

Qualification specification

NCFE Level 1 Certificate in Customer Service QN: 601/3972/9

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Summary of changes

This document summarises the changes to this qualification specification.

Version	Publication date	Summary of amendments
v4.1	January 2020	Information regarding the <u>wellbeing and safeguarding</u> of learners added to Section 1 (page 12).
v4.2	June 2022	Further information added to the how the qualification is assessed 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.
		Information added to the <u>entry guidance</u> section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.
		Support handbook section added to section 1 about how to access support handbooks.
		References to GDPR have been updated to <u>UK General Data</u> <u>Protection Regulation (UK GDPR).</u>

Section 1

Qualification overview

Qualification overview

Introduction

We want to make your experience of working with NCFE as pleasant and easy as possible. This qualification specification contains everything you need to know about this qualification and should be used by everyone involved in the planning, delivery and assessment of the Level 1 Certificate in Customer Service.

All information contained in this specification is correct at the time of publishing.

To ensure that you are using the most up-to-date version of this qualification specification please check the issue date in the page headers 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 regulated qualification title of NCFE Level 1 Certificate in Customer Service

The Level 1 Certificate in Customer Service is a competence-based qualification.

A competence-based qualification is based on National Occupational Standards (NOS) and is a job-ready qualification which requires learners to demonstrate the skills and knowledge required to work in a specific industry. A competence-based qualification must be assessed in the workplace or in a realistic work environment (RWE) in accordance with the relevant assessment strategy and guidance. For further information on the strategy and guidance please visit the qualifications page on the NCFE website

About this qualification

This is a regulated qualification. The regulated number for this qualification is 601/3972/9.

This is a cross sector qualification aimed at current and prospective customer service workers. This qualification covers the skills and knowledge needed to be a customer service worker, covering competencies applicable to a wide range of contexts.

This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

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.

Things you need to know

Qualification number (QN): 601/3972/9

• Aim reference: 60139729

Total Qualification Time (TQT): 230Guided learning hours (GLH): 133

Credit value: 23

Level: 1

• Assessment requirements: internally assessed and externally moderated portfolio of evidence

Total Qualification Time (TQT)

Total Qualification Time is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time comprises:

- the Guided Learning Hours for the qualification
- an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study
 or any other form of participation in education or training, including assessment, which takes place as
 directed by but not under the immediate guidance or supervision of a lecturer, supervisor, Tutor
 or other appropriate provider of education or training.

Aims and objectives of this qualification

This qualification aims to:

- provide learners with the skills and knowledge required to successfully work in customer services
- develop learners' skills in communication, resolving queries and meeting customers' needs
- build learners' knowledge of the principles of customer service.

The objectives of this qualification are to help learners to:

- develop customer service skills that can be relied upon by employers in a range of industries
- provide learners with the skills and knowledge needed to communicate effectively with customers and provide effective customer service.

Entry guidance

This qualification is designed for learners aged pre-16 and above who are working in or are looking to work in a customer service role or similar.

Registration is at the discretion of the centre, in accordance with equality legislation, and should be made on the Portal.

There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.

This qualification is suitable for learners aged pre-16 and above.

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 assessment criteria and comply with the relevant literacy, numeracy, and health and safety aspects of this qualification. Learners registered on this qualification shouldn't 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 the Level 1 Certificate in Customer Service, learners must achieve a minimum of 23 credits:

- a total of **14** credits from Group A
- a minimum of 6 credits from Group B
- and the remaining credits can come from Group B or Group C

Group A mandatory units

- Unit 01 Understand working in a customer service environment (3 credits)
- Unit 02 Communication in customer service (2 credits)
- Unit 03 Principles of personal performance and development (3 credits)
- Unit 04 Principles of working in a business environment (4 credits)
- Unit 05 Work with others in a business environment (2 credits)

Group B optional units

- Unit 06 Record details of customer service problems (3 credits)
- Unit 07 Deal with customer queries, requests and problems (3 credits)
- Unit 08 Communicate with customers in writing (3 credits)
- Unit 09 Deal with incoming telephone calls from customers (3 credits)
- Unit 10 Make telephone calls to customers (3 credits)
- Unit 11 Process information about customers (3 credits)

Group C optional units

- Unit 12 Manage time and workload (1 credit)
- Unit 13 Meet and welcome visitors in a business environment (2 credits)
- Unit 14 Contribute to sales activities in a contact centre (3 credits)
- Unit 15 Use specific features of contact centre systems and technology (3 credits)
- Unit 16 Health and safety procedures in the workplace (2 credits)
- Unit 17 Processing sales orders (2 credits)
- Unit 18 Meeting customers' after sales needs (3 credits)

The learning outcomes and assessment criteria for each unit are provided in Section 3.

To achieve the Level 1 Certificate in Customer Service, learners must successfully demonstrate their achievement of all learning outcomes and assessment criteria of the units as detailed in this qualification specification. Grades are not awarded.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply. A Credit Certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)

Where the assessment strategy for a unit/qualification allows, it is essential that organisations wishing to operate an 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 will ensure that any competence achieved in this way will be sustained in real employment.

Progression opportunities

Learners who achieve this qualification could progress to:

- Level 2 Certificate in Principles of Customer Service
- Level 2 Diploma in Customer Service
- Level 2 Diploma in Business Administration

It may also be useful to learners studying qualifications in the following sector(s):

- Team Leading
- Retail
- Leisure. Travel and Tourism
- Hospitality

Credit transfer

Where a learner has already achieved a unit with credit, NCFE will recognise that prior learning and will allow the credit to be transferred onto a new qualification, provided that the units have the same Ofqual reference number.

Exemption

Exemption allows learners to use evidence of certificated achievement deemed to be of equivalent value against the requirements of a qualification. However, there are no exemptions currently identified for this qualification.

Equivalent units

Some units have equivalent units identified against them. If a learner has achieved these units previously, they can use them towards achievement of this qualification. However, this qualification has no equivalent units identified.

Recognition of Prior Learning (RPL)

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by a qualified RPL Advisor.

Qualification dates

The qualification review date is the date by which we'll carry out a review of the qualification.

We'll communicate changes relating to extension to qualifications to centres

Staffing requirements

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register
- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

Assessors and Internal Quality Assurance

Staff involved in the Assessment and Internal Quality Assurance of this qualification must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the units being assessed and internal quality assured. This may be gained through experience and/or qualifications.

Examples of relevant qualifications

- Degree in Customer Service or Customer Service-related subject
- GCSE and/or A level in Customer Service or Customer Service-related subject
- Level 2 or 3 NVQ in Customer Service
- Staff must hold or be working towards an assessor qualification. Assessors working towards an
 appropriate qualification must ensure their decisions are countersigned by a suitably-qualified
 assessor/verifier.

Examples of work experience

Staff must have recent and relevant experience of working in a customer service role

Teaching specialist in Customer Service or similar discipline.

As this qualification is competence-based, please refer to the assessment strategy document available on the NCFE website.

Resource requirements

The following document is essential reading for any centre involved in the delivery, assessment and administration of this qualification:

Skills CFA Assessment Strategy

This document can be downloaded from the NCFE website.

Support for learners

Learner's Evidence Tracking Log (LETL)

The LETL can help learners keep track of their work. This blank document can be downloaded free of charge from the NCFE website You don't have to use the LETL – you can devise your own evidence-tracking documents instead.

Support for centres

There are a number of support documents available that you might find useful for delivery. These are available to download the NCFE website or can be requested by the customer support team on 0191 239 8000 or email customersupport@ncfe.org.uk

Our customer support team will support you with approvals, registrations, external quality assurance, external assessment, results and certification.

Qualification Support Packs

NCFE offers free Qualification Support Packs (QSPs) for many of our qualifications.

QSPs are a free resource that Tutors can use when planning and delivering an NCFE qualification. Within a QSP, Tutors will find a Scheme of Work, PowerPoint presentation and a wide range of tasks and worksheets to help learners consolidate their knowledge.

QSPs are not intended to provide full coverage of learning outcomes and assessment criteria, but the content is mapped to the qualification to ensure it is relevant and useful. If you would like to learn more, or to see which qualifications have QSPs then please visit the NCFE website

Customer Support Guide

This explains everything you need to know, from how to apply to become an NCFE-approved centre to registering your learners and claiming their certificates, and everything in between. Centres must seek approval to offer a qualification. Only learners from approved centres can be certificated.

Reasonable Adjustments and Special Considerations Policy

This policy is aimed at our customers - including learners – who use our products and services and who submit requests for reasonable adjustments and special considerations. The policy can be found on the NCFE website

Subject maps

Our suite of subject maps showcase the qualifications we have available within each specialist sector and how they connect to each other. They demonstrate how you can plot routes for your learners at different levels from entry level right through to higher education or the workforce, with supporting qualifications along the way.

Fees and Pricing

This current Fees and Pricing Guide is available on the NCFE website.

Training and support

We can provide training sessions for Assessors and Internal Moderators. Bespoke subject-specific training is also available. For further information please contact our Customer Support team on 0191 239 8000.

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.

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.

Mapping to National Occupational Standards

National Occupational Standards (NOS) are owned by a Sector Skills Council (SSC) or Standard-Setting Body (SSB) and describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The units and structure of this qualification are based on the Skills CFA NOS for Management and Leadership.

Further information on the NOS used in this qualification can be found on the Skills CFA website www.skillscfa.org.

Section 2

Assessment and moderation

Assessment and moderation

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 must be assessed in line with Skills CFA Assessment Strategy.

This document can be downloaded from the NCFE website

The Level 1 Certificate in Customer Service is internally assessed.

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 which demonstrates achievement of all the learning outcomes and assessment criteria associated with each unit. On completion of each unit learners must declare that the work produced is their own. The Assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in Section 3 (page 17).

The main pieces of evidence for the portfolio could include (in no particular order):

- Assessor observation
- witness testimony
- work product
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- learner and peer reports
- Recognition of Prior Learning (RPL).

You will also find a variety of assessment and moderation pro-formas on the NCFE website

Evidence must be drawn from actual work situations, with simulation used only in exceptional circumstances. Please refer to the Skills CFA Assessment Strategy for further information. This can be found on the NCFE website

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they are valid and reliable and maintain the integrity of the assessment and of the standards required of this gualification. Acceptable methods of assessment could be drawn from the list above.

Assessors must be satisfied that learners have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if learners have been successful. Assessors are also responsible for supporting learners through the assessment process.

For approval of methods of internal assessment other than portfolio building, please contact the Customer Support team on 0191 239 8000.

Moderation

Moderation is the process by which we confirm that assessment decisions in centres are:

- made by competent and qualified Assessors
- the product of sound and fair assessment practice
- · recorded accurately and appropriately.

We do this through:

- internal moderation which you carry out
- external moderation which we carry out through our External Moderators who, by supporting you, will make sure that assessments meet nationally agreed standards and that your quality assurance systems continue to meet our centre approval criteria.

The Internal Moderator provides the vital link between the Assessors and the External Moderator and acts as the centre's quality assurance agent.

If you'd like to know more about the responsibilities of Assessors and Internal and External Moderators please refer to our Customer Support Guide.

Section 3

Structure and content

Structure and content

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

The unit summary provides an overview of each unit including:

- unit title
- unit overview
- guided learning hours
- credit value
- level
- an indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- unit title and number
- learning outcomes (the learner will) and assessment criteria (the learner can)
- guidance for developing assessment (an explanation of technical terms and the depth and breadth of coverage of the unit)
- assessment guidance (types of evidence for internal assessment)

The regulators' unit number is indicated in brackets for each unit (e.g. M/100/7116). However, to make cross-referencing assessment and moderation easier, we've used a sequential numbering system in this document for each unit.

For further information or guidance about this qualification please contact our Customer Support team on 0191 239 8000.

Unit summaries

Unit 01 Understand working in a customer service environment (L/506/2083)

The purpose of this unit is to increase learners' understanding of the customer service role. Learners will be able to identify the different types of customer and their needs and be able to refer problems.

Guided learning hours: 25

Credit value: 3

Level: 1

This unit is mandatory

Unit 02 Communication in customer service (Y/506/2085)

This unit aims to develop learners' knowledge of communication skills and to develop different methods of communication when interacting with customers.

Guided learning hours: 14

Credit value: 2

Level: 1

This unit is mandatory

Unit 03 Principles of personal performance and development (L/506/1791)

This unit will provide learners with the knowledge of their rights and employer expectations and enable learners to know how to manage their own development needs.

Guided learning hours: 30

Credit value: 3

Level: 1

This unit is mandatory

Unit 04 Principles of working in a business environment (R/506/1792)

In this unit, learners will have an opportunity to increase their knowledge of business organisations. Learners will understand the importance of environmental sustainability. They will also know how to support equality and diversity, and the importance of confidentiality in the workplace.

Guided learning hours: 25

Credit value: 4

Level: 1

This unit is mandatory

Unit 05 Work with others in a business environment (Y/506/1793)

This unit aims to ensure that learners understand the principles of how to work effectively with others, maintaining standards of performance and following organisational policies and procedures and legal requirements.

Guided learning hours: 18

Credit value: 2

Level: 1

This unit is mandatory

Unit 06 Record details of customer service problems (A/506/2094)

The purpose of this unit is to provide learners with an understanding of how to deal with customer problems by collecting relevant information and referring to the appropriate people.

Guided learning hours: 14

Credit value: 3

Level: 1

This unit is optional

Unit 07 Deal with customer queries, requests and problems (A/506/2113)

In this unit, learners will have an opportunity to increase their knowledge of how to identify customer queries, requests and problems and be able to resolve the problems within the limits of their authority and organisational procedures.

Guided learning hours: 11

Credit value: 3

Level: 1

This unit is **optional**

Unit 08 Communicate with customers in writing (T/506/2126)

In this unit learners will have the opportunity to increase their knowledge of the different forms of written communication. Learners will be able to select the most appropriate method of communication and produce clearly written documents that meet the needs of the customers.

Guided learning hours: 20

Credit value: 3

Level: 2

Unit 09 Deal with incoming telephone calls from customers (H/506/2154)

This unit aims to provide learners with an understanding of the principles and techniques of dealing with incoming telephone calls from customers. Learners will develop the ability to effectively communicate to deal with customer questions and requests.

Guided learning hours: 16

Credit value: 3 Level: 2

This unit is **optional**

Unit 10 Make telephone calls to customers (K/506/2155)

This unit is designed to equip learners with the knowledge to develop their skills to plan and make telephone calls to customers, giving the required information in line with organisational procedures.

Guided learning hours: 16

Credit value: 3

Level: 2

This unit is optional

Unit 11 Process information about customers (R/506/2134)

The purpose of this unit is to enable learners to be able to record and store customer information and keep the system up to date in line with legal and ethical requirements.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is optional

Unit 12 Manage time and workload (H/506/1795)

This purpose of this unit is to develop learners' understanding of time management techniques.

Guided learning hours: 10

Credit value: 1

Level: 1

Unit 13 Meet and welcome visitors in a business environment (A/506/1799)

This unit aims to provide learners with an understanding of how to meet and welcome visitors, recording visitors' arrivals and departures adhering to health, safety and security requirements.

Guided learning hours: 20

Credit value: 2

Level: 1

This unit is optional

Unit 14 Contribute to sales activities in a contact centre (F/503/0392)

The purpose of this unit is to enable learners to develop their knowledge of the products and services provided by the organisation and to make sales and take payment.

Guided learning hours: 6

Credit value: 3

Level: 1

This unit is optional

Unit 15 Use specific features of contact centre systems and technology (F/503/0361)

This unit aims to ensure that learners understand systems and technology in a contact centre and are able to use the systems to contact customers.

Guided learning hours: 12

Credit value: 3

Level: 1

This unit is **optional**

Unit 16 Health and safety procedures in the workplace (T/505/4673)

The aim of this unit is to equip learners with the knowledge and ability to adhere to health and safety in the workplace.

Guided learning hours: 16

Credit value: 2

Level: 2

Unit 17 Processing sales orders (M/502/8587)

This purpose of this unit is to develop learners' understanding of the processes for ordering products and/or services, identifying customer requirements and finalising the transaction in accordance with organisational procedures.

Guided learning hours: 17

Credit value: 2 Level: 2

This unit is optional

Unit 18 Meeting customers' after sales needs (R/502/8601)

This unit is designed to equip learners with the ability to deal with customers' after sales needs, fulfilling commitments made to customers following organisational customer service standards and procedures.

Guided learning hours: 14

Credit value: 3

Level: 2

Unit 01 Understand working in a customer service environment (L/506/2083)

The learner will:

1 Know the importance of customer service

The learner can:

- 1.1 State what is meant by 'customer service'
- 1.2 State why effective customer service is important to an organisation

The learner will:

2 Know the factors affecting customer service

The learner can:

- 2.1 Outline the difference between an internal and an external customer
- 2.2 State how to identify customers' needs and expectations
- 2.3 List information sources needed to deliver reliable customer service
- 2.4 Describe the relationship between customer expectations and customer satisfaction

The learner will:

3 Know how to work in a customer service role

The learner can:

- 3.1 Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services
- 3.2 Identify the job roles within a team delivering customer service
- 3.3 State the standards of personal presentation and behaviour expected by customer service staff in different organisations
- 3.4 State standards and practices that relate to a service offer within different types of organisation
- 3.5 Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
- 3.6 Describe the procedures for protecting customers' personal information and safety
- 3.7 State the importance of protecting customers' personal information and safety

Unit 01 Understand working in a customer service environment (L/506/2083) (cont'd)

The learner will:

4 Know how to refer customer queries and problems to others

The learner can:

- 4.1 Describe types of customer behaviour that show when a customer is dissatisfied
- 4.2 State the procedures to be followed when dealing with customer queries or problems
- 4.3 State to whom to refer customer queries and problems

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Unit 01 Understand working in a customer service environment (L/506/2083) (cont'd)

Assessment guidance

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.

Assessment criteria:

- Customer expectations are what people think should happen and how they think they should be treated when asking for or receiving customer service.
 Customer satisfaction is the feeling that a customer gets when he or she is happy with the customer service that has been provided.
- 3.4 **A service offer** defines the extent and limits of the customer service that an organisation is offering.
- 3.4 **Different types of organisation** requires the learner to provide more than one example from their sector.
- 3.5 **Legislation and organisational requirements** will depend on the industry and organisation. The learner should be aware of what these are for an identified sector or organisation.
- 4.2 **Problems** in customer service happen when the customer service does not meet customer expectations.

Unit 02 Communication in customer service (Y/506/2085)

The learner will:

1 Know how to communicate in a customer service role

The learner can:

- 1.1 Describe different methods of communicating with customers and when it is appropriate to use them
- 1.2 Give examples of positive and negative customer service language
- 1.3 State the importance of speaking clearly
- 1.4 Describe how tone of voice can affect how customers perceive their experience
- 1.5 Describe how body language conveys what someone is thinking or feeling
- 1.6 Define the term 'active listening'
- 1.7 List the types of information needed to communicate effectively with customers
- 1.8 State why it is important to pass information and messages to colleagues

The learner will:

2 Be able to communicate with customers

The learner can:

- 2.1 Listen 'actively' to what customers are saying
- 2.2 Check their own understanding of customers' needs
- 2.3 Summarise information for customers
- 2.4 Check that customers are satisfied with the information provided
- 2.5 Follow organisational standards of behaviour and communication when interacting with customers
- 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers

Unit 02 Communication in customer service (Y/506/2085) (cont'd)

Assessment guidance

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.

Assessment criteria:

- 2.2 Learners should be encouraged to develop a range of methods to **check their own understanding** of customers' needs.
- 2.3 Learners are to provide evidence of how they **summarise information** to best aid understanding
- 2.5 Where possible, adherence to **organisational standards**, **policies and procedures** should be confirmed by a line manager or experienced colleague
- 2.6 Learners should also be aware of which **legal requirements** affect their communications.

Unit 03 Principles of personal performance and development (L/506/1791)

The learner will:

1 Know employees' rights and employers' expectations

The learner can:

- 1.1 State an organisation's expectations for the conduct of its employees
- 1.2 State an employee's rights in relation to their employment
- 1.3 State why it is important to work within employees' rights and employers' expectations
- 1.4 State where to find information and advice on employees' rights and employers' expectations

The learner will:

2 Know how to manage their own work

The learner can:

- 2.1 Describe ways of managing allocated tasks to ensure they are completed on time
- 2.2 State the purpose of keeping other people informed of progress and problems with work activities
- 2.3 Explain the importance of accepting responsibility for one's own work
- 2.4 State the limits of their own responsibilities at work
- 2.5 State what to do when a problem arises with work activities

The learner will:

3 Know ways of managing and improving personal performance and development

The learner can:

- 3.1 State the purpose and benefits of personal development at work
- 3.2 Describe the purpose of individual and team goals and targets
- 3.3 Explain the use of personal development plans
- 3.4 Explain the importance of fulfilling a personal development plan
- 3.5 Outline a manager's role in an individual's personal development
- 3.6 Outline relevant personal development opportunities and career paths within the organisation
- 3.7 Describe how acting on feedback can benefit a team and organisation

There is no assessment guidance available for this unit.

Unit 04 Principles of working in a business environment (R/506/1792)

The learner will:

1 Know the purpose and structure of business organisations

The learner can:

- 1.1 State the purposes of different types of business organisations
- 1.2 Explain why it is important for a business to be financially secure
- 1.3 State the purposes of an organisational chart
- 1.4 Describe the role of the main functional areas of business organisations

The learner will:

2 Know how to contribute to environmental sustainability within an organisation

The learner can:

- 2.1 State what is meant by 'environmental sustainability'
- 2.2 Explain why it is important to keep waste to a minimum
- 2.3 Describe practices that may be used to minimise waste in a business environment
- 2.4 State the standard procedures to be followed when recycling and disposing of waste

The learner will:

3 Know how to support equality and diversity within an organisation

The learner can:

- 3.1 State the meaning of the terms 'equality' and 'diversity'
- 3.2 State why it is important to support equality and diversity in the work environment
- 3.3 Describe ways of behaving that show sensitivity and respect for other people
- 3.4 State the legal requirements relating to equality and diversity

The learner will:

4 Know the requirements of confidentiality and security in an organisation

The learner can:

- 4.1 State the importance of maintaining organisational standards of confidentiality
- 4.2 Outline how confidentiality requirements affect the workplace
- 4.3 State the importance of maintaining organisational standards of security
- 4.4 Outline how security requirements affect the workplace

There is no assessment guidance available for this unit.

Unit 05 Work with others in a business environment (Y/506/1793)

The learner will:

1 Know how to work with others in a business environment

The learner can:

- 1.1 Describe how their own role fits in with the role of others in their team
- 1.2 Describe how their own behaviour can affect teamwork
- 1.3 Describe behaviours that show trust, respect and consideration for others
- 1.4 Outline the importance of following instructions when completing tasks
- 1.5 State the importance of understanding authority at work
- 1.6 State why it is important to behave in a way that does not cause conflict
- 1.7 State what to do if problems occur when working with others
- 1.8 Describe different ways to help colleagues with work activities

The learner will:

2 Be able to work with others in a business environment

The learner can:

- 2.1 Meet agreed deadlines, targets and quality standards
- 2.2 Maintain expected standards of performance
- 2.3 Act positively on feedback on own performance
- 2.4 Treat others with courtesy and respect
- 2.5 Follow organisational policies and procedures and legal requirements whilst working with others

There is no assessment guidance available for this unit.

Unit 06 Record details of customer service problems (A/506/2094)

The learner will:

1 Know how to process details of customers' problems

The learner can:

- 1.1 Describe how to recognise when customers are raising problems
- 1.2 State why reference codes are used to identify customers and specific transactions
- 1.3 Describe different types of questions to ask when processing details of customers' problems
- 1.4 Describe how to behave and communicate with customers who are dissatisfied
- 1.5 Describe when, why and to whom to refer customers' problems

The learner will:

2 Be able to gather and record details from customers who raise problems

The learner can:

- 2.1 Respond to customers calmly and professionally
- 2.2 Take details that will identify individual customers
- 2.3 Identify the nature and likely causes of problems
- 2.4 Check their own understanding of what customers see as a problem
- 2.5 Record details of customers' problems
- 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with problems

The learner will:

3 Be able to refer details of customers' problems to colleagues

The learner can:

- 3.1 Refer customers' problems to the appropriate people
- 3.2 Explain to customers what is happening, without making promises

Unit 06 Record details of customer service problems (A/506/2094) (cont'd)

Assessment guidance

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.

Assessment criteria:

- 1.1 **Problems** in customer service happen when the customer service does not meet customer expectations
- 1.2 **Reference codes** are an organisation's unique identifiers for customers.
- 1.3 **Different types of questions** can include both open and closed questions
- 2.2 **Details** can include: name, address, contact number
- 3.1 **Appropriate people** can include but is not exclusive to:
 - supervisor
 - management
 - head office

Unit 07 Deal with customer queries, requests and problems (A/506/2113)

The learner will:

1 Know how to deal with customer queries, requests and problems

The learner can:

- 1.1 List queries and requests that customers are likely to have
- 1.2 Describe how to identify customers' queries, requests and problems
- 1.3 Describe how to behave and communicate with customers who are dissatisfied
- 1.4 Describe the kinds of behaviour and communication that could make a situation worse
- 1.5 Describe when, why and from whom to obtain information or help
- 1.6 State to whom and when problems should be referred

The learner will:

2 Be able to deal with customers' gueries and requests

The learner can:

- 2.1 Deal with gueries and requests in a professional way
- 2.2 Provide customers with responses to their queries within the limits of their own authority
- 2.3 Obtain information or help when queries or requests cannot be answered
- 2.4 Keep customers informed of progress

The learner will:

3 Be able to deal with customers' problems

The learner can:

- 3.1 Identify the nature of customers' problems
- 3.2 Communicate with customers calmly and confidently
- 3.3 Resolve problems within the limits of their own authority
- 3.4 Brief colleagues when referring problems
- 3.5 Check that customers are satisfied with the actions taken
- 3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

Unit 07 Deal with customer queries, requests and problems (A/506/2113) (cont'd)

Assessment guidance

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.

Assessment criteria:

1.4 **Behaviours** are actions and mannerisms towards others.

Unit 08 Communicate with customers in writing (T/506/2126)

The learner will:

1 Understand how to communicate with customers in writing

The learner can:

- 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 UK General Data Protection Regulations (UK GDPR) when communicating with customers in writing

The learner will:

2 Be able to plan written communications to customers

The learner can:

- 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

The learner will:

3 Be able to communicate with customers in writing

The learner can:

- 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

Unit 08 Communicate with customers in writing (T/506/2126) (cont'd)

Assessment guidance

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.

Assessment criteria:

- 1.1 Written communication may include letter, email, online forum etc.
- 1.4 **Implications**, including those of a legal nature
- 2.3 Service offer defines the extent and limits of the customer service that an organisation is offering

Unit 09 Deal with incoming telephone calls from customers (H/506/2154)

The learner will:

1 Understand how to deal with incoming customer calls

The learner can:

- 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

The learner will:

2 Be able to establish the purpose of incoming customer calls

The learner can:

- 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

The learner will:

3 Be able to deal with customer questions and requests

The learner can:

- 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

Unit 09 Deal with incoming telephone calls from customers (H/506/2154) (cont'd)

Assessment guidance

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.

Assessment criteria:

- 1.2 **Identity checking processes** could include but are not exclusive to:
 - third party verification (TPV)
 - passwords
 - passport/bank account numbers.
- 1.6 **Questioning techniques** may include, but is not exclusive to:
 - open
 - closed
 - verbal
 - written
 - probing
 - clarification.

2.4 **Listening actively** refers to:

- asking questions to check information
- repeating information to show understanding
- avoiding distractions, assumptions and interruptions
- using body language/facial expressions as if the customer is present.

Unit 10 Make telephone calls to customers (K/506/2155)

The learner will:

1 Understand how to make telephone calls to customers

The learner can:

- 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

The learner will:

2 Be able to plan telephone calls to customers

The learner can:

- 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

The learner will:

3 Be able to make telephone calls to customers

The learner can:

- 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

Unit 10 Make telephone calls to customers (K/506/2155) (cont'd)

Assessment guidance

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.

Assessment criteria:

- 1.6 **Questioning techniques** may include, but is not exclusive to:
 - open
 - closed
 - verbal
 - written
 - probing
 - clarification.

Unit 11 Process information about customers (R/506/2134)

The learner will:

1 Understand how to process customer information

The learner can:

- 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

The learner will:

2 Be able to process customer information

The learner can:

- 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

Unit 11 Process information about customers (R/506/2134) (cont'd)

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.

Assessment criteria:

- 1.1 The description should be in relation to the **customer information systems** in use at the learner's place of employment.
- 1.2 The explanation should specifically identify appropriate **legislation and regulatory** requirements.
- 1.3 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 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 Where possible, adherence to **organisational standards and procedures** should be confirmed by a line manager or experienced colleague.
- 2.3 The learner should be able to differentiate between **authorised** and unauthorised **people**. **Timely manner -** in line with organisational procedures
- 2.5 Where an organisation adopts a standardised format, over which the learner has no control, this assessment criteria can be met by 'what if' scenarios.
- 2.6 Learners should also have an understanding of which legal requirements affect their activities.

Unit 12 Manage time and workload (H/506/1795)

The learner will:

1 Know how to manage their own time and workload

The learner can:

- 1.1 Describe ways of managing time and workload
- 1.2 State why it is important to the organisation and the individual that time and workload are managed effectively
- 1.3 State why it is important to seek work and offer help to others
- 1.4 Describe how seeking help from colleagues can help in managing workload
- 1.5 Describe why it is important to accept responsibility for their own mistakes

The learner will:

2 Be able to manage time and workload

The learner can:

- 2.1 Use time management techniques to manage the completion of tasks
- 2.2 Finish tasks within the allotted timescale
- 2.3 Inform team members of progress and developments of work activities
- 2.4 Ask for work when existing tasks have been completed
- 2.5 Report problems beyond their own level of authority to the appropriate person
- 2.6 Follow organisational procedures and legal requirements when managing time and workload

There is no assessment guidance available for this unit.

Unit 13 Meet and welcome visitors in a business environment (A/506/1799)

The learner will:

1 Know how to meet visitors in a business environment

The learner can:

- 1.1 State an organisation's procedures for dealing with visitors
- 1.2 Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors
- 1.3 Identify any organisational health, safety and security requirements relevant to visitors
- 1.4 Describe what to do and who to contact when problems with visitors arise

The learner will:

2 Be able to meet visitors in a business environment

The learner can:

- 2.1 Welcome visitors politely in accordance with organisational standards
- 2.2 Confirm the identity of visitors and the reasons for their visit
- 2.3 Check that any health, safety and security actions are carried out
- 2.4 Record visitors' arrival and departure in accordance with organisational procedures
- 2.5 Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards
- 2.6 Present a positive personal image in accordance with organisational standards

There is no assessment guidance available for this unit.

Unit 14 Contribute to sales activities in a contact centre (F/503/0392)

The learner will:

1 Be able to gather and use specified sales information in a contact centre

The learner can:

- 1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures
- 1.2 Provide information to customers about products and/or services in accordance with organisational procedures
- 1.3 Collect from customers information that supports potential sales in accordance with organisational procedures
- 1.4 Check with customers the accuracy of the information provided
- 1.5 Keep records of customers in accordance with organisational procedures

The learner will:

2 Be able to make direct sales to customers through a contact centre

The learner can:

- 2.1 Identify customers in accordance with organisational procedures
- 2.2 Establish customers' needs for potential sales of products and/or services within their level of authority
- 2.3 Check with customers the accuracy of the order
- 2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority
- 2.5 Complete the authorisation or payment in accordance with organisational procedures

The learner will:

3 Understand sales activities in a contact centre

The learner can

- 3.1 List the products and/or services offered or supported by the contact centre
- 3.2 List the regulations and/or legislation that has an impact on dealing with customers
- 3.3 State the organisational procedures for processing sales and payments and/or establishing order authority with customers

Assessment guidance

This unit must be assessed in line with Skills CFA Contact Centre Assessment Strategy. Please visit the NCFE website

Unit 15 Use specific features of contact centre systems and technology (F/503/0361)

The learner will:

1 Be able to use contact centre systems and technology to carry out customer contact tasks

The learner can:

- 1.1 Log into the technology system that is appropriate for dealing with customer contacts
- 1.2 Follow defined pathways through the system to complete customer contact tasks
- 1.3 Use features of the technology contact handling system to control customer contacts
- 1.4 Locate information on the system needed to complete a customer contact
- 1.5 Identify to whom to refer when the customer contact cannot be completed
- 1.6 Input information into the system in accordance with organisational procedures
- 1.7 Validate the customer's identity from information given and information held on the system

The learner will:

2 Understand contact centre systems and technology

The learner can:

- 2.1 State the organisational procedures and guidelines for handling customer contacts
- 2.2 List the products and/or services offered or supported by the contact centre
- 2.3 List the regulation and/or legislation relevant to the contact centre's work with customers
- 2.4 State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle
- 2.5 State the procedures for logging onto the technology systems
- 2.6 State how to respond to prompts from the system indicating the pathway to be followed
- 2.7 State how to use systems and technology to handle customer contacts
- 2.8 Identify the categories of customer contacts that they are authorised to handle

Assessment guidance

This unit must be assessed in line with Skills CFA Contact Centre Assessment Strategy. Please visit the NCFE website.

Unit 16 Health and safety procedures in the workplace (T/505/4673)

The learner will:

1 Know health and safety procedures in the workplace

The learner can:

- 1.1 Define the main responsibilities for health and safety in the workplace of the following:
 - a) employers
 - b) employees
- 1.2 Describe 2 health and safety laws 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

The learner will:

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

The learner can:

- 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

There is no assessment guidance available for this unit.

Unit 17 Processing sales orders (M/502/8587)

The learner will:

1 Understand how to process and follow up sales orders

The learner can:

- 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

The learner will:

2 Be able to process sales orders

The learner can:

- 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

The learner will:

3 Be able to follow up sales order processing

The learner can:

- 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

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy. Please visit the NCFE website

Unit 18 Meeting customers' after sales needs (R/502/8601)

The learner will:

1 Be able to investigate customer after sales needs

The learner can:

- 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

The learner will:

2 Be able to handle customers' after sales needs

The learner can:

- 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

The learner will:

3 Be able to review the after sales process

The learner can:

- 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

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy. Please visit the NCFE website

Section 4

Explanation of terms

Explanation of terms used at Level 1: (not all verbs are used in this qualification)

Define	Give the meaning of a word or phrase.
Demonstrate	Show an understanding of the subject.
Describe	Provide details about the subject or item.
Explain	Provide details about the subject with reasons showing how or why.
Give (examples of)	Provide relevant examples to support the subject.
Identify	List or name the main points.
Indicate	Point out or show using words, illustrations or diagrams.
Locate	Find or identify.
List	Make a list of words, sentences or comments.
Outline	Identify or describe the main points.
Plan	Think about, organise and present information in a logical way. This could be presented as written information, a diagram or an illustration.
Show	Give information that includes clear knowledge about the subject.
State	Give the main points in brief, clear sentences.
Use	Take an item, resource or piece of information and link to the question or task.

Section 5

General information

General information

Equal opportunities

NCFE fully supports the principle of equal opportunities and opposes all unlawful or unfair discrimination on the grounds of ability, age, colour, culture, disability, domestic circumstances, employment status, gender, marital status, nationality, political orientation, racial origin, religious beliefs, sexual orientation and social background. NCFE aims to ensure that equality of opportunity is promoted and that unlawful or unfair discrimination, whether direct or indirect, is eliminated both in its own employment practices and in access to its qualifications. A copy of our Diversity and Equality policy is available on the NCFE website.

Diversity, access and inclusion

Our qualifications and associated assessments are designed to be accessible, inclusive and nondiscriminatory. NCFE regularly evaluates and monitors the 6 diversity strands (gender, age, race, disability, religion, sexual orientation) throughout the development process as well as throughout the delivery, external moderation and external assessment processes of live qualifications. This ensures that positive attitudes and good relations are promoted, discriminatory language is not used and our assessment procedures are fully inclusive.

Learners who require reasonable adjustments or special consideration should discuss their requirements with their Tutor who should refer to our Reasonable Adjustments and Special Considerations policy for quidance.

For more information on the Reasonable Adjustments and Special Considerations policy please see the NCFE website:

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