linked to the national occupational standards CC 20

Support of the unit by a sector or other appropriate body

This unit is endorsed by SkillsCfA who are the SSC for contact centre qualifications.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to carry out sales activities in a contact centre	1.1 Prepare for a direct sales activity in accordance with organisational procedures
	1.2 Establish customer wishes and needs
	1.3 Offer options to customers by linking their wishes and needs to products and/or services
	1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour
	1.5 Close the sale by agreement with the customer during the customer contact
	1.6 Record the confirmed order in accordance with organisational procedures
	1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre
	1.8 Complete the authorisation or payment in accordance with organisational procedures

Learning Outcome	Assessment Criteria
LO2 Be able to analyse contact centre sales data	2.1 Collate sales data from direct sales activities in a format that enables data manipulation
	2.2 Analyse sales performance against market and customer trends
	2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan

Learning Outcome	Assessment Criteria
LO3 Be able to lead a team involved in direct sales activities in a contact	3.1 Identify sales activities which are capable of fulfilling the sales plan
	3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling
	3.3 Monitor the team's sales performance against agreed targets
	3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach
	3.5 Provide encouragement and guidance to team colleagues during sales activities

Learning Outcome	Assessment Criteria
LO4 Understand sales activities in a contact centre team	4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre
	4.2 Explain the organisational and regulatory requirements of direct sales activities
	4.3 Explain the techniques for overcoming objections and questions from customers during sales activities
	4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective
	4.5 Explain the importance of setting a good example in a contact centre team
	4.6 Explain how to set sales targets including cross-selling and up-selling

CC20 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CC39 – Manage incidents referred to a contact centre

Unit reference number: K/503/0418

Level: 3

Credit value: 6

Guided Learning (GL) hours: 30

Unit aim

This unit concerns being able to manage incidents through a contact centre, provide support to colleagues on incident management and understand management of incidents reported to a contact centre.

Learning outcomes

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

LO1 Be able to manage incidents through a contact centre

LO2 Be able to provide support to colleagues on incident management in a contact centre

LO3 Understand how to manage incidents reported to a contact centre

Unit content

Evidence requirements

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

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the national occupational standards CC 38

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to manage incidents through a contact centre	1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures
	1.2 Select resources that are available to deal with reported incidents
	1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures
	1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures
	1.5 Monitor the management of the incident in accordance with organisational procedures
	1.6 Ensure that the correct decision paths have been followed to manage reported incidents
	1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures

Learning Outcome	Assessment Criteria
LO2 Be able to provide support to colleagues on incident management in a contact centre	2.1 Agree with colleagues the areas in which they need support and guidance in incident management
	2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs
	2.3 Identify actions to improve team performance in incident handling from a review of incident management results

Learning Outcome	Assessment Criteria
LO3 Understand how to manage incidents reported to a contact centre	3.1 Explain the incident management services offered by the contact centre
	3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident
	3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents
	3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident
	3.5 Describe the strengths and weaknesses of different types of support for colleagues
	3.6 Explain the importance of reviewing incident management results

CC39 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

IT301 – Bespoke software

Unit reference number: J/502/4397

Level: 3

Credit value: 4

Guided Learning (GL) hours: 30

Unit aim

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. On completion of this unit a candidate should be able to select and use a range of advanced bespoke software tools and techniques for complex or non-routine information. Bespoke software tools and techniques will be defined as 'advanced' because:

- the software tools and functions used will be complex, and at times involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application;
- the user will take full responsibility for inputting, manipulating and outputting the information

Learning outcomes

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

LO1 Input and combine information using bespoke software

LO2 Create and modify appropriate structures to organise and retrieve information efficiently

LO3 Exploit the functions of the software effectively to process and present information

Version 1

Unit content

Evidence requirements

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

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed SkillsCfA, the sector skills council for business and administration.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Input and combine information using bespoke software	1.1 Input relevant information accurately so that it is ready for processing
	1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications

Learning Outcome	Assessment Criteria
LO2 Create and modify appropriate structures to organise and retrieve information efficiently	2.1 Evaluate the use of software functions to structure, layout and style information
	2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently
	2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

Learning Outcome	Assessment Criteria
LO3 Exploit the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, analyse and format information
	3.2 Check information meets needs, using IT tools and making corrections as necessary
	3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
	3.4 Select and use presentation methods to aid clarity and meaning

IT301 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

ML10 – Promote equality, diversity and inclusion in the workplace

Unit reference number: T/506/1820

Level: 3

Credit value: 3

Guided Learning (GL) hours: 15

Unit aim

The aim of this unit is to provide learners with an understanding of the organisational and personal aspects of equality, diversity and inclusion in the workplace. It will also provide learners with the ability to support equality, diversity and inclusion in the workplace.

Learning outcomes

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

LO1 Understand the organisational aspects of equality, diversity and inclusion in the workplace

LO2 Understand the personal aspects of equality, diversity and inclusion in the workplace

LO3 Be able to support equality, diversity and inclusion in the workplace

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Learners should ensure they specifically address all three areas of:

- Equality
- Diversity and
- Inclusion

when meeting the relevant criteria in this unit.

Equality Legislation will include but is not limited to Equality Act 2010

Forms of discrimination may include but are not limited to:

- Direct Discrimination
- Indirect Discrimination

Colleagues primarily relates to colleagues for whom the learner has line manager responsibility

Simulation is not allowed.

Unit endorsement

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1 Explain the difference between equality, diversity and inclusion
	1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy
	1.3 Explain the potential consequences of breaches of equality legislation
	1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion

Learning Outcome	Assessment Criteria
LO2 Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1 Explain the different forms of discrimination and harassment
	2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
	2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace

Learning Outcome	Assessment Criteria
LO3 Be able to support equality, diversity and inclusion in the workplace	3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace
	3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace
	3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

ML10 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

ML11 – Manage team performance

Unit reference number: A/506/1821

Level: 3

Credit value: 4

Guided Learning (GL) hours: 21

Unit aim

The aim of this unit is to provide learners with an understanding of the management of team performance. It also provides learners with the ability to allocate and assure the quality of work and to manage communications within a team.

Learning outcomes

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

LO1 Understand the management of team performance

LO2 Be able to allocate and assure the quality of work

LO3 Be able to manage communications within a team

Unit content

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.

Assessment guidance

A **benchmark** is a standard or measurement that could include:

- Key performance indicators (KPIs)
- Best operational practices

Quality management techniques may include:

- Total quality management (TQM)
- Statistical process control (SPC)
- Continual improvement processes

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance
	1.2 Explain a range of quality management techniques to manage team performance
	1.3 Describe constraints on the ability to amend priorities and plans

Learning Outcome	Assessment Criteria
LO2 Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members
	2.2 Allocate work on the basis of the strengths, competences and expertise of team members
	2.3 Identify areas for improvement in team members' performance outputs and standards
	2.4 Amend priorities and plans to take account of changing circumstances
	2.5 Recommend changes to systems and processes to improve the quality of work

Learning Outcome	Assessment Criteria
LO3 Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels
	3.2 Communicate individual and team objectives, responsibilities and priorities
	3.3 Use communication methods that are appropriate to the topics, audience and timescales
	3.4 Provide support to team members when they need it
	3.5 Agree with team members a process for providing feedback on work progress and any issues arising
	3.6 Review the effectiveness of team communications and make improvements

ML11 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

ML12 – Manage individuals' performance

Unit reference number: J/506/1921

Level: 3

Credit value: 4

Guided Learning (GL) hours: 20

Unit aim

The aim of this unit is to provide learners with an understanding of the management of underperformance in the workplace and the ability to manage individuals' performance

Learning outcomes

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

LO1 Understand the management of underperformance in the workplace

LO2 Be able to manage individuals' performance in the workplace

Unit content

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.

Assessment guidance

Organisational objectives are the overall goals, purpose and mission of a business as established by its management

Motivation techniques may include, but are not limited to:

- Incentives and rewards
- Flexible working arrangements
- Praise and gratitude
- Coaching or mentoring

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance
	1.2 Explain how to identify causes of underperformance
	1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively
	1.4 Explain how to address issues that hamper individuals' performance
	1.5 Explain how to agree a course of action to address underperformance

Learning Outcome	Assessment Criteria
LO2 Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
	2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
	2.3 Apply motivation techniques to maintain morale
	2.4 Provide information, resources and ongoing mentoring to help individuals meet their targets, objectives and quality standards
	2.5 Monitor individuals' progress towards objectives in accordance with agreed plans
	2.6 Recognise individuals' achievement of targets and quality standards
	2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace

ML12 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

ML21 – Collaborate with other departments

Unit reference number: M/506/1931

Level: 3

Credit value: 3

Guided Learning (GL) hours: 14

Unit aim

The aim of this unit is to provide learners with an understanding of how to collaborate with other departments. It is also to provide learners with an ability to identify opportunities for, and to collaborate with, other departments

Learning outcomes

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

LO1 Understand how to collaborate with other departments

LO2 Be able to identify opportunities for collaboration with other departments

LO3 Be able to collaborate with other departments

Unit content

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.

Assessment guidance

Collaborating may include, but is not limited to:

- Meeting to discuss ideas
- Sharing information
- Sharing resources
- Working on a common project
- Secondment of team members

Knowledge management is the process of capturing, sharing, developing and effectively using organisational knowledge

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

Organisational objectives are the overall goals, purpose and mission of a business as established by its management

Simulation is not allowed.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to collaborate with other departments	1.1 Explain the need for collaborating with other departments
	1.2 Explain the nature of the interaction between their own team and other departments
	1.3 Explain the features of effective collaboration
	1.4 Explain the potential implications of ineffective collaboration with other departments
	1.5 Explain the factors relating to knowledge management that should be considered when collaborating with other departments

Learning Outcome	Assessment Criteria
LO2 Be able to identify opportunities for collaboration with other departments	2.1 Analyse the advantages and disadvantages of collaborating with other departments
	2.2 Identify with which departments collaborative relationships should be built
	2.3 Identify the scope for and limitations of possible collaboration

Learning Outcome	Assessment Criteria
LO3 Be able to collaborate with other departments	3.1 Agree service level agreements (SLAs), objectives and priorities of collaborative arrangements
	3.2 Work with other departments in a way that contributes to the achievement of organisational objectives

ML21 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

Unit Handbook

SA207 – Processing sales orders

Unit reference number: M/502/8587

Level: 2

Credit value: 2

Guided Learning (GL) hours: 17

Unit aim

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

Learning outcomes

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

LO1 Understand how to process and follow up sales orders

LO2 Be able to process sales orders

LO3 Be able to follow up sales order processing

Unit content

Evidence requirements

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

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by CfA, the sector skills council for Sales.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing
	1.2 Describe organisational processes for ordering products and/or services
	1.3 Describe different sources of information used to check customer credit
	1.4 Describe the different payment methods accepted by sales orientated organisations
	1.5 Explain the role of the despatch function
	1.6 Describe service standards relating to sales order completion
	1.7 Explain the importance of storing information securely

Learning Outcome	Assessment Criteria
LO2 Be able to process sales orders	2.1 Identify customer sales order requirements
	2.2 Check that the credit status of the customer meets organisational standards
	2.3 Confirm the availability of products and/or services to the customer
	2.4 Ensure that information given to the customer about delivery, timing and price is accurate
	2.5 Ensure that the sale is authorised following the organisation's procedures
	2.6 Finalise the transaction in accordance with organisational procedures
	2.7 Ensure that the customer is aware of the terms and conditions of sale
	2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders
	2.9 Identify who to go to when in need of support with sales order processing problems

Learning Outcome	Assessment Criteria
LO3 Be able to follow up sales order processing	3.1 Keep the customer informed of the sales order progress and any problems with the sale order
	3.2 Advise the customer of current discounts and special offers
	3.3 Check all information is stored securely

SA207 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

SA301 – Negotiating, handling objections and closing sales

Unit reference number: F/502/8612

Level: 3

Credit value: 4

Guided Learning (GL) hours: 22

Unit aim

This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.

Learning outcomes

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

LO1 Understand how to handle objections and negotiate with the customer

LO2 Be able to prepare for objections and negotiation with the customer

LO3 Be able to handle objections

LO4 Be able to negotiate with the customer

LO5 Be able to close the sale following negotiation

Unit content

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by CfA, the sector skills council for Sales.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by CfA, the sector skills council for Sales.

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Evidence requirements

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to handle objections and negotiate with the customer	1.1 Describe the scope of authority and responsibility when dealing with objections
	1.2 Identify the resources available to counter the sales objections
	1.3 Describe how to plan and prepare for negotiation
	1.4 Describe how to use testimonials to progress a sale
	1.5 Explain the advantages and disadvantages of different methods of closing a sale
	1.6 Explain organisational procedures for documenting the negotiated sale

Learning Outcome	Assessment Criteria
LO2 Be able to prepare for objections and negotiation with the customer	2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer
	2.2 Confirm authorisation to negotiate
	2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome

Learning Outcome	Assessment Criteria
LO3 Be able to handle objections	3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques
	3.2 Identify and prioritise customers' concerns
	3.3 Provide evidence to the customer of the strengths of the organisation's products or services
	3.4 Confirm with the customer that the objection(s) have been overcome
	3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals

Learning Outcome	Assessment Criteria
LO4 Be able to negotiate with the customer	4.1 Carry out negotiations according to negotiation plan
	4.2 Promote the benefits of what is being offered to the customer
	4.3 Explain to the customer when and why no further adjustment is possible
	4.4 Obtain support to progress negotiation that is outside own level of authority

Learning Outcome	Assessment Criteria
LO5 Be able to close the sale following negotiation	5.1 Apply a trial close in accordance with the negotiation plan
	5.2 Respond to any further objections and concerns
	5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities
	5.4 Summarise agreements made in accordance with organisational procedures and close the sale

SA301 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

SA302 – Obtaining and analysing sales-related information

Unit reference number: R/502/8615

Level: 3

Credit value: 4

Guided Learning (GL) hours: 24

Unit aim

This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets for products and/or services and the volume, mix and value of the products or services sold.

Learning outcomes

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

LO1 Understand the uses of sales-related information

LO2 Understand how to use tools and methods to analyse sales-related information

LO3 Be able to obtain sales-related information about customers, markets and competitors

LO4 Be able to use tools and methods to analyse sales-related information

Unit content

Evidence requirements

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

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by SkillsCfA, the sector skills council for sales.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by SkillsCfA, the sector skills council for sales.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the uses of sales-related information	1.1 Explain the importance of up to date information for sales planning purposes
	1.2 Explain the benefits and risks of using a range of information sources to support sales activities
	1.3 Explain the limitations of sales-related information
	1.4 Explain the importance of reviewing sales data requirements for current and future use

Learning Outcome	Assessment Criteria
LO2 Understand how to use tools and methods to analyse sales-related information	2.1 Explain the advantages and disadvantages of different systems to gather sales-related information
	2.2 Explain how to use different software packages for analysing and presenting sales-related information

Learning Outcome	Assessment Criteria
LO3 Be able to obtain sales-related information about customers, markets and competitors	3.1 Specify the information needed to develop an understanding of customers, competitors and markets
	3.2 Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors
	3.3 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation

Learning Outcome	Assessment Criteria
LO4 Be able to use tools and methods to analyse sales-related information	4.1 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information
	4.2 Define the information needs of the target audience for different types of sales-related information
	4.3 Use the analytical protocols that are appropriate to the selected tools and methods
	4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information
	4.5 Validate the reliability and validity of the findings of the analysis
	4.6 Provide sales-related information to the target audience within the agreed timescale and budget

SA302 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

SA304 – Buyer behaviour in sales situations

Unit reference number: K/502/8622

Level: 3

Credit value: 3

Guided Learning (GL) hours: 27

Unit aim

This unit aims to provide the knowledge, understanding and skill necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.

Learning outcomes

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

LO1 Understand the impact of different models of buyer behaviour on the sales cycle

LO2 Be able to respond to the buyer at each stage of the decision making process

Unit content

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by CfA, the sector skills council for Sales.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by CfA, the sector skills council for Sales.

Functional Skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Evidence requirements

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

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the impact of different models of buyer behaviour on the sales cycle	1.1 Explain the consumer buying decision-making process
	1.2 Explain how the consumer buying decision-making process affects the sales cycle
	1.3 Describe the influences that affect the consumer decision-making process
	1.4 Explain the organisational buying decision-making process
	1.5 Explain how the organisational buying decision-making process affects the sales cycle
	1.6 Describe the influences that affect the organisational buying decision-making process
	1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle

Learning Outcome	Assessment Criteria
LO2 Be able to respond to the buyer at each stage of the decision making process	2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process
	2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role
	2.3 Use objections as buying opportunities
	2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

SA304 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

CUSD3 Document History

Version	Issue Date	Changes	Role
v3	08/02/2023	Formatting and re-branding. No content amendment.	Data Administrator