

# **Qualification specification**

**NCFE Level 2 Diploma for Customer Service  
Practitioners  
QN: 603/5681/9**

# Contents

<b>Summary of changes</b>	<b>3</b>
<b>Section 1</b>	<b>4</b>
<b>Introduction</b>	<b>5</b>
Support Handbook	5
<b>Qualification summary</b>	<b>6</b>
Entry guidance	8
Achieving this qualification	8
Mapping to the Customer Service Practitioner Apprenticeship Standard	8
Behaviours mapping	8
Units	9
How the qualification is assessed	10
Internal assessment	10
<b>Section 2</b>	<b>11</b>
<b>Unit content and assessment guidance</b>	<b>12</b>
Unit 01 Understand the principles of delivering customer service (F/618/0495)	13
Unit 02 Understand an organisation and its customers (J/618/0496)	16
Unit 03 Understand and deliver high quality customer experience (L/618/0497)	20
Unit 04 Effectively communicate with a range of customers (R/618/0498)	23
Unit 05 Support and improve customer service (Y/618/0499)	27
Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)	30
<b>Section 3</b>	<b>33</b>
<b>Explanation of terms</b>	<b>34</b>
<b>Section 4</b>	<b>36</b>
<b>Additional information</b>	<b>37</b>
Resource requirements	37
Support for learners	37
Learner's Evidence Tracking Log (LETL)	37
Learning resources	37
Contact us	38

## Summary of changes

This document summarises the changes to this qualification specification since the last version (Version 1.0 May 2020). Please check the NCFE website for the most recent version.

Version	Publication date	Summary of amendments
v1.0	May 2020	First publication
v1.1	June 2022	<p>Further information added to the <a href="#">how the qualification is assessed</a> section to confirm that unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.</p> <p>Information added to the <a href="#">entry guidance</a> section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.</p> <p>Information added to the <a href="#">support handbook</a> section about how to access support handbooks.</p> <p>GDPR Legislation updated to <a href="#">UK General Data Protection Regulation (UK GDPR)</a>.</p>

# Section 1

## About this qualification

## Introduction

This Qualification Specification contains details of all the units and assessments required to complete this qualification.

To ensure that you are using the most up-to-date version of this Qualification Specification, please check the version number and date in the page footer against that of the Qualification Specification on the NCFE website.

If you advertise this qualification using a different or shortened name, you must ensure that learners are aware that their final certificate will state the full regulated qualification title.

Reproduction by **approved** centres is permissible for internal use under the following conditions:

- you may copy and paste any material from this document; however, we do not accept any liability for any incomplete or inaccurate copying and subsequent use of this information
- the use of PDF versions of our support materials on the NCFE website will ensure that correct and up-to-date information is provided to learners
- any photographs in this publication are either our exclusive property or used under licence from a third-party. They are protected under copyright law and cannot be reproduced, copied or manipulated in any form. This includes the use of any image or part of an image in individual or group projects and assessment materials. All images have a signed model release
- the resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

---

## Support Handbook

This qualification specification must be used alongside the mandatory support handbook which can be found on the NCFE website. This contains additional supporting information to help with planning, delivery and assessment.

This qualification specification contains all the qualification-specific information you will need that is not covered in the support handbook.

---

<b>Qualification summary</b>	
<b>Qualification title</b>	NCFE Level 2 Diploma for Customer Service Practitioners
<b>Qualification number (QN)</b>	603/5681/9
<b>Aim reference</b>	60356819
<b>Total Qualification Time (TQT)</b>	375
<b>Guided Learning Hours (GLH)</b>	205
<b>Minimum age</b>	16
<b>Qualification purpose</b>	<p>This qualification is designed to provide learners with the knowledge, skills and understanding to work in a customer service role within any sector or industry.</p> <p>The qualification will support learners completing the Customer Service Practitioner Apprenticeship Standard. The qualification can also be used as a stand-alone qualification for those learners wishing to gain a qualification in customer service.</p>
<b>Aims and objectives</b>	<p>The qualification aims to:</p> <ul style="list-style-type: none"> <li>• focus on the study of customer service within any sector or industry</li> <li>• provide opportunities to develop further knowledge and skills for those working in a customer service role.</li> </ul> <p>The objectives of this qualification are to:</p> <ul style="list-style-type: none"> <li>• understand customer service and the legislation that affects its delivery</li> <li>• understand the purpose, aim and values of an organisation</li> <li>• understand how to create a positive customer experience and support customers on an organisation's products and services</li> <li>• communicate effectively with customers through various media, including dealing with complaints, conflict and challenge</li> <li>• support and improve customer service</li> <li>• understand and develop your role within the team and the organisation.</li> </ul>
<b>Real work environment (RWE) requirement/ recommendation</b>	Where the assessment requirements for a unit allow, it is essential that organisations wishing to operate a RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This is often used to support simulation.

<b>Rules of combination</b>	To be awarded this qualification, learners are required to successfully complete 6 mandatory units.
<b>Assessment method</b>	Internally assessed and externally quality assured portfolio of evidence.
<b>Apprenticeship frameworks/standards</b>	This qualification will support learners completing the Customer Service Practitioner Apprenticeship Standard.
<b>Progression</b>	Learners who achieve this qualification could progress to: <ul style="list-style-type: none"> <li>• Level 3 Certificate in Principles of Customer Service</li> <li>• Level 3 Diploma for Business Administrators</li> <li>• Level 3 Diploma in Management Skills and Knowledge</li> </ul>
<b>Regulation information</b>	This is a regulated qualification. The regulated number for this qualification is 603/5681/9.
<b>Funding</b>	This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

## Entry guidance

This qualification is designed for learners who are working, or would like to work, in a customer service role within any sector or industry. It is ideal for those who are new to the role or who have been working in a customer service role for a short period of time.

Registration is at the discretion of the centre, in accordance with equality legislation, and should be made on the Portal. However, learners should be aged 16 or above to undertake this qualification.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the learning outcomes and comply with the relevant literacy, numeracy and health and safety aspects of this qualification.

Learners registered on this qualification should not undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

---

## Achieving this qualification

To be awarded this qualification, learners are required to successfully complete 6 mandatory units.

Please refer to the list of units on the following page or the unit summaries in Section 2 for further information.

To achieve this qualification, learners must successfully demonstrate their achievement of all learning outcomes of the units as detailed in this Qualification Specification. A partial certificate may be requested for learners who do not achieve their full qualification but have achieved at least one whole unit.

---

## Mapping to the Customer Service Practitioner Apprenticeship Standard

A mapping document is available on the Qualifications page on the NCFE website showing which units and assessment criteria of the Level 2 Diploma for Customer Service Practitioners map to the Customer Service Practitioner Apprenticeship Standard.

---

## Behaviours mapping

The behaviours requirements within the Customer Service Practitioner Apprenticeship Standard are not assessed as part of this qualification; however, learners may have the opportunity to develop and evidence the behaviours throughout the units.

---



## Units

To make cross-referencing assessment and quality assurance easier, we have used a sequential numbering system in this document for each unit.

The regulated unit number is indicated in brackets for each unit (eg M/100/7116) within Section 2.



Knowledge only units are indicated by a star. If a unit is not marked with a star, it is a skills unit or contains a mix of knowledge and skills.

## Mandatory units

	Unit number	Regulated unit number	Unit title	Level	GLH
★	Unit 01	F/618/0495	Understand the principles of delivering customer service	2	25
★	Unit 02	J/618/0496	Understand an organisation and its customers	2	40
	Unit 03	L/618/0497	Understand and deliver high quality customer experience	2	40
	Unit 04	R/618/0498	Effectively communicate with a range of customers	2	45
	Unit 05	Y/618/0499	Support and improve customer service	2	20
	Unit 06	F/618/0500	Understand and develop your role within the team and the organisation	2	35

The units above may be available as stand-alone unit programmes. Please visit our website for further information.

## How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

This qualification is internally assessed and externally quality assured.

The assessment consists of one component:

- an internally assessed portfolio of evidence which is assessed by centre staff and externally quality assured by NCFE.

Learners must be successful in **this** component to gain the Level 2 Diploma for Customer Service Practitioners.

Unless stated otherwise in this qualification specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

## Internal assessment

Each learner must create a portfolio of evidence generated from appropriate assessment tasks, which demonstrates achievement of all the learning outcomes associated with each unit. On completion of each unit, learners must declare that the work produced is their own and the Assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in Section 2.

Internally assessed work should be completed by the learner in accordance with the Qualification Specification.

The Tutor must be satisfied that the work produced is the learner's own.

A centre may choose to create their own internal assessment tasks. The tasks should:

- be accessible and lead to objective assessment judgements
- permit and encourage authentic activities where the learner's own work can be clearly judged
- refer to Course File Documents on the NCFE website.

## Supervision of learners and your role as an Assessor

Guidance on how to administer the internal assessment and the support you provide to learners can be found on the NCFE website.

## Feedback to learners

Guidance on providing feedback during teaching and learning and each stage of the assessment can be found on the NCFE website.

---

# Section 2

## Unit content and assessment guidance

### **Unit content and assessment guidance**

This section provides details of the structure and content of this qualification.

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes are covered and if the evidence generated can be internally and externally quality assured. For approval of methods of internal assessment other than portfolio building, please contact our Quality Assurance team.

The Explanation of terms explains how the terms used in the unit content are applied to this qualification. This document can be found in Section 3.

For further information or guidance about this qualification, please contact our Customer Support team.

---

**Unit 01 Understand the principles of delivering customer service (F/618/0495)**

<b>Unit summary</b>	This unit provides learners with an understanding of customer service and the legislation that affects its delivery.
<b>Guided learning hours</b>	25
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Understand customer service

**The learner can:**

- 1.1 Explain the purpose and scope of customer service
- 1.2 Describe the stages of the **customer journey**
- 1.3 Explain the importance of delivering consistently high quality customer service
- 1.4 Explain barriers to providing effective customer service
- 1.5 Explain the effects on the organisation of poor customer service

**Key word(s)**

**Customer journey:** awareness, engagement, conversion, retention and loyalty

**Assessment guidance**

<b>Delivery and assessment</b>
1.1 The learner must explain why an organisation needs to provide customer service and where in their organisation customer service is delivered.
1.2 The learner must describe each stage of a customer journey in relation to their own organisation.
1.3 The learner should explain the importance of delivering consistently high quality customer service in different areas of the organisation (eg marketing, technical support, after sales service). They should consider the positive impact of delivering high quality customer service.
1.4 The learner should explain situations and circumstances that can prevent the delivery of effective customer service. This could include technical problems, availability of stock, profitability, staffing issues etc.
1.5 The learner should explain the consequences and impact on the organisation of poor customer service. This could include increased customer complaints, loss of customers, negative impact on brand reputation, decrease in sales etc and the learner should explain this in the context of their own organisation, giving examples.
The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

**Types of evidence**

Evidence could include:

- written answers
- oral questioning
- professional discussion.

**Learning outcome 2****The learner will:**

- 2 Know the legislation and regulations that apply to customer service

**The learner can:**

- 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 equality legislation affects customer service
- 2.4 Describe how legislation affects the use and storage of customer information
- 2.5 Describe their responsibilities in meeting the requirements of **legislation** when delivering customer service and how to apply this in their role

**Key word(s)**

**Legislation:** should include a range of legislation and regulations such as health and safety, equality and diversity, data protection, consumer protection, consumer rights, Consumer Credit Act 1974, safeguarding, regulations relating to own specific industry

**Assessment guidance****Delivery and assessment**

- 2.1 The learner should, where possible, relate this to their own organisation and describe how consumer-related legislation and regulations affect how they deliver customer service. This should include reference to at least 3 pieces of legislation and/or regulation and could include the Consumer Rights Act 2015, Trade Descriptions Act 1968, Consumer Protection Act 1987, and Consumer Credit Act 1974.
- 2.2 The learner should consider how health, safety and environmental legislation affects customer service at different stages of the customer journey. This could include consideration of face-to-face communications with customers, quality of goods, packaging and returned goods.
- 2.3 Evidence should include reference to discrimination, the equality policy of the learner's own organisation and the protected characteristics identified in equality legislation. They should explain how each of these influences an approach to dealing with customers.
- 2.4 Evidence must reference the Data Protection Act 2018 and the UK General Data Protection Regulation (UK GDPR), including the learner's own organisation's data protection policy. They should give examples of how this influences the way their own organisation uses and stores customer information, giving examples.

2.5 The learner should describe their responsibilities in meeting the requirements of at least 4 different pieces of legislation for the customer service aspects of their own role and say how they can put this into practice.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

#### **Types of evidence**

Evidence could include:

- written answers
- oral questioning
- professional discussion.

**Unit 02 Understand an organisation and its customers (J/618/0496)**

<b>Unit summary</b>	In this unit, the learner will examine an organisation's purpose and image as well as understanding how internal policies and procedures guide the delivery of customer service.
<b>Guided learning hours</b>	40
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Understand the purpose, aim and values of an organisation and identify its customers

**The learner can:**

- 1.1 Outline the aim and purpose of the organisation
- 1.2 Explain the distinctions between internal and external customers
- 1.3 Identify the **customers** of the organisation
- 1.4 Identify the core values of the organisation and how these are portrayed to customers
- 1.5 Describe how the core values link to the culture of the organisation

**Key word(s)**

**Customers:** internal/external

**Assessment guidance****Delivery and assessment**

- 1.1 The learner should outline what their organisation serves to do and give its key business aims.
- 1.2 The learner must show that they understand the difference between internal and external customers.
- 1.3 The learner should be able to scope the customers of their own organisation and identify whether they are internal or external.
- 1.4 The learner must be able to identify the core values of their organisation, even if they are not written, and give examples of how these values are communicated to customers. This could include examples of what the organisation expects in terms of dress code, communication style or solving customer problems.
- 1.5 The learner must show that they understand the service culture of their organisation and describe how this culture is supported by the core values identified in 1.4.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.



**Types of evidence**

Evidence could include:

- written answers
- oral questioning
- annotated products
- professional discussion.

**Learning outcome 2****The learner will:**

- 2 Understand the importance of customer service to a brand

**The learner can:**

- 2.1 Describe the products or services that are available from the organisation  
 2.2 Explain the importance of brand to an organisation  
 2.3 Describe the brand promise of the organisation  
 2.4 Outline their own role in ensuring that a brand promise is delivered

**Assessment guidance****Delivery and assessment**

- 2.1 In their description, the learner must show that they have a good understanding of the products or services that are offered by their organisation.
- 2.2 The learner must show that they understand what a brand is and explain how a strong brand can support an organisation. This could include reference to a company name, logo, marketing materials etc.
- 2.3 The learner should describe the experience or promise that their organisation wants its customers to enjoy.
- 2.4 The learner must outline how their role will support the delivery of the brand promise described in 2.3, giving examples.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

**Types of evidence**

Evidence could include:

- written answers
- oral questioning
- annotated product
- professional discussion.

### Learning outcome 3

#### The learner will:

- 3 Know an organisation's internal policies and procedures that apply to customer service

#### The learner can:

- 3.1 Outline the organisation's policies and procedures for handling customers throughout the **customer journey**
- 3.2 Describe the key features of the organisation's customer complaints procedure
- 3.3 Explain the organisation's procedures and standards of behaviour for dealing with challenging customers
- 3.4 Describe the uses of **digital media** for communicating with customers within the organisation
- 3.5 Describe the organisation's guidelines for the use of **digital media**

#### Key word(s)

**Customer journey:** awareness, engagement, conversion, retention and loyalty

**Digital media:** could include email, social media, online chat, organisation's web pages and other software

#### Assessment guidance

Delivery and assessment
<p>3.1 The learner should outline the processes that the organisation has in place for dealing with customers for each stage of the customer journey. If there is no written policy in place, or the learner themselves is not involved at each stage, they should still be able to outline what is expected of their employees.</p>
<p>3.2 The learner should describe the main points of how their organisation deals with a complaint. They could consider written complaints, verbal complaints, negative reviews on social media, employee hierarchy for dealing with complaints, returns and refunds.</p>
<p>3.3 The learner should explain how the organisation expects employees to deal with a challenging customer. Different types of challenging customer should be considered (eg argumentative, intimidating, impatient, specific language or cultural needs, disability needs) and in different contexts (eg verbal or physical abuse, impossible demands, groups of customers). They should explain the standards of behaviour to which they should adhere and when to seek support from others in the organisation.</p>
<p>3.4 The learner should describe which aspects of digital media are used in their organisation for communicating with customers at each stage of the customer journey.</p>
<p>3.5 The learner should know the protocol that their organisation expects them to follow when communicating with customers through digital media. This could include guidelines on appropriate language and style, confidentiality, use of images, privacy settings, appropriate/inappropriate content and greeting/signature.</p>

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

**Types of evidence**

Evidence could include:

- written answers
- oral questioning
- annotated products
- professional discussion.

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

<b>Unit summary</b>	In this unit, learners show understanding of the components of a high-quality customer experience and how they can deliver positive outcomes for both an organisation and its customers.
<b>Guided learning hours</b>	40
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Understand how to create a positive customer experience

**The learner can:**

- 1.1 Explain what is meant by a customer-focused experience
- 1.2 Explain how establishing the facts enables them to create a customer-focused experience
- 1.3 Explain the difference between customers' expectations and needs and the service offer
- 1.4 Describe how to manage customers' expectations
- 1.5 Explain the importance of following up actions and keeping promises when delivering customer service
- 1.6 Explain how they take responsibility for meeting customer needs and expectations throughout the **customer journey**
- 1.7 Describe why it is important to build trust with customers and how this can be achieved
- 1.8 Provide a personalised customer service experience to a range of customers with differing needs
- 1.9 Keep customers informed of progress while resolving issues
- 1.10 Take action to ensure that customers are satisfied before closing **dialogue**

**Key word(s)**

**Customer journey:** awareness, engagement, conversion, retention and loyalty

**Dialogue:** can be verbal or written

**Assessment guidance****Delivery and assessment**

- 1.1 The learner should support their explanation with examples of what makes a customer-focused experience.
- 1.2 The learner should identify the types of facts that are needed from the customer and explain how establishing the facts supports the ability to create a customer-focused experience, giving examples. In their explanation, they could consider the problems that could occur if the facts were not established.
- 1.3 The learner should consider what their organisation is able to offer in terms of customer service and give examples of how this may not meet what a customer expects or needs.

- 1.4 The learner should describe at least 3 strategies and say how they can be effective. Strategies could include discuss solutions, prioritise the customer's needs, communicate effectively, be open and transparent, remain realistic and provide timescales.
- 1.5 Following up actions and keeping promises can be in a variety of forms, either written or verbal. The learner should consider the impact on the customer relationship with the organisation if these actions or promises are not fulfilled.
- 1.6 The learner must look at their own role and explain how they personally take responsibility for meeting customer needs and expectations, at all points of the customer journey. If there is a stage that they are not directly involved in, they must explain their indirect involvement and what their organisation expects of them as an employee.
- 1.7 The learner must describe why it is important that a customer has confidence in what they are being told and must give at least 2 examples of how this can be achieved.
- 1.8 The learner must demonstrate that they have provided a personalised customer service to at least 3 customers. Differing needs could be the different outcomes required by each customer, or it could be that each has specific needs in terms of disability, language or other special requirements.
- 1.9 Evidence should be drawn from customer issues that need to be resolved over time in order to demonstrate that the learner has kept the customer up-to-date with progress.
- 1.10 The learner must show how they have effectively closed a dialogue with a customer (either verbal or written) and ensured that the customer was satisfied at the conclusion.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

#### **Types of evidence**

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products
- professional discussion.

## Learning outcome 2

### The learner will:

- 2 Be able to support customers with an organisation's products and services

### The learner can:

- 2.1 Keep up-to-date with the products and/or services that the organisation offers  
 2.2 Provide information to the customer on the features and benefits of different products or services  
 2.3 Provide alternative solutions when the customer needs or expectations cannot be met  
 2.4 Agree a solution that balances customer satisfaction and organisational needs  
 2.5 Deliver customer service in line with organisational policies and procedures

### Assessment guidance

Delivery and assessment
<p>2.1 The learner must show what they have done to keep up-to-date with the products and/or services that the organisation offers. This could include participating in training, mentoring, personal research, asking questions, reading organisation documentation or email updates etc. They should identify how the activity improved their knowledge and understanding of the product or service.</p> <p>2.2 The learner should be able to demonstrate a good level of understanding of the products or services and should provide information to the customer on at least 2 of the organisation's products or services.</p> <p>2.3 When the customer needs or expectations cannot be met, the learner must provide at least 2 alternative solutions to the customer.</p> <p>2.4 The learner must agree a solution which ensures that the customer is satisfied but is within the scope of what the organisation is prepared to offer. It is expected that a combination of high quality customer service and knowledge of the organisation will agree a solution to the satisfaction of both parties.</p> <p>2.5 The learner must demonstrate that they have followed the organisation's policies and procedures in delivering customer service. The evidence must show examples of how this was achieved.</p> <p>The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.</p>
Types of evidence
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• reflective account</li> <li>• observation</li> <li>• witness testimony</li> <li>• annotated products</li> <li>• professional discussion.</li> </ul>

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

<b>Unit summary</b>	This unit looks at how to communicate with customers effectively through various media, including dealing with complaints, conflict and challenge.
<b>Guided learning hours</b>	45
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Be able to engage effectively with customers

**The learner can:**

- 1.1 Describe different **questioning techniques** that can be used when communicating with customers
- 1.2 Use **questioning techniques** to gather information about the customer's needs
- 1.3 Describe a range of effective listening skills
- 1.4 Describe how the tone of voice and body language can show how a customer may be feeling
- 1.5 Use **effective techniques** to build rapport with a customer and achieve a positive outcome
- 1.6 Confirm understanding with the customer in an **appropriate way**
- 1.7 Use an appropriate tone of voice in face-to-face communication, written communication and **digital communication** which reflects the organisation's brand
- 1.8 Select the most **appropriate method of communication** for dealing with customers

**Key word(s)**

**Questioning techniques:** closed, open, probing, written, verbal, clarification

**Effective techniques:** questioning skills, listening skills, appropriate body language and tone, empathic responses

**Appropriate way:** summarising language in face-to-face communication, reinforcement techniques during non-facing customer interactions

**Digital communication:** could include email, social media, online chat, organisation's web pages and other software

**Appropriate method of communication:** face-to-face and/or in writing

**Assessment guidance**

<b>Delivery and assessment</b>
1.1 The learner must describe at least 3 questioning techniques and give examples of how and when they can be used.
1.2 The learner must show that they have used at least 3 questioning techniques when gathering information from customers. They must demonstrate questioning techniques with at least 2 different customers. These can be either verbal or written.

- 1.3 The description of listening skills will include both verbal and non-verbal skills and state why they are effective. These could include the use of a listener's body language (eg open posture, nodding, eye contact), making notes, asking questions, paraphrasing, mirroring, remaining calm, being attentive, concentrating, showing interest, not interrupting and giving positive feedback. The learner should describe at least 5 skills and describe the positive effect that these can have.
- 1.4 The learner should describe what can be interpreted from the tone of voice and body language of the customer in terms of how they are feeling. They should identify at least 5 behaviours and describe what each of them may signal.
- 1.5 The learner should demonstrate all the techniques identified in the key words with at least one customer, which shows how rapport was achieved and resulted in a positive outcome for both parties.
- 1.6 The learner must demonstrate that they have confirmed that the customer has understood what has been communicated either verbally or in writing, using summarising language or reinforcement techniques.
- 1.7 The learner should ensure that their tone of voice is in keeping with the brand of the organisation on at least 3 occasions – one in a face-to-face communication (with an internal or external customer), one in written communication and one communication using digital media. It should be clear that each communication has reflected the brand. This could be through the use of corporate branding, pre-defined organisational phrases and vocabulary, images, promises and sign off.
- 1.8 This will depend upon the customer service role of the learner. Some face-to-face communications may require confirmation in writing, whilst others may require a non-standard approach due to the customer's individual needs. The learner must demonstrate an appropriate choice of communication method on at least 2 occasions.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

### **Types of evidence**

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products
- professional discussion.



## Learning outcome 2

### The learner will:

- 2 Be able to handle customer complaints, conflict and challenge

### The learner can:

- 2.1 Describe the specific needs of different customers, including those protected under current equality legislation
- 2.2 Describe different types of challenging customers in the customer service environment
- 2.3 Demonstrate patience and calmness when dealing with complaints or challenging situations
- 2.4 Adapt own communication style to meet customers' needs and expectations
- 2.5 Show, through the use of communication behaviours, that they understand the customer's point of view
- 2.6 Adapt approach in accordance with customers' changing behaviour
- 2.7 Use **techniques** to manage service recovery
- 2.8 Refer issues to another member of the team as required, passing on necessary information in order to resolve a customer service issue
- 2.9 Refer customers to other sources of help if their problems cannot be resolved
- 2.10 Maintain organisational standards of behaviour and communication when interacting with customers

### Key word(s)

**Techniques:** could include apologising, problem-solving, timely management of issues, displaying positive and professional behaviour

### Assessment guidance

#### Delivery and assessment

- 2.1 The learner should describe at least 7 specific needs that customers may have and how this may affect customer service. They must include at least 5 of the protected characteristics identified under current equality law (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation).
- 2.2 Challenging customers could include those that are displaying challenging behaviour through their tone or body language (eg argumentative, intimidating, threatening or impatient), those with specific language/cultural needs or disability needs, those making impossible demands, and those presenting themselves as a group. Learners must describe at least 3 types of customers and justify why these can be a challenge.
- 2.3 The learner must show that they can remain calm in the face of a complaint or challenging situation (examples of challenging customers are in 2.2; complaints can be those face-to-face or in writing). The evidence must show the context. They should evidence this for at least 2 different customers.
- 2.4 Communication style could be verbal, written or digital, formal or informal, and passive or assertive. The learner should evidence that they can adapt their style where it is required in order to ensure that the customer's needs and expectations are met. They must demonstrate this on at least 2 separate occasions.

- 2.5 Communication behaviours can include the positive use of verbal and non-verbal signals which indicate that the customer has been understood. The learner should show empathy and active listening. This can be demonstrated through either face-to-face, written or digital communication.
- 2.6 The evidence should capture situations where the standard customer service approach was not possible due to the customer changing their behaviours. The learner should show that they have adapted their approach on at least 2 occasions.
- 2.7 The learner should demonstrate at least 2 of the techniques identified in the key words to show how they tried to manage the situation, even if the end result was not the result that the customer hoped for.
- 2.8 The learner should show that they have referred a customer service issue that they could not resolve or that was outside the limits of their responsibility. The information that they pass on could be verbal or written and could potentially include the customer name and contact details, explanation of the issue, the steps that had been taken to date, timescales (past, present and future), and any internal constraints that had affected the resolution.
- 2.9 Sources of help could be either internal or external. The learner should demonstrate that current information has been passed to the customer which could be verbal or in writing. They should evidence this for at least 2 different customers.
- 2.10 Standards of behaviours and communication should be in line with the procedures set out by the organisation for either verbal, written or digital communication, and could include use of branding, house style, professionalism, style of greeting and sign off, record keeping, limits of responsibility, limit of offer, escalation etc. They should evidence this for at least 2 different customers.
- The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

### Types of evidence

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products
- professional discussion.

**Unit 05 Support and improve customer service (Y/618/0499)**

<b>Unit summary</b>	This unit examines the tools and techniques available which enable customer service delivery and improvements.
<b>Guided learning hours</b>	20
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Understand the scope of customer service information

**The learner can:**

- 1.1 Describe the **systems, equipment and technology** that can be used to deliver customer service
- 1.2 Demonstrate the use of **systems, equipment and technology** to support customer service
- 1.3 Explain how customer service information can be used
- 1.4 Maintain accurate records of customer issues

**Key word(s)**

**Systems, equipment and technology:** could include databases, CRM system, digital platforms, payment technology (online or face-to-face), bespoke software

**Assessment guidance**

<b>Delivery and assessment</b>
<p>1.1 The learner should describe at least 4 systems that can be used. They could describe systems that are used by their organisation or systems that are used by others. Payment technology could include card/NFC readers, EPOS systems and payment through websites. Digital platforms could include use of email, website contact forms, online chats and social media.</p> <p>1.2 The learner should demonstrate how they used at least 2 types systems, equipment or technology to support customer service.</p> <p>1.3 The systems, equipment and technology used to deliver customer service all, in some way, provide information about customers. The learner should explain how an organisation could use this information to develop their customer service offer.</p> <p>1.4 The learner should provide evidence that they can keep accurate records of customer service issues in line with their organisation's procedures. The evidence should show that this has been done on more than one occasion and for more than one customer.</p> <p>The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.</p>

### Types of evidence

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products
- professional discussion.

## Learning outcome 2

**The learner will:**

- 2 Understand how to improve customer service

**The learner can:**

- 2.1 Explain the purpose of encouraging customers to provide feedback
- 2.2 Describe **ways of measuring and evaluating** the effectiveness of customer service
- 2.3 Identify new ways of helping customers based on their feedback, presenting recommendations to others
- 2.4 Explain the importance to an organisation of balancing its needs with the needs of its customers

**Key word(s)**

**Ways of measuring and evaluating:** could include recording and analysing positive and negative comments from email, live chat, social media, phone, complaints log, satisfaction scores, customer surveys, repeat business data, mystery shoppers

**Assessment guidance**

### Delivery and assessment

- 2.1 The learner should explain the purpose of feedback and how it can be of value to the organisation, potentially informing their approach to delivering customer service. They should give examples of what this might be.
- 2.2 The learner should describe at least 3 methods of measuring whether customer service is effective and describe how the findings can be evaluated. This can include looking at quantitative and qualitative data from various sources.
- 2.3 The learner should show that they can interpret feedback from customers and identify a new approach to an aspect of delivering customer service. They should present a recommendation for change to others. This could be to one or more people and should be a person or group who has the authority to take the recommendation on board. The presentation can be either formal or informal, and written or verbal.
- 2.4 What the customer needs may come at a cost to the organisation. The learner should explain why it is important for the organisation to balance their own needs with those of the customer. This

could include consideration of profitability, resources, brand promise and reputation. Resources to consider when meeting customer needs are the costs associated with the product or service and staffing requirements.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

### **Types of evidence**

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products (including a presentation)
- professional discussion.

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

<b>Unit summary</b>	This unit requires the learner to examine their own role, presentation and continuous development both as an individual and as an effective member of a team.
<b>Guided learning hours</b>	35
<b>Level</b>	2
<b>Mandatory/optional</b>	Mandatory

**Learning outcome 1****The learner will:**

- 1 Be able to develop self-awareness and personal effectiveness

**The learner can:**

- 1.1 Describe their role, responsibilities and goals within the team and the organisation
- 1.2 Explain the limits of their own authority when dealing with customer service problems
- 1.3 Outline the targets they need to deliver against
- 1.4 Seek and use feedback from others to develop own customer service knowledge and skills
- 1.5 Identify their own development needs in the customer service role and propose solutions
- 1.6 Present a professional image by using appropriate language and dress code in line with organisational standards
- 1.7 Prioritise own workload
- 1.8 Complete customer service tasks to meet deadlines

**Assessment guidance****Delivery and assessment**

- 1.1 The learner should ensure that they describe all 3 aspects (role, responsibilities and goals) in relation to their team and, similarly, in relation to the organisation. They should highlight those aspects that relate to delivering customer service.
- 1.2 A customer service problem could be direct or indirect and could arise either verbally, in writing or via digital media. The learner should consider the stages of the customer journey that affect their role and explain what they are able to deliver independently, without supervision, and at what stage the issue would have to be referred to a senior person.
- 1.3 The learner should consider the targets set by their line manager or other senior person in the organisation and should outline individual targets and those of the team. They should highlight those aspects that relate to delivering customer service.
- 1.4 The learner should ask for feedback from relevant colleagues within the organisation and act upon suggestions to improve their customer service knowledge and skills. This could include peer feedback. Actions could be seeking further training, reading guidance documents (internal or external) or engaging in job shadowing or mentoring.
- 1.5 A learner could identify their development needs by completing a skills audit and producing a personal development plan. Proposed solutions could be included in the plan and discussed with their line manager or during the appraisal process.

- 1.6 A learner should show that they have presented themselves in accordance with organisational guidance on dress code. They should demonstrate use of appropriate language in communicating with customers on at least 2 occasions. This could be verbal or written. Appropriate language should be empathic, with a level of formality in line with the situation, avoiding slang and jargon. Language should be positive with a clear message.
- 1.7 The learner should prioritise their tasks according to the level of urgency and importance and should be able to justify their choices. They could use supporting evidence such as task lists, team targets, calendar entries etc.
- 1.8 The learner should show that customer service deadlines have been met to the quality standard expected by the organisation on at least 2 occasions. This could be at any stage of the customer journey and in accordance with the learner's own role.

The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.

#### **Types of evidence**

Evidence could include:

- written report
- reflective account
- oral or written questions
- observation
- witness testimony
- annotated products (including personal development plan and/or appraisal documents)
- professional discussion.

**Learning outcome 2****The learner will:**

2 Be able to work effectively within a team

**The learner can:**

- 2.1 Describe the benefits of working effectively as a team
- 2.2 Explain how own actions can impact on the team and the organisation
- 2.3 Support others in meeting the needs of customers
- 2.4 Work with others to share knowledge, ideas and good practice

**Assessment guidance**

<b>Delivery and assessment</b>
<p>2.1. A team can be any group of people working towards a common goal. The learner should describe at least 4 benefits.</p> <p>2.2. The learner should consider their own role within the team and the organisation and explain the cause and effect of their actions, both positive and negative.</p> <p>2.3. The learner should show they have assisted a colleague, or colleagues, in order to help a customer on at least 2 occasions. This could either be the offer of support or a request for support.</p> <p>2.4. Working with others can be with any number of colleagues. Knowledge, ideas and good practice could be shared through contributing to team meetings, informal discussions and demonstration of skills.</p> <p>The Explanation of terms (Section 3) explains how the terms used in the unit content are applied to this qualification.</p>
<b>Types of evidence</b>
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• written report</li> <li>• reflective account</li> <li>• oral or written questions</li> <li>• observation</li> <li>• witness testimony</li> <li>• annotated products (including minutes of meetings)</li> <li>• professional discussion.</li> </ul>



# Section 3

## Explanation of terms

## Explanation of terms

This table explains how the terms used at Level 2 in the unit content are applied to this qualification (not all verbs are used in this qualification).

<b>Apply</b>	Link existing knowledge to new or different situations.
<b>Assess</b>	Consider information in order to make decisions.
<b>Classify</b>	Organise according to specific criteria.
<b>Compare</b>	Examine the subjects in detail looking at similarities and differences.
<b>Define</b>	State the meaning of a word or phrase.
<b>Demonstrate</b>	Show an understanding of the subject or how to apply skills in a practical situation.
<b>Describe</b>	Write about the subject giving detailed information.
<b>Differentiate</b>	Give the differences between two or more things.
<b>Discuss</b>	Write an account giving more than one view or opinion.
<b>Distinguish</b>	Show or recognise the difference between items/ideas/information.
<b>Estimate</b>	Give an approximate decision or opinion using previous knowledge.
<b>Explain</b>	Provide details about the subject with reasons showing how or why. Some responses could include examples.
<b>Give (positive and negative points...)</b>	Provide information showing the advantages and disadvantages of the subject.
<b>Identify</b>	List or name the main points (some description may also be necessary to gain higher marks when using compensatory marking).
<b>Illustrate</b>	Give clear information using written examples, pictures or diagrams.
<b>List</b>	Make a list of key words, sentences or comments that focus on the subject.
<b>Plan</b>	Think about and organise information in a logical way. This could be presented as written information, a diagram, an illustration or other suitable format.
<b>Perform</b>	Do something (take an action/follow an instruction) which the question or task asks or requires.
<b>Provide</b>	Give relevant information about a subject.
<b>Reflect</b>	Learners should look back on their actions, experiences or learning and think about how this could inform their future practice.

<b>Select</b>	Choose for a specific purpose.
<b>Show</b>	Supply sufficient evidence to demonstrate knowledge and understanding.
<b>State</b>	Give the main points clearly in sentences.
<b>Use</b>	Take or apply an item, resource or piece of information as asked in the question or task.

# Section 4

## Additional information

**Additional information****Resource requirements**

There are no mandatory resource requirements for this qualification, but centres must ensure learners have access to suitable resources to enable them to cover all the appropriate learning outcomes.

---

**Support for learners****Learner's Evidence Tracking Log (LETL)**

The LETL covers the mandatory units in this qualification, and it can help learners keep track of their work. This document can be downloaded free of charge from the Qualifications page on the NCFE website. You do not have to use the LETL – you can devise your own evidence tracking document instead.

---

**Learning resources**

We offer a wide range of learning resources and materials to support the delivery of our qualifications. Please check the Qualifications page on the NCFE website for more information and to see what is available for this qualification.

---

## Contact us

NCFE  
Q6  
Quorum Park  
Benton Lane  
Newcastle upon Tyne  
NE12 8BT

Tel: 0191 239 8000\*

Fax: 0191 239 8001

Email: [customersupport@ncfe.org.uk](mailto:customersupport@ncfe.org.uk)

Websites: [www.ncfe.org.uk](http://www.ncfe.org.uk)

**NCFE © Copyright 2022 All rights reserved worldwide.**

Version 1.1 June 2022

Information in this qualification specification is correct at the time of publishing but may be subject to change.

NCFE is a registered charity (Registered Charity No. 1034808) and a company limited by guarantee (Company No. 2896700).

CACHE; Council for Awards in Care, Health and Education; and NNEB are registered trademarks owned by NCFE.

All the material in this publication is protected by copyright.

***\* To continue to improve our levels of customer service, telephone calls may be recorded for training and quality purposes.***