



INSTITUTE
OF THE MOTOR
INDUSTRY

IMI QUALIFICATION



QUALIFICATION SPECIFICATION PART B LEARNER ASSESSMENT RECORD

IMI Level 2 Diploma in Customer Service

Ofqual I.D: 601/3456/2

Version 1: September 2014

Note: The Learner Guidance for Customer Service qualifications should be read by the Learner, prior to starting this Learner Assessment Record.

CENTRE INFORMATION

Please be aware that any **legislation** referred to in this qualification may be subject to amendment/s during the life of this qualification. Therefore IMI Approved Centres must ensure they are aware of and comply with any amendments, e.g. to health and safety legislation and employment practices.

Please be aware that **vehicle technologies** referred to in this qualification reflect current practice, but may be subject to amendment/s, updates and replacements during the life of this qualification. Therefore IMI Approved Centres must ensure they are aware of the latest developments and emerging technologies to ensure the currency of this qualification.

Please note: the relevance of the information contained in the **unit content** will vary depending upon the vehicle types being worked upon. The unit content is for guidance only and is not meant to be prescriptive.

© 2015 IMI

All rights reserved. No part of this publication may be reproduced, stored in retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of IMI

Requests should be made in writing and addressed to:
Institute of the Motor Industry (IMI)
Fanshaws, Brickendon, Hertford SG13 8PQ



CONTACT SHEET

Learner Name:	
Learner Registration No:	
Learner Address:	
Learner Tel No:	
Learner Email:	
Employer Contact:	
Employer Name & Address:	
Employer Tel No:	

Please complete as appropriate:	
Witness Name:	Witness Name:
Witness Job Title:	Witness Job Title:
Witness Signature:	Witness Signature:
Witness Name:	Witness Name:
Witness Job Title:	Witness Job Title:
Witness Signature:	Witness Signature:
Assessor Name:	Assessor Name:
Assessor Signature:	Assessor Signature:
Assessor Name:	
Assessor Signature:	
Internal Verifier Name:	Internal Verifier Name:
Internal Verifier Signature:	Internal Verifier Signature:



IMI Level 2 Diploma in Customer Service ID: 601/3456/2

To achieve a Level 2 Diploma in Customer Service, learners must complete a minimum of 45 credits. (A minimum of 45 credits must be achieved through the completion of units at Level 2 or above.)

Group A: 19 credits must be achieved

Group B: A minimum of 3 credits must be achieved

Group C: A minimum of 16 credits must be achieved

Group D: A maximum of 7 credits may be achieved

Minimum GLH: 245

Maximum GLH: 305

Mandatory Group A: 19 Credits					
CFA Ref.	Ofqual Ref.	Title	Credit	Level	GLH
CS 7	A/506/213 0	Deliver customer service	5	2	27
CS 8	F/506/213 1	Understand customers	2	2	17
CS 9	J/506/213 2	Principles of customer service	4	2	34
B&A 38	A/506/196 4	Understand employer organisations	4	2	40
M&L 1	L/506/178 8	Manage personal performance and development	4	2	18

Optional Group B: Minimum of 3 Credits					
CFA Ref.	Ofqual Ref.	Title	Credit	Level	GLH
CS 5	D/506/211 9	Communicate verbally with customers	3	2	14
CS 6	T/506/212 6	Communicate with customers in writing	3	2	20

Optional Group C: Minimum of 16 Credits					
CFA Ref.	Ofqual Ref.	Title	Credit	Level	GLH
CS 10	H/506/215 4	Deal with incoming telephone calls from customers	3	2	16
CS 11	K/506/215 5	Make telephone calls to customers	3	2	16
CS 12	L/506/213 3	Promote additional products and/or services to customers	2	2	14
CS 13	R/506/213 4	Process information about customers	3	2	14
CS 14	Y/506/213 5	Exceed customer expectations	3	2	15
CS 15	T/506/214 3	Deliver customer service whilst working on customer's premises	4	2	20
CS 16	T/506/215 7	Carry out customer service handovers	3	2	15
CS 17	A/506/215 8	Resolve customer service problems	5	2	22
CS 18	F/506/215 9	Deliver customer service to challenging customers	3	2	16



Optional Group C continued.					
CFA Ref.	Ofqual Ref.	Title	Credit	Level	GLH
CS 19	Y/506/214 9	Develop customer relationships	3	2	18
CS 20	T/506/216 0	Support customer service improvements	3	2	12
CS 21	A/506/216 1	Support customers through real-time online customer service	3	2	15
CS 22	H/506/297 7	Support customers using self-service equipment	3	2	18
CS 23	J/506/216 3	Use social media to deliver customer service	3	2	18
CS 24	K/506/297 8	Provide post-transaction customer service	5	2	22
CS 31	R/506/215 1	Resolve customers' complaints	4	3	22
CS 32	D/506/217 0	Gather, analyse and interpret customer feedback	5	3	24

Optional Group D: Maximum of 7 Credits					
CFA Ref.	Ofqual Ref.	Title	Credit	Level	GLH
HSPW2	T/505/467 3	Health and safety procedures in the workplace	2	2	16
B&A 13	L/506/180 7	Manage diary systems	2	2	12
B&A 19	H/506/181 4	Provide reception services	3	2	15
B&A 27	L/506/186 9	Contribute to the organisation of an event	3	2	23
B&A 35	M/506/189 5	Buddy a colleague to develop their skills	3	2	19
B&A 39	L/506/190 5	Employee rights and responsibilities	2	2	16
M&L 2	R/506/178 9	Develop working relationships with colleagues	3	2	19
M&L 7	J/506/180 6	Principles of equality and diversity in the workplace	2	2	10
SAL2-7	M/502/858 7	Processing sales orders	2	2	17
SAL2-13	R/502/860 1	Meeting customers' after sales needs	3	2	14
SAL2-14	M/502/860 6	Handling objections and closing sales	3	2	22
CC38	K/503/042 1	Deal with incidents through a contact centre	7	2	40
CC19	L/503/039 4	Carry out direct sales activities in a contact centre	5	2	15
B&A 42	H/506/191 2	Negotiate in a business environment	4	3	18
BS2	F/502/439 6	Bespoke software	3	2	20



Learner Name:

UNIT REF: CS 7	UNIT TITLE: DELIVER CUSTOMER SERVICE
-----------------------	---

Level: 2	Credit Value: 5	GLH: 27
Mapping: CFACSA1, CFACSA2, CFACSA4, CFACSA7, CFACSA8, CFACSB1, CFACSB2 & CFACSF2		
Rationale: This unit aims to develop the knowledge and skills required to deliver customer service. Upon completion of this unit, learners will be able to prepare to deal with customers, provide customer service, and support improvements to customer service delivery.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand customer service delivery	1.1 Explain the relationship between customers' needs and expectations and customer satisfaction		
	1.2 Describe the features and benefits of an organisation's products and/or services		
	1.3 Explain the importance of treating customers as individuals		
	1.4 Explain the importance of balancing promises made to customers with the needs of an organisation		
	1.5 Explain when and to whom to escalate problems		
	1.6 Describe methods of measuring their own effectiveness in the delivery of customer service		
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to an organisation		
	2.2 Explain how a brand affects an organisation's customer service offer		
	2.3 Explain the importance of using customer service language that supports a brand promise		
	2.4 Identify their own role in ensuring that a brand promise is delivered		
3. Be able to prepare to deal with customers	3.1 Keep up to date with an organisation's products and/or services		
	3.2 Prepare resources that are necessary to deal with customers before starting work		
4. Be able to provide customer service	4.1 Maintain organisational standards of presentation and behaviour when providing customer service		
	4.2 Adapt their own behaviour to meet customers' needs or expectations		
	4.3 Respond to customers' requests in line with organisational guidelines		
	4.4 Inform customers of the progress of their requests		
	4.5 Confirm that customers' expectations have been met in line with the service offer		
	4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service		
5. Be able to support improvements to customer service delivery	5.1 Identify ways that customer service could be improved for an organisation and individuals		
	5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 7 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Describe the features and benefits of an organisation's products and/or services	Features are characteristics, attributes and qualities of a product or service Benefits are advantages and uses of a service or product
1.6 Describe methods of measuring their own effectiveness in the delivery of customer service	Methods of measuring their own effectiveness may include, but are not limited to: <ul style="list-style-type: none">• customer feedback• peer feedback• reviewing performance against targets
2.1 Explain the importance of a brand to an organisation	Brand is a type of product /service provided by a particular company under a specific name
2.3 Explain the importance of using customer service language that supports a brand promise	Customer service language could include phrases, such as: <ul style="list-style-type: none">• "my pleasure"• "no problem"• "have a good day"• "thank you for your custom"



Learner Name:

UNIT REF: CS 8	UNIT TITLE: UNDERSTAND CUSTOMERS
-----------------------	---

Level: 2	Credit Value: 2	GLH: 17
Mapping: CFACSF3 & CFACSB15		
Rationale: This unit aims to develop the underpinning knowledge required to understand customers. Upon completion of this unit, learners will have developed an understanding of different types of customers and will also know the value of customers and their loyalty.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers		
	1.2 Explain how cultural factors can affect customers' expectations		
	1.3 Describe the characteristics of challenging customers		
	1.4 Explain how to identify dissatisfied customers		
2. Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty		
	2.2 Explain the relationship between customer satisfaction and organisational performance		
	2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services		
	2.4 Explain the potential consequences of customers' dissatisfaction		
	2.5 Describe different methods of attracting customers and retaining their loyalty		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit CS 8 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Explain how cultural factors can affect customers' expectations	Cultural factors can include, <ul style="list-style-type: none"> • Stories portrayed in the media • Industry standard setting • Demographics such as age, gender, socio-economic status • Religious, moral views
2.4 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty	Service offer is defined as the extent and limits of the customer service that an organisation is offering



Learner Name:

UNIT REF: CS 9	UNIT TITLE: PRINCIPLES OF CUSTOMER SERVICE
-----------------------	---

Level: 2	Credit Value: 4	GLH: 34
Mapping: CFACSA6, CFACSB2, CFACSB4, CFACSB12 & CFACSF3		
<p>Rationale: This unit aims to develop knowledge and understanding regarding the key principles of customer service. Upon completion of this unit, learners will have developed an understanding of customer service and how to deliver it effectively. Learners will also develop an awareness of how legal and ethical requirements relate to customer service and will understand the management of customer service information.</p>		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand customer service	1.1 Explain the purpose and scope of customer service		
	1.2 Define the term 'service offer'		
	1.3 Explain the value of a 'service offer' to an organisation		
	1.4 Explain the importance of delivering consistently high quality customer service		
	1.5 Explain the importance of keeping up to date with knowledge of competitors' activities		
	1.6 Explain barriers to providing effective customer service		
	1.7 Describe the features of effective follow-up service		
2. Understand how legal and ethical requirements relate to customer service	2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service		
	2.2 Describe how health, safety and environmental legislation affects customer service delivery		
	2.3 Explain how ethical considerations affect customer service		
	2.4 Explain how equality legislation affects customer service		
	2.5 Describe how legislation affects the use and storage of customer information		
3. Understand how to deliver effective customer service	3.1 Explain the difference between customers' wants, needs and their expectations		
	3.2 Explain how to identify customers' needs and expectations		
	3.3 Explain the importance of managing customers' expectations		
	3.4 Explain how to behave in a way that meets customers' expectations		
	3.5 Describe techniques that can be used to put customers at ease and gain their trust		
	3.6 Explain the importance of following up actions and keeping promises when delivering customer service		



LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
4. Understand the management of customer service information	4.1 Explain how customer service information can be used		
	4.2 Explain the importance of systems to manage customer service information		
	4.3 Explain the uses of systems to manage customer service information		
	4.4 Identify the features of an effective customer complaints process		
	4.5 Describe the uses of a customer complaints process		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 9 Assessment Guidance table

<p>Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.</p>	
1.5 Explain the importance of keeping up to date with knowledge of competitors' activities	Competitors are organisations that offer products or services that are similar to those offered by the organisation the learner is employed by.
1.7 Describe the features of effective follow-up service	Follow-up service includes servicing and guarantees
2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service	<p>Sales and consumer legislation and regulations may include, but are not limited to:</p> <ul style="list-style-type: none"> • Consumer Credit Act • Sale of Goods Act • Supply of Goods & Services Act • Distance Selling Regulations • Treating Customer Fairly (TCF)
2.2 Describe how health, safety and environmental legislation affects customer service delivery	<p>Health, safety and environmental legislation may include, but is not limited to:</p> <ul style="list-style-type: none"> • Environment and Safety Information Act • Health and Safety at Work Act
2.3 Explain how ethical considerations affect customer service	<p>Ethical considerations may include, but are not limited to:</p> <ul style="list-style-type: none"> • corporate social responsibility (CSR) • 'Fairtrade' • globalisation • sustainability • social enterprise • work-life balance
2.4 Explain how equality legislation affects customer service	<p>Equality legislation may include, but is not limited to:</p> <ul style="list-style-type: none"> • Equality Act 2010
3.3 Explain the importance of managing customers' expectations	Customer expectations are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service
3.5 Describe techniques that can be used to put customers at ease and gain their trust	Techniques may include, verbal and non-verbal methods of communication
4.2 Explain the importance of systems to manage customer service information	<p>Systems may include, but are not limited to:</p> <ul style="list-style-type: none"> • Records • Archives • Customer Contact Systems



Learner Name:

UNIT REF: B&A 38	UNIT TITLE: UNDERSTAND EMPLOYER ORGANISATIONS
----------------------------	--

Level: 2	Credit Value: 4	GLH: 40
Mapping: CFABAF174		
Rationale: This unit aims to develop knowledge and understanding regarding employer organisations. Upon completion of this unit, learners will have developed an understanding of organisational structures and the organisational environment.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand organisational structures	1.1 Explain the differences between the private sector, public sector and voluntary sector		
	1.2 Explain the functions of different organisational structures		
	1.3 Describe the features of different types of legal structures for organisations		
2. Understand the organisational environment	2.1 Describe the internal and external influences on organisations		
	2.2 Explain the use of different models of analysis in understanding the organisational environment		
	2.3 Explain why change in the business environment is important		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit B&A 38 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
2.2 Explain the use of different models of analysis in understanding the organisational environment	Models of analysis to include: SWOT (strengths, weaknesses, opportunities and threats) PESTLE (political, economic, social, technological, legal and environment)



Learner Name:

UNIT REF: M&L 1	UNIT TITLE: MANAGE PERSONAL PERFORMANCE AND DEVELOPMENT
----------------------------	--

Level: 2	Credit Value: 4	GLH: 18
Mapping: CFAM&LAA1		
Rationale: This unit aims to provide the knowledge and skills required to develop customer service through social media. Upon completion of this unit, learners will be able to identify the scope for improvements to customer service through the use of social media and will be able to develop customer service provision through social media networks.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager		
	1.2 Agree criteria for measuring progress and achievement with line manager		
	1.3 Complete tasks to agreed timescales and quality standards		
	1.4 Report problems beyond their own level of competence and authority to the appropriate person		
	1.5 Take action needed to resolve any problems with personal performance		
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques		
	2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives		
	2.3 Explain the benefits of achieving an acceptable "work-life balance"		
3. Be able to identify their own development needs	3.1 Identify organisational policies relating to personal development		
	3.2 Explain the need to maintain a positive attitude to feedback on performance		
	3.3 Explain the potential business benefits of personal development		
	3.4 Identify their own preferred learning style(s)		
	3.5 Identify their own development needs from analyses of the role, personal and team objectives		
	3.6 Use feedback from others to identify their own development needs		
	3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs		



LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
4. Be able to fulfil a personal development plan	4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms		
	4.2 Make use of formal development opportunities that are consistent with business needs		
	4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives		
	4.4 Review progress against agreed objectives and amend plans accordingly		
	4.5 Share lessons learned with others using agreed communication methods		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit M&L 1 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: CS 5	UNIT TITLE: COMMUNICATE VERBALLY WITH CUSTOMERS
-----------------------	--

Level: 2	Credit Value: 3	GLH: 14
Mapping: CFACSA3 & CFACSB6		
Rationale: This unit aims to develop the knowledge and skills required to communicate verbally with customers. Upon completion of this unit, learners will be able to use customer service language to communicate with customers.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------



Unit CS 5 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.3 Explain why customer service language is used	Customer service language may include phrases such as: <ul style="list-style-type: none">• “my pleasure”• “no problem”• “have a good day”• “thank you for your custom”
1.4 Describe different questioning techniques that can be used when communicating with customers	Questioning techniques may include, but is not exclusive to: <ul style="list-style-type: none">• open• closed• verbal• written• probing• clarification
1.5 Describe verbal and non-verbal signals that show how a customer may be feeling	A verbal signal is a phrase or statement said by the customer.
	A non-verbal signal is the body language of the customer
2.4 Listen actively to what customers are saying	Listening actively refers to: <ul style="list-style-type: none">• 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
2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers	Legal and ethical requirements will be specific to the sector but could include: <ul style="list-style-type: none">• The Data Protection Act• The Equality Act



Learner Name:

UNIT REF: CS 6	UNIT TITLE: COMMUNICATE WITH CUSTOMERS IN WRITING
-----------------------	--

Level: 2	Credit Value: 3	GLH: 20
Mapping: CFACSA13		
Rationale: This unit aims to develop the knowledge and skills required to communicate with customers in writing. Upon completion of this unit, learners will be able to both plan and produce written communications.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 6 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive	
1.1 Explain why it is necessary to use different forms of written communication for different purposes	Written communication may include letter, email, online forum etc.
1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing	Implications , including those of a legal nature.
2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer	Service offer defines the extent and limits of the customer service that an organisation is offering.



Learner Name:

UNIT REF: CS 10	UNIT TITLE: DEAL WITH INCOMING TELEPHONE CALLS FROM CUSTOMERS
------------------------	--

Level: 2	Credit Value: 3	GLH: 16
Mapping: CFACSA11		
Rationale. : This unit aims to develop the knowledge and skills required to deal with incoming telephone calls from customers. Upon completion of this unit, learners will be able to establish the purpose of incoming customer calls and deal with customer questions and requests.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand how to deal with incoming customer calls	1.1 Explain why an organisation should have guidance on dealing with telephone calls		
	1.2 Explain why an organisation should have an identity checking process		
	1.3 Explain the importance of keeping customer information up to date		
	1.4 Explain the importance of keeping customers informed of the progress of their call		
	1.5 Describe how body language and facial expressions can be detected over the telephone		
	1.6 Describe different questioning techniques used when dealing with incoming calls		
	1.7 Explain how to handle abusive calls		
2. Be able to establish the purpose of incoming customer calls	2.1 Verify the identity of callers in line with organisational guidelines		
	2.2 Speak clearly, concisely and politely using speech and tone to create a rapport		
	2.3 Adapt their own communication style to meet customers' needs		
	2.4 Listen actively to what customers are saying to collect as much information as possible		
	2.5 Use questioning techniques that are appropriate to the conversation		
	2.6 Record information in line with organisational guidelines		
3. Be able to deal with customer questions and requests	3.1 Respond in a way that best meets customer and organisational requirements		
	3.2 Give clear and concise information that meets customers' needs		
	3.3 Manage the length of the conversation		
	3.4 Confirm that the customer is satisfied with the outcomes of the conversation		
	3.5 Complete agreed post-call follow up actions		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 10 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Explain why an organisation should have an identity checking process	Identity checking processes could include but are not exclusive to: <ul style="list-style-type: none">• Third party verification (TPV)• Passwords• Passport/bank account numbers
1.6 Describe different questioning techniques used when dealing with incoming calls	Questioning techniques may include, but is not exclusive to: <ul style="list-style-type: none">• open• closed• verbal• written• probing• clarification
2.4 Listen actively to what customers are saying to collect as much information as possible	Listening actively refers to: <ul style="list-style-type: none">• 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



Learner Name:

UNIT REF: CS 11	UNIT TITLE: MAKE TELEPHONE CALLS TO CUSTOMERS
------------------------	--

Level: 2	Credit Value: 3	GLH: 16
Mapping: CFACSA12		
Rationale: This unit aims to develop the knowledge and skills required to make telephone calls to customers. Upon completion of this unit, learners will be able to plan, and make, telephone calls to customers.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand how to make telephone calls to customers	1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls		
	1.2 Explain the importance of keeping customer information up to date		
	1.3 Explain the reasons for organisational guidance on dealing with telephone calls		
	1.4 Explain the reasons for organisational identity checking processes		
	1.5 Explain how body language and facial expressions can be detected over the telephone		
	1.6 Describe different questioning techniques when dealing with customers		
	1.7 Explain organisational guidelines for what can and cannot be said or promised		
	1.8 Explain how to handle abusive calls from customers		
2. Be able to plan telephone calls to customers	2.1 Identify the objective(s) of calls		
	2.2 Prepare the information needed to make calls		
	2.3 Plan the structure of calls		
	2.4 Identify customers' likely responses and how they can be dealt with		
3. Be able to make telephone calls to customers	3.1 Use telecommunications equipment in accordance with organisational standards		
	3.2 Confirm the identity of customers in line with organisational guidelines		
	3.3 Make the customer aware of the purpose of the call as early as possible		
	3.4 Speak clearly, concisely and politely, using speech and tone to create rapport		
	3.5 Adapt their own communication style to meet customers' needs		
	3.6 Listen actively to what customers are saying to collect as much information as possible		
	3.7 Give clear and concise information that meets customers' needs		
	3.8 Record information in line with organisational guidelines		
	3.9 Complete agreed follow up actions after closing the telephone call		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 11 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.6 Describe different questioning techniques used when dealing with incoming calls	Questioning techniques may include, but is not exclusive to: <ul style="list-style-type: none">• open• closed• verbal• written• probing• clarification



Learner Name:

UNIT REF: CS 12	UNIT TITLE: PROMOTE ADDITIONAL PRODUCTS AND/OR SERVICES TO CUSTOMERS
------------------------	---

Level: 2	Credit Value: 2	GLH: 14
Mapping: CFACSA5		
Rationale: This unit aims to develop the knowledge and skills required to promote additional products and/or services to customers. Upon completion of this unit, learners will be able to promote additional products and/or services to customers.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------

Unit CS 12 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.4 Describe techniques to promote additional products and/or services	Techniques may include but are not exclusive to – <ul style="list-style-type: none"> • Verbal communication • Written communication • Product placement
2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience	The customer experience can be in relation to both internal and external customers



Learner Name:

UNIT REF: CS 13	UNIT TITLE: PROCESS INFORMATION ABOUT CUSTOMERS
------------------------	--

Level: 2	Credit Value: 3	GLH: 14
Mapping: CFACSA6		
Rationale: This unit aims to develop the knowledge and skills required to process customer information. Upon completion of this unit, learners will be able to process customer information.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand how to process customer information	1.1 Describe the functions of customer information systems		
	1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information		
	1.3 Explain different responsibilities and levels of authority for processing customer service information		
	1.4 Explain the reliability of sources of customer information		
	1.5 Explain the validity of customer information		
2. Be able to process customer information	2.1 Record information about customers in line with organisational standards and procedures		
	2.2 Keep customer information up to date		
	2.3 Respond to requests for customer information from authorised people in a timely manner		
	2.4 Retrieve customer information that meets the requirements of the request		
	2.5 Supply customer information in a format appropriate for the recipient		
	2.6 Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 13 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Describe the functions of customer information systems	The description should be in relation to the customer information systems in use at the learner's place of employment.
1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information	The explanation should specifically identify appropriate legislation and regulatory requirements
1.3 Explain different responsibilities and levels of authority for processing customer service information	The learner should be able to explain their own responsibilities and level of authority and have an understanding of when and what to refer to others
1.4 Explain the reliability of sources of customer information	It is expected that the learner will be able to give examples of sources of information and make comparisons about their respective reliability
2.1 Record information about customers in line with organisational standards and procedures	Where possible, adherence to organisational standards, policies and procedures should be confirmed by a line manager or experienced colleague
2.3 Respond to requests for customer information from authorised people in a timely manner	The learner should be able to differentiate between authorised and unauthorised people .
	Timely manner , in line with organisational procedures
2.5 Supply customer information in a format appropriate for the recipient	Where an organisation adopts a standardised format , over which the learner has no control, this AC can be met by 'what if' scenarios.
2.6 Adhere to organisational policies and procedures and legal and ethical requirements when processing customer information	Learners should also have an understanding of <i>which</i> legal requirements affect their activities



Learner Name:

UNIT REF: CS 14	UNIT TITLE: EXCEED CUSTOMER EXPECTATIONS
------------------------	---

Level: 2	Credit Value: 3	GLH: 15
Mapping: CFACSA9		
Rationale: This unit aims to develop the knowledge and skills required to exceed customer expectations. Upon completion of this unit, learners will be able to exceed customer expectations at work.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 14 Assessment Guidance table

<p>Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.</p>	
<p>1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer</p>	<p>Legislation could include;</p> <ul style="list-style-type: none"> • Sale of goods Act 1979 (as amended) • Age restrictive legislation covering for example the sale of: <ul style="list-style-type: none"> - 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 <p>Organisational policies will be specific to the organisation but could include,</p> <ul style="list-style-type: none"> • 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
<p>1.3 Explain the types of actions that customers are likely to perceive as adding value</p>	<p>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</p>
<p>1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer</p>	<p>The service offer is defined as the extent and limits of the customer service that an organisation is offering.</p>
<p>2.4 Make offers to customers within their own authority levels</p>	<p>Offers to customers could include:</p> <ul style="list-style-type: none"> • 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



Learner Name:

UNIT REF: CS 15	UNIT TITLE: DELIVER CUSTOMER SERVICE WHILST WORKING ON CUSTOMERS' PREMISES
------------------------	---

Level: 2	Credit Value: 4	GLH: 20
Mapping: CFACSB3		
Rationale: This unit aims to develop the knowledge and skills required to deliver customer service whilst working on customers' premises. Upon completion of this unit, learners will be able to deliver customer service whilst working on customers' premises.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------

Unit CS 15 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain how to identify possible risks relating to the work to be carried out	Risks are situations or hazards that could cause harm, danger or exposure to danger



Learner Name:

UNIT REF: CS 16	UNIT TITLE: CARRY OUT CUSTOMER SERVICE HANDOVERS
------------------------	---

Level: 2	Credit Value: 3	GLH: 15
Mapping: CFACSB8 & CFACSB16		
Rationale: This unit aims to develop the knowledge and skills required to carry out customer service handovers. Upon completion of this unit, learners will be able to plan and carry out customer service handovers		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand the customer service handover process	1.1 Explain an organisation's customer service handover procedures		
	1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues		
	1.3 Explain why, when and how to set reminders to follow up on actions handed over to others		
	1.4 Explain levels of their own responsibility in the customer service handover process		
2. Be able to plan customer service handovers	2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members		
	2.2 Agree with colleagues when to pass customer service issues from one person to another		
	2.3 Agree methods of information exchange		
3. Be able to carry out customer service handovers	3.1 Explain to customers to whom and why a handover is being made		
	3.2 Exchange information with colleagues in line with organisational procedures		
	3.3 Check that actions required by others following handovers have been completed		
	3.4 Identify further actions when the activities required by others have not been completed		
	3.5 Share feedback with colleagues to make improvements to handover processes		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 16 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain an organisation's customer service handover procedures	Customer service handover is when one member of staff presents the needs of the customer to another member of staff. This could be due to a range of factors, including: <ul style="list-style-type: none">• Shift change• Escalation
2.2 Agree with colleagues when to pass customer service issues from one person to another	Customer service issues may include, but are not exclusive to: <ul style="list-style-type: none">• Complaints• Compliments• Linguistic or cultural barriers
3.4 Identify further actions when the activities required by others have not been completed	Further actions could include but are not exclusive to: <ul style="list-style-type: none">• Identifying why the action has not been completed• Identifying implications to customer• Escalating to line manager or appropriate colleague



Learner Name:

UNIT REF: CS 17	UNIT TITLE: RESOLVE CUSTOMER SERVICE PROBLEMS
------------------------	--

Level: 2	Credit Value: 5	GLH: 22
Mapping: CFACSC3		
Rationale: This unit aims to develop the knowledge and skills required to resolve customer service problems. Upon completion of this unit, learners will be able to resolve customer service problems and manage unresolved customer service problems.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand the resolution of customer service problems	1.1 Describe the organisation's customer service and complaints procedures		
	1.2 Describe techniques to identify customer service problems and their causes		
	1.3 Describe techniques to deal with situations where customers become agitated or angry		
	1.4 Explain the limits of their own authority for resolving customers' problems and making promises		
	1.5 Explain the purpose of encouraging customers to provide feedback		
	1.6 Describe methods used to encourage customers to provide feedback		
2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems		
	2.2 Identify workable options for resolving problems within organisational guidelines		
	2.3 Use the most appropriate method of communication for dealing with customers		
	2.4 Agree with customers the option that best meets their needs and those of the organisation		
	2.5 Keep customers informed of progress		
	2.6 Fulfil promises made to customers during the resolution process		
	2.7 Share customer feedback with others to improve the resolution of customer service problems		
	2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems		
3. Be able to manage unresolved customer service problems	3.1 Explain to customers the reasons why problems cannot be resolved		
	3.2 Refer customers to other sources of help if their problems cannot be resolved		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 17 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Describe techniques to identify customer service problems and their causes	Techniques include, types of questioning used, communicating with both customers and colleagues, active listening
1.3 Describe techniques to deal with situations where customers become agitated or angry	Techniques may relate to learners own communication style, body language, active listening or referral and involvement of others
2.7 Share customer feedback with others to improve the resolution of customer service problems	Others may include colleagues, supervisors, managers
3.2 Refer customers to other sources of help if their problems cannot be resolved	Other sources of help may be internal or external to an organisation i.e. managers or the Citizens Advice Bureau



Learner Name:

UNIT REF: CS 18	UNIT TITLE: DELIVER CUSTOMER SERVICE TO CHALLENGING CUSTOMERS
------------------------	--

Level: 2	Credit Value: 3	GLH: 16
Mapping: CFACSC4		
Rationale: This unit aims to develop the knowledge and skills required to deliver customer service to challenging customers. Upon completion of this unit, learners will be able to deal with challenging customers.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 18 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Describe different types of challenging customers in the customer service environment	Challenging customers may have: <ul style="list-style-type: none">• Problems/ questions• additional needs / requirements• poor communication skills and language barriers or be: <ul style="list-style-type: none">• angry• unreasonable• confused
1.3 Explain behaviours that make it challenging to deal with customers	Behaviours may include but are not limited to: <ul style="list-style-type: none">• aggression• frustration• irritation• confrontation
1.5 Describe techniques to deal with customers' challenging behaviour	Techniques may include but are not limited to: <ul style="list-style-type: none">• active listening• asking questions• showing empathy• using positive body language• taking action
1.6 Explain their own levels of authority for agreeing actions outside the service offer	A service offer defines the extent and limits of the customer service that an organisation is offering



Learner Name:

UNIT REF: CS 19	UNIT TITLE: DEVELOP CUSTOMER RELATIONSHIPS
------------------------	---

Level: 2	Credit Value: 3	GLH: 18
Mapping: CFACSD1		
Rationale: This unit aims to develop the knowledge and skills required to develop customer relationships. Upon completion of this unit, learners will be able to develop relationships with customers.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 19 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.3 Explain how customers' expectations may change over time	Customer expectations are what people think should happen and how they think they should be treated when asking for or receiving customer service
1.5 Explain the limits of their own authority to make alternative service offers to customers	Alternative service offers may include: <ul style="list-style-type: none">• Product replacement or upgrade• Refund• Compensation• Additional support• Extended warranties
1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations	Customer Relationship Management systems may be software applications or paper-based systems to manage customer data
2.1 Give help and information that meets or exceeds customers' expectations	Customer expectations are what people think should happen and how they think they should be treated when asking for or receiving customer service
2.3 Share feedback from customers with others	Others may include colleagues, supervisors, managers



Learner Name:

UNIT REF: CS 20	UNIT TITLE: SUPPORT CUSTOMER SERVICE IMPROVEMENTS
------------------------	--

Level: 2	Credit Value: 3	GLH: 12
Mapping: CFACSD2		
Rationale: This unit aims to develop the knowledge and skills required to support customer service improvements. Upon completion of this unit, learners will be able to identify the potential for improvements to customer service and support the implementation of improvements to customer service.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 20 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Describe different sources of information that may help identify ways of improving customer service	Sources of information may include but are not limited to: <ul style="list-style-type: none">• Customer surveys• Research Studies• Analysis of data
1.2 Describe the constraints on suggesting improvements to customer service	Constraint is a limit or restriction
2.1 Use information from a range of sources to understand the customer experience	Sources of information may include but are not limited to: <ul style="list-style-type: none">• Customer surveys• Research Studies• Analysis of data
3.3 Identify the impact of improvements to customer service and feedback to relevant people	Relevant people may include, but are not limited to: <ul style="list-style-type: none">• Colleagues• Managers• Shareholders



Learner Name:

UNIT REF: CS 21	UNIT TITLE: SUPPORT CUSTOMERS THROUGH REAL-TIME ONLINE CUSTOMER SERVICE
------------------------	--

Level: 2	Credit Value: 3	GLH: 15
Mapping: CFACSD4		
Rationale: This unit aims to develop the knowledge and skills required to support customers through real-time online customer service. Upon completion of this unit, learners will be able to establish the customer service support needed by customers and support online customer service in real-time.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------



Unit CS 21 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain how an organisations online customer service system works	Online customer service systems could refer to: <ul style="list-style-type: none">• Automated online assistants• Instant messages• technical support operator/ technician
3.2 Communicate with customers in terms they can understand	In terms they can understand , in line with organisation's communication guidance, using lay terms rather than jargon



Learner Name:

UNIT REF: CS 22	UNIT TITLE: SUPPORT CUSTOMERS USING SELF-SERVICE EQUIPMENT
------------------------	---

Level: 2	Credit Value: 3	GLH: 18
Mapping: CFACSD7		
Rationale: This unit aims to develop the knowledge and skills required to support customers using self-service equipment. Upon completion of this unit, learners will be able to identify the help needed by customers using self-service equipment and consequently provide help to customers using self-service equipment.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit CS 22 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain how the self-service equipment works	Self-service equipment is a machine that enables a customer to pay for purchases without direct input from the organisation's staff



Learner Name:

UNIT REF: CS 23	UNIT TITLE: USE SOCIAL MEDIA TO DELIVER CUSTOMER SERVICE
------------------------	---

Level: 2	Credit Value: 3	GLH: 18
Mapping: CFACSA19		
Rationale: This unit aims to develop the knowledge and skills required when using social media to deliver customer service. Upon completion of this unit, learners will be able to deal with customers using social media.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit CS 23 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain how different social media platforms can be used for customer service	Social media platforms may include but are not limited to – Twitter, Facebook, Online forums



Learner Name:

UNIT REF: CS 24	UNIT TITLE: PROVIDE POST-TRANSACTION CUSTOMER SERVICE
------------------------	--

Level: 2	Credit Value: 5	GLH: 22
Mapping: None		
Rationale: This unit aims to develop the knowledge and skills required to provide post-transaction customer service. Upon completion of this unit, learners will be able to provide post-transaction customer service.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 24 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain organisational policies and procedures for post-transaction customer service	Policies and procedures explained should be in relation to the organisation where the learner carries out post-transactional customer service (LO2).
1.3 Explain the implications of sales contracts, guarantees and warranties to post transaction customer service	Where possible the explanation should be in relation to sales contracts, guarantees and warranties provided by the organisation .
1.4 Explain how legislation and regulation affect customers' rights	Specific, relevant examples of legislation and regulation should be referred to and explained
2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines	A programme should consist of a series of interventions carried out over time
2.2 Use unplanned opportunities post-transaction to provide customer service	The learner should demonstrate that they are able to <i>recognise</i> unplanned opportunities and take appropriate action to provide customer service over and above what would normally be expected.
2.5 Make recommendations to decision makers to enhance customer satisfaction	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.



Learner Name:

UNIT REF: CS 31	UNIT TITLE: RESOLVE CUSTOMERS' COMPLAINTS
------------------------	--

Level: 3	Credit Value: 4	GLH: 22
Mapping: CFACSC7 & CFACSC8		
Rationale: This unit aims to develop the knowledge and skills required to resolve customers' complaints. Upon completion of this unit, learners will be able to deal with customers' complaints.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 31 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Assess the suitability of a range of monitoring techniques for customers' complaints	Monitoring techniques may include, but are not limited to: <ul style="list-style-type: none">• Record keeping• Customer Contact Systems• E-mails• Letters• Task-specific documents
1.3 Explain negotiating techniques used to resolve customers' complaints	Negotiating techniques may include, but are not exclusive to, <ul style="list-style-type: none">• Compensation• Replacement• Cost reduction• Upgrade• Standard communication• Referral to specialist team
1.4 Explain conflict management techniques used in dealing with upset customers	Conflict management techniques may include, but are not limited to: <ul style="list-style-type: none">• Standard Communication• Referral to specialist team• Explanation at source• 'Second facing' at source
1.5 Explain organisational procedures for dealing with customer complaints	Organisational procedures may include, but are not limited to: <ul style="list-style-type: none">• Explanation at source• 'Second facing' at source• Compensation• Replacement• Cost reduction• Upgrade• Standard Communication• Referral to specialist team



Learner Name:

UNIT REF: CS 32	UNIT TITLE: GATHER, ANALYSE AND INTERPRET CUSTOMER FEEDBACK
------------------------	--

Level: 3	Credit Value: 5	GLH: 24
Mapping: CFACSD12		
Rationale: This unit aims to develop the knowledge and skills required to gather, analyse and interpret customer feedback. Upon completion of this unit, learners will be able to plan the collection of customer feedback, gather customer feedback, and analyse and interpret customer feedback to inform recommendations for improvements.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		
4. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit CS 32 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.3 Explain how to evaluate bias in non-random samples	Bias refers to inclination or prejudice for or against
1.5 Assess the suitability of a range of techniques to analyse customer feedback	Techniques to analyse customer feedback may include, <ul style="list-style-type: none">• Verifying data• Identifying over-arching themes• Highlighting 'quick wins' and 'red alerts'
1.6 Explain techniques used to monitor the quality of data collected	Techniques to monitor the quality of data collected may include, <ul style="list-style-type: none">• sampling• monitoring• review of methods used
1.8 Explain the validation issues associated with customer feedback	A validation issue is something that affects the accuracy of data.
1.9 Explain the importance of anonymising comments from customers who do not wish to be identified	Anonymising comments refers to ensuring that they do not contain information which reveals someone's identity
2.2 Justify the reasons for selecting different data collection methods	Data collection methods could include, <ul style="list-style-type: none">• Surveys• Monitoring social media• Comments boxes• Email/contact forms
3.2 Record data in a way that makes analysis straightforward	Record data In line with organisational procedures
4.1 Use data analysis methods to identify patterns and trends in customer feedback	Data analysis methods (for quantitative and qualitative data), e.g., spreadsheet, software, manual analysis.



Learner Name:

UNIT REF: HSPW2	UNIT TITLE: HEALTH AND SAFETY PROCEDURES IN THE WORKPLACE
------------------------	--

Level: 2	Credit Value: 2	GLH: 16
Mapping: None		
Rationale: None		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Know health and safety procedures in the workplace.	1.1 Define the main responsibilities for health and safety in the workplace of the following: a. employers b. employees		
	1.2 Describe two health and safety laws affecting affecting the workplace.		
	1.3 Define the importance of following health and safety procedures in the workplace.		
	1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.		
2. Be able to carry out tasks with regard to health and safety in the workplace.	2.1 Carry out a risk assessment of a specified workplace activity.		
	2.2 Use equipment or tools safely in the workplace.		
	2.3 Describe how to prevent accidents in the workplace.		
	2.4 Assess how own health and safety practices could be improved.		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit HSPW2 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: B&A 13	UNIT TITLE: MANAGE DIARY SYSTEMS
----------------------------	---

Level: 2	Credit Value: 2	GLH: 12
Mapping: CFABAA431		
Rationale: This unit aims to develop the knowledge and skills required to manage diary systems. Upon completion of this unit, learners will be able to manage diary systems.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit B&A 13 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain the importance of keeping diary systems up to date	Diary systems may include: <ul style="list-style-type: none"> • Paper diaries • Electronic diary systems
2.4 Communicate up-to-date information to everyone involved	Everyone involved should cover attendees and stakeholders attending or affected by the meeting or the subject area
2.6 Maintain the requirements of confidentiality	Requirements of confidentiality should include: <ul style="list-style-type: none"> • Legislation and regulation related to confidentiality • The policies and procedures of the organisation



Learner Name:

UNIT REF: B&A 19	UNIT TITLE: PROVIDE RECEPTION SERVICES
----------------------------	---

Level: 2	Credit Value: 3	GLH: 15
Mapping: CFABAC312		
Rationale: This unit aims to develop the knowledge and skills required to provide reception services. Upon completion of this unit, learners will be able to provide reception services.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit B&A 19 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Explain an organisation's structure and lines of communication	Organisation's structure to include the departments and contact points for referrals
1.5 Explain how to deal with challenging people	Challenging people should cover those who have difficult queries who require specific assistance



Learner Name:

UNIT REF: B&A 27	UNIT TITLE: CONTRIBUTE TO THE ORGANISATION OF AN EVENT
----------------------------	---

Level: 2	Credit Value: 3	GLH: 23
Mapping: CFABAA311		
Rationale: This unit aims to develop the knowledge and skills required to contribute to the organisation of an event. Upon completion of this unit, learners will be able to carry out pre-event actions, set up an event and then carry out post-event actions.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event		
	2.2 Obtain resources within the agreed timescales		
	2.3 Distribute pre-event documentation to delegates in accordance with the event plan		
	2.4 Co-ordinate attendee responses within the agreed timescale		
	2.5 Identify any special requirements of event attendees		
3. 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		
4. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit B&A 27 Assessment Guidance table

<p>Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.</p>	
1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event	<p>The Event may include, but is not exclusive to:</p> <ul style="list-style-type: none"> • A meeting • An announcement • A celebration • A social occasion • A product launch
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.	<p>Resources may include but are not exclusive to:</p> <ul style="list-style-type: none"> • Human resource • Equipment • Materials • Public address systems • Information technology
3.1 Confirm that all identified resources are in place and meet requirements	
2.3 Distribute pre-event documentation to delegates in accordance with the event plan	<p>Pre-event documentation may include, but is not exclusive to:</p> <ul style="list-style-type: none"> • Invitations • Meeting requests • Preparatory notes • Agenda • Menu • Health & safety forms
2.5 Identify any special requirements of event attendees	<p>Special requirements may include, but are not exclusive to:</p> <ul style="list-style-type: none"> • Mobility • Translation or interpretation services • Hearing loops • Special dietary requirements • Allergies • Travel and accommodation bookings • Religious or cultural requirements • Security requirements
3.1 Set up layout and resources in accordance with the event plan	<p>The layout includes the arrangement of furniture and other environmental features</p>
3.3 Behave in a way that maintains organisational values and standards	<p>Organisational values are the general principles or standards of behaviour that are expected within an organisation</p>
	<p>Organisational standards are defined levels of expectation for a specific behaviour set by an organisation</p>



Learner Name:

UNIT REF: B&A 35	UNIT TITLE: BUDDY A COLLEAGUE TO DEVELOP THEIR SKILLS
----------------------------	--

Level: 2	Credit Value: 3	GLH: 19
Mapping: CFACSD5249		
Rationale: This unit aims to develop the knowledge and skills required to buddy a colleague to develop their skills. Upon completion of this unit, learners will be able to develop a plan to buddy a colleague and then put that plan into action by supporting a buddy colleague in carrying out work activities.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit B&A 35 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.2 Explain techniques to give positive feedback and constructive criticism	Techniques may include: <ul style="list-style-type: none">• Choice of Medium used to provide feedback• Giving praise• Choice of Timing, location and approach
1.3 Explain techniques to establish rapport with a buddy	Techniques may include: <ul style="list-style-type: none">• Body language• Listening actively• Speech tone• Understand strengths and weaknesses of each other• Collaboration and partnership working• Build objectives and aims



Learner Name:

UNIT REF: B&A 39	UNIT TITLE: EMPLOYEE RIGHTS AND RESPONSIBILITIES
----------------------------	---

Level: 2	Credit Value: 2	GLH: 16
Mapping: None		
Rationale: This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. Upon completion of this unit, learners will have developed an understanding of the role of organisations and industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit B&A 39 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: M&L 2	UNIT TITLE: DEVELOP WORKING RELATIONSHIPS WITH COLLEAGUES
----------------------------	--

Level: 2	Credit Value: 3	GLH: 19
Mapping: CFAM&LDD1		
Rationale: This unit aims to develop the knowledge and skills required to develop working relationships with colleagues. It introduces learners to the key principles underpinning effective team working. Upon completion of this unit, learners will be able to maintain effective working relationships with colleagues and work collaboratively to resolve problems.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand the principles of effective team working	1.1 Outline the benefits of effective team working		
	1.2 Describe how to give feedback constructively		
	1.3 Explain conflict management techniques that may be used to resolve team conflicts		
	1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising		
	1.5 Explain the importance of warning colleagues of problems and changes that may affect them		
2. Be able to maintain effective working relationships with colleagues	2.1 Recognise the contribution of colleagues to the achievement of team objectives		
	2.2 Treat colleagues with respect, fairness and courtesy		
	2.3 Fulfil agreements made with colleagues		
	2.4 Provide support and constructive feedback to colleagues		
3. Be able to collaborate with colleagues to resolve problems	3.1 Take others' viewpoints into account when making decisions		
	3.2 Take ownership of problems within own level of authority		
	3.3 Take action to minimise disruption to business activities within their own level of authority		
	3.4 Resolve problems within their own level of authority and agreed contribution		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit M&L 2 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.1 Explain conflict management techniques that may be used to resolve team conflicts	Conflict management techniques may include: <ul style="list-style-type: none">• Forcing• Win-win – collaborating• Compromising• Withdrawing• Smoothing



Learner Name:

UNIT REF: M&L 7	UNIT TITLE: PRINCIPLES OF EQUALITY AND DIVERSITY IN THE WORKPLACE
----------------------------	--

Level: 2	Credit Value: 2	GLH: 10
Mapping: CFAM&LBA7		
Rationale: This unit aims to develop knowledge and understanding regarding equality and diversity, and will introduce learners to the key principles underpinning equality and diversity in the workplace. Upon completion of this unit, learners will understand the implications of equality legislation and will understand organisational standards and expectations for equality and diversity in the workplace.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand the implications of equality legislation	1.1 Define the concept 'equality and diversity'		
	1.2 Describe the legal requirements for equality of opportunity		
	1.3 Describe the role and powers of organisations responsible for equality		
	1.4 Explain the benefits of equal opportunities and diversity		
	1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation		
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace		
	2.2 Describe their own responsibilities for equality and diversity in the workplace		
	2.3 Describe behaviours that support equality, diversity and inclusion in the workplace		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit M&L 7 Assessment Guidance table

Assessment Guidance is provided below for some Assessment Criteria. The purpose of this is to clarify and define elements of the Assessment Criteria as required. Assessment Guidance provided is for example purposes only and is not intended to be exhaustive.	
1.4 Explain the benefits of equal opportunities and diversity	Benefits include those relating to the employer, employees and customers
1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation	Consequences could include those which are legal, reputational and relating to profits
	Equality Legislation will include but is not exclusive to: <ul style="list-style-type: none"> • Equality Act 2010



Learner Name:

UNIT REF: SAL2-7	UNIT TITLE: PROCESSING SALES ORDERS
----------------------------	--

Level: 2	Credit Value: 2	GLH: 17
Mapping: None		
Rationale: The aim of this unit is to provide the skill and knowledge needed to process orders and payments.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------



Unit SAL2-7 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: SAL2-13	UNIT TITLE: MEETING CUSTOMERS' AFTER SALES NEEDS
-----------------------------	---

Level: 2	Credit Value: 3	GLH: 14
Mapping: None		
Rationale: This unit aims to provide the knowledge of how after-sales service is provided in a way that meets your customer's needs.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Be able to investigate customer after sales needs	1.1 Establish the nature of customers' after sales needs		
	1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times		
2. Be able to handle customers' after sales needs	2.1 Deal with customers' after sales needs following organisational customer service standards and procedures		
	2.2 Balance customers' needs with those of the organisation		
	2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority		
	2.4 Fulfil commitments made to customers in accordance with quality and customer service standards		
	2.5 Record commitments made to customers		
3. Be able to review the after sales process	3.1 Obtain customers' comments on service reliability from customers		
	3.2 Analyse and report the findings to the relevant person in the organisation		
	3.3 Make recommendations for improvements to after sales service provision in the light of customer feedback		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit SAL2-13 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: SAL2-14	UNIT TITLE: HANDLING OBJECTIONS AND CLOSING SALES
-----------------------------	--

Level: 2	Credit Value: 3	GLH: 22
Mapping: None		
Rationale: This unit aims to develop knowledge and skills in handling and overcoming sales objections in order to be able to close the sale.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Understand how to handle sales objections	1.1 Explain the difference between standard and non-standard sales objections		
	1.2 Explain how to clarify objections and identify potential sales opportunities from them		
	1.3 Describe how to use questioning techniques to explore and resolve customer issues		
	1.4 Explain how to empathise with and reassure the customer		
	1.5 Explain the difference between hypothetical and real objections		
	1.6 Explain how knowledge of products and services can be used to answer objections		
	1.7 Explain how competitor activity may affect the potential sale		
	1.8 Describe how industry/sector pricing structures may have an impact on sales objections		
	1.9 Explain the scope of authority and responsibility when dealing with objections		
	1.10 State who to go to when in need of support to overcome objections		
2. Understand how to close the sale	2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale		
	2.2 Explain how to perform a trial close		
	2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale		
	2.4 Explain potential barriers to closing the sale		
	2.5 Explain a range of ways to close the sale		



LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
3. Be able to handle objections	3.1 Clarify the nature and extent of objections		
	3.2 Explain to the customer the concessions available within the scope of authority		
	3.3 Follow organisational procedures for dealing with objections		
	3.4 Promote the benefits of products and/or services to overcome objections		
	3.5 Use testimonials to overcome objections		
	3.6 Refer to those in authority when dealing with objections outside the scope of own authority		
4. Be able to close the sale	4.1 Perform a trial close and ask for the order when objections have been met		
	4.2 Make use of add-on, up-selling or cross-selling opportunities		
	4.3 Follow organisational procedures for accepting confirmation of an order		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit SAL2-14 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: CC38	UNIT TITLE: DEAL WITH INCIDENTS THROUGH A CONTACT CENTRE
-----------------------	---

Level: 2	Credit Value: 7	GLH: 40
Mapping: N/A		
Rationale: This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. Be able to deal with incidents through a contact centre	1.1 Respond to incoming calls in a calm and professional manner		
	1.2 Maintain control of the conversation		
	1.3 Record the contact and information in an incident log in accordance with organisational procedures		
	1.4 Assess and prioritise reported incidents in accordance with organisational procedures		
	1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures		
	1.6 Provide information, advice and support in response to requests in accordance with organisational procedures		
	1.7 Escalate incident responses in accordance with organisational procedures		
2 Be able to use contact centre communications systems to deploy incident management resources	2.1 Communicate with external organisations in accordance with organisational procedures		
	2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident		
	2.3 Use agreed conventions of wording, style and approach appropriate for different communication media		



LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
3. Understand how to deal with incidents in a contact centre	3.1 Describe the incident management services offered by the contact centre		
	3.2 Describe the impact of regulation or legislation on incident management		
	3.3 Describe the purpose and use of decision trees		
	3.4 Describe how to determine the appropriate allocation of resources to incidents		
	3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response		
	3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident		
	3.7 Describe standard wording and codes used by the organisation when dealing with incident management		
	3.8 Describe the type and extent of resources available for deployment in incident management		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit CC38 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: CC19	UNIT TITLE: CARRY OUT DIRECT SALES ACTIVITIES IN A CONTACT CENTRE
-----------------------	--

Level: 2	Credit Value: 5	GLH: 15
Mapping: None		
Rationale: This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.		

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
The Learner will:	The Learner can:		
1. Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales		
	1.2 Obtain from customers sufficient information to support direct sales activities		
	1.3 Create sales opportunities by making links between information provided by customers and products and/or services		
	1.4 Find potential new customers for products and/or services		
2. Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures		
	2.2 Check customers' wishes and needs		
	2.3 Identify possible matches with products and/or services from information provided by customers		
	2.4 Explain to customers the features and benefits of products and/or services for sale		
	2.5 Adapt their sales approach and style to meet customer preferences		
	2.6 Maximise opportunities for cross-selling and up-selling		
	2.7 Complete the authorisation or payment in accordance with organisational procedures		
3 Be able to keep direct sales records within a contact centre	3.1 Identify the information about customers, products and/or services that should be recorded during the sales process		
	3.2 Record customer, product and/or service information in accordance with organisational procedures		
4. Be able to comply with regulations and legislation during direct sales in contact centre	4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre		
	4.2 Ensure compliance with regulations during direct selling through a contact centre		



LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
5. Understand how to conduct sales activities in a contact centre	5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre		
	5.2 Describe the organisational policies and procedures for direct sales through a contact centre		
	5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities		
	5.4 Describe the common objections and questions raised by customers during direct selling		
	5.5 Explain how to identify cross-selling and up-selling opportunities		
	5.6 Describe different methods of researching potential new customers		
	5.7 Explain how to retrieve information from organisational sales records		
	5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit CC19 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: B&A 42	UNIT TITLE: NEGOTIATE IN A BUSINESS ENVIRONMENT
----------------------------	--

Level: 3	Credit Value: 4	GLH: 18
Mapping: CFABAG124		
Rationale: This unit aims to develop the knowledge and skills required to negotiate in a business environment and it introduces learners to the principles underpinning negotiation. Upon completion of this unit, learners will be able to prepare for business negotiations and carry out business negotiations.		

LEARNING OUTCOMES The Learner will:	ASSESSMENT CRITERIA The Learner can:	Ref No	Date
1. 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		
2. 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		
3. 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		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit B&A 42 Assessment Guidance table

No assessment guidance available for this unit.



Learner Name:

UNIT REF: BS2	UNIT TITLE: BESPOKE SOFTWARE
----------------------	-------------------------------------

Level: 2	Credit Value: 3	GLH: 20
Mapping: None		
Rationale: None		

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
The Learner will:	The Learner can:		
1. Input and combine information using bespoke applications	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 of different forms or from different sources within the software		
	1.3 Respond appropriately to data entry error messages		
2. Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively		
	2.2 Select and use appropriate structures and/or layouts to organise information		
	2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available		
3. Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information		
	3.2 Check information meets needs, using IT tools and making corrections as necessary		
	3.3 Select and use appropriate methods to present information		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
----------------------------	----------------	--------------

Unit BS2 Assessment Guidance table

No assessment guidance available for this unit.



ASSESSOR COMMENTS AND FEEDBACK

Assessor's should comment and give feedback each time they observe a learner or meet with a learner to review evidence. Therefore each time an observation or review of evidence takes place the assessor should enter the date and the evidence number, and make appropriate comments and feedback. Please see the guide below for the type of comments that can be included.

The following provides guidance as to the type of comments that can be included below.

1. A description of the various activities being carried out by the learner for each unit.
2. How the learner has met the Learning Outcomes for each unit.
3. Questions that you have asked, not demonstrated through performance.
4. Questions you have asked to ascertain essential knowledge.
5. Issues arising from assessment.
6. Identification of good or poor performance.
7. Any action required to further develop the learner's knowledge and skills.
8. Constructive feedback to the learner.

Date	Evidence Ref. No.	Assessor Comments: Please ensure your comments are concise.



ASSESSOR COMMENTS AND FEEDBACK

CONTINUATION SHEET

Date	Evidence Ref. No.	Assessor Comments: Please ensure your comments are concise.