



# Qualification specification

**NCFE Level 2 Diploma in Customer Service**  
**QN: 601/3973/0**

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## Summary of changes

This document summarises the changes to this qualification specification. Please check the NCFE website for the most recent version.

Version	Publication date	Summary of amendments
v5.0	April 2020	Information regarding the <u>wellbeing and safeguarding</u> of learners added to Section 1 (page 13).  Unit number for Unit 05 Manage personal performance and development corrected to L/506/1788.
v5.1	June 2022	Further information added to the <u>how the qualification is assessed</u> 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.  <u>Support handbook</u> section added to section 1 with information about how to access support handbooks.
v5.2	September 2022	Minor amends to formatting and version control.

# 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 NCFE Level 2 Diploma 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 2 Diploma in Customer Service.

The NCFE Level 2 Diploma 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. For further information on the strategy please visit the qualifications page on the NCFE website.

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### 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.

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## About this qualification

This is a regulated qualification. The regulated number for this qualification is 601/3973/0.

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.

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## Things you need to know

- Qualification number (QN): 601/3973/0
  - Aim reference: 60139730
  - Total Qualification Time (TQT): 450
  - Guided learning hours (GLH): 247
  - Credit value: 45
  - Level: 2
  - Assessment requirements: internally assessed and externally moderated portfolio of evidence
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## 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.
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## Entry guidance

This qualification is designed for learners aged 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 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.

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## Achieving this qualification

To be awarded the NCFE Level 2 Diploma in Customer Service, learners must achieve a minimum of 45 credits:

- a total of **19** credits from Group A
- a minimum of **3** credits from Group B
- a minimum of **16** credits from Group C
- the remaining credits can be taken from Groups B, C or D.

### Group A mandatory units

- Unit 01 Deliver customer service (5 credits)
- Unit 02 Understand customers (2 credits)
- Unit 03 Principles of customer service (4 credits)
- Unit 04 Understand employer organisations (4 credits)
- Unit 05 Manage personal performance and development (4 credits)

### Group B optional units

- Unit 06 Communicate verbally with customers (3 credits)
- Unit 07 Communicate with customers in writing (3 credits)

### Group C optional units

- Unit 08 Deal with incoming telephone calls from customers (3 credits)
- Unit 09 Make telephone calls to customers (3 credits)
- Unit 10 Promote additional products and/or services to customers (2 credits)
- Unit 11 Process information about customers (3 credits)
- Unit 12 Exceed customer expectations (3 credits)
- Unit 13 Deliver customer service whilst working on customers' premises (4 credits)
- Unit 14 Carry out customer service handovers (3 credits)
- Unit 15 Resolve customer service problems (5 credits)
- Unit 16 Deliver customer service to challenging customers (3 credits)
- Unit 17 Develop customer relationships (3 credits)
- Unit 18 Support customer service improvements (3 credits)
- Unit 19 Support customers through real-time online customer service (3 credits)
- Unit 20 Use social media to deliver customer service (3 credits)
- Unit 21 Resolve customers' complaints (4 credits)
- Unit 22 Gather, analyse and interpret customer feedback (5 credits)
- Unit 23 Support customers using self-service equipment (3 credits)
- Unit 24 Provide post-transaction customer service (5 credits)

### Group D optional units

- Unit 25 Health and safety procedures in the workplace (2 credits)
- Unit 26 Manage diary systems (2 credits)
- Unit 27 Provide reception services (3 credits)
- Unit 28 Contribute to the organisation of an event (3 credits)
- Unit 29 Buddy a colleague to develop their skills (3 credits)



- Unit 30 Employee rights and responsibilities (2 credits)
- Unit 31 Develop working relationships with colleagues (3 credits)\*
- Unit 32 Principles of equality and diversity in the workplace (2 credits)
- Unit 33 Processing sales orders (2 credits)
- Unit 34 Meeting customers' after-sales needs (3 credits)
- Unit 35 Handling objections and closing sales (3 credits)
- Unit 36 Deal with incidents through a contact centre (7 credits)
- Unit 37 Carry out direct sales activities in a contact centre (5 credits)
- Unit 38 Negotiate in a business environment (4 credits)
- Unit 39 Bespoke software (3 credits)

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

The units above marked \* are available as stand-alone unit programmes and are available for individual registration. Please visit the NCFE website for further information.

To achieve the NCFE Level 2 Diploma 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.

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

Where the assessment strategy for a unit 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.

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### **Progression opportunities**

Learners who achieve this qualification could progress to:

- NCFE Level 3 Diploma in Customer Service
- NCFE Level 2 Diploma in Team Leading
- NCFE Level 2 and 3 Diplomas in Business Administration

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### **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.

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## **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.

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## **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.

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## **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.

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## **Qualification dates**

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

We'll communicate changes relating to extensions to qualifications to centres.

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## **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 Management or Customer Service-related subject
- A level in Customer Service or Customer Service-related subject
- Level 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, ideally in a supervisory or management context
- Teaching specialist in Customer Service or similar discipline.

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

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### 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 qualifications page on the NCFE website.

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### 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 do not have to use the LETL – you can devise your own evidence tracking document instead.

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### Support for centres

There are a number of documents available on the NCFE website that centres might find useful.

#### 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, 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 document is published in the spring for the forthcoming academic year.

## **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.

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## **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.

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## **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.skillsca.org](http://www.skillsca.org)

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### **Mapping to Personal Learning and Thinking Skills (PLTS)**

This qualification has been mapped to the PLTS framework. Skills CFA has produced a mapping document which you can find on the qualifications page on the NCFE website.

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# 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 the Skills CFA Assessment Strategy. This document can be downloaded from the qualifications page on the NCFE website.

The NCFE Level 2 Diploma 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.

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### 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.

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

- Assessor observation – completed observational checklists and related action plans
- 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).

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 qualifications page 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 qualification. 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.

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## **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.

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# 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 (eg 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.

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## Unit summaries

### Unit 01 Deliver customer service (A/506/2130)

This unit provides learners with an understanding of customer service delivery, how to prepare to deal with customers and be able to support improvements to the service they provide.

Guided learning hours: 27

Credit value: 5

Level: 2

This unit is **mandatory**

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### Unit 02 Understand customers (F/506/2131)

This unit provides learners with an understanding of the different types of customer and the value of customers and their loyalty. Learners will understand the relationship between good customer service and customer loyalty and how this affects the organisation in terms of reputation and image.

Guided learning hours: 17

Credit value: 2

Level: 2

This unit is **mandatory**

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### Unit 03 Principles of customer service (J/506/2132)

This unit provides the learners with an understanding of customer service, as well as how to deliver effective customer service and the legal and ethical requirements that relate to customer service and maintaining customer service information.

Guided learning hours: 34

Credit value: 4

Level: 2

This unit is **mandatory**

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### Unit 04 Understand employer organisations (A/506/1964)

This unit ensures learners understand organisational structures and the differences between private, public and voluntary sectors. Learners will be able to describe the internal and external influences on organisations and why change in the business environment is important.

Guided learning hours: 40

Credit value: 4

Level: 2

This unit is **mandatory**

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## Unit summaries (cont'd)

### Unit 05 Manage personal performance and development (L/506/1788)

The purpose of the unit is to enable learners to be able to manage personal performance, their own time and workload. Learners will be able to identify their own development needs and fulfil a personal development plan.

Guided learning hours: 18

Credit value: 4

Level: 2

This unit is **mandatory**

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### Unit 06 Communicate verbally with customers (D/506/2119)

In this unit learners will have the opportunity to increase their knowledge of communication techniques. Learners will understand how to listen effectively and identify and adapt their communication styles in order to offer the best customer service.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is **optional**

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### Unit 07 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

This unit is **optional**

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### Unit 08 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 and deal with customer questions and requests.

Guided learning hours: 16

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 09 Make telephone calls to customers (K/506/2155)**

This unit is designed to equip learners with the knowledge to develop their skills to be able 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**

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**Unit 10 Promote additional products and/or services to customers (L/506/2133)**

This unit is designed to develop learners' understanding of the promotional aspect to customer service. Learners will be able to identify opportunities to promote additional products in line with organisational procedures.

Guided learning hours: 14

Credit value: 2

Level: 2

This unit is **optional**

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

This unit is designed to develop learners' understanding of customer service information systems. Learners will be able to record, retrieve and process information in line with organisational procedures.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 12 Exceed customer expectations (Y/506/2135)**

This unit focuses on learners' ability to exceed customer expectations. Learners will be able to identify the differences between customer expectation and needs of the service offer and make offers to customers within the limits of their authority.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 13 Deliver customer service whilst working on customers' premises (T/506/2143)**

This unit aims to develop learners' knowledge of the preparation, attitude and standards expected when visiting customers' premises. Learners will be able to deliver effective customer service showing consideration towards the customer and their premises.

Guided learning hours: 20

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 14 Carry out customer service handovers (T/506/2157)**

The purpose of this unit is to show learners' knowledge of customer service handover procedures, and how to plan, execute and follow up on handovers. Learners will be able to plan and carry out handovers with colleagues in line with organisational procedures.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 15 Resolve customer service problems (A/506/2158)**

This unit aims to provide learners with an understanding of problem-solving techniques. The learner will be able to identify customer service problems, agree a solution to the problem and manage unresolved problems by referring to other sources.

Guided learning hours: 22

Credit value: 5

Level: 2

This unit is **optional**

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**Unit 16 Deliver customer service to challenging customers (F/506/2159)**

This aim of this unit is to provide learners with an understanding of how to deal with challenging customers. Learners will be able to describe the different techniques that can be applied when dealing with challenging customers, to be able to agree a way forward that meets the needs of the customer and organisation.

Guided learning hours: 16

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 17 Develop customer relationships (Y/506/2149)**

This unit is designed to provide learners with an understanding of how to develop customer relationships and the value of customer loyalty and retention to the organisation.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 18 Support customer service improvements (T/506/2160)**

This unit aims to develop learners' understanding of how to identify the different sources of information required to support customer service improvements and to be able to make recommendations based in the information gathered.

Guided learning hours: 12

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 19 Support customers through real-time online customer service (A/506/2161)**

This unit is designed to equip learners with the knowledge to support customers using an online system. Learners will be able to communicate effectively with customers, providing support that will meet their needs.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 20 Use social media to deliver customer service (J/506/2163)**

This unit will enable learners to understand social media platforms and how they can be used within the customer service role. Learners will be able to deal with customer queries and respond in line with organisational procedures.

Guided learning hours: 18

Credit value: 3

Level 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 21 Resolve customers' complaints (R/506/2151)**

In this unit learners will have an opportunity to increase their knowledge of monitoring techniques in relation to customer complaints. Learners will develop the skills to ascertain the cause of the complaint and agree solutions with customers within the limits of their own authority.

Guided learning hours: 22

Credit value: 4

Level: 3

This unit is **optional**

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**Unit 22 Gather, analyse and interpret customer feedback (D/506/2170)**

The aim of this unit is to provide learners with knowledge of the different methods of data collection and analysing techniques. Learners will be able to gather customer feedback and analyse the data to recommend improvements.

Guided learning hours: 24

Credit value: 5

Level: 3

This unit is **optional**

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**Unit 23 Support customers using self-service equipment (H/506/2977)**

The aim of this unit is to increase learners' understanding of how to use self-service equipment and to be able to identify and support when customers need assistance to use the equipment.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 24 Provide post-transaction customer service (K/506/2978)**

The aim of this unit is to provide learners with an understanding of the advantages and disadvantages of post-transaction activity. Learners will be able to provide a post-transaction service to customers in line with organisational procedures.

Guided learning hours: 22

Credit value: 5

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 25 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

This unit is **optional**

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**Unit 26 Manage diary systems (L/506/1807)**

This unit aims to provide learners with an understanding of the management of diary systems. The learner will be able to manage diary systems, obtaining the information needed to make accurate and timely diary entries, keeping them up to date while maintaining the requirements of confidentiality.

Guided learning hours: 12

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 27 Provide reception services (H/506/1814)**

This unit aims to provide learners with an understanding of reception services. Learners will be able to provide reception services, welcoming visitors, directing them to the person they are visiting and recording visitors' arrivals and departures in accordance with organisational procedures and standards.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 28 Contribute to the organisation of an event (L/506/1869)**

The aim of this unit is to provide learners with an understanding of event organisation. Learners will be able to carry out pre-event actions, set up events and carry out post-event actions.

Guided learning hours: 23

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 29 Buddy a colleague to develop their skills (M/506/1895)**

The aim of this unit is to provide learners with the ability to support a buddy colleague carrying out work activities.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 30 Employee rights and responsibilities (L/506/1905)**

This unit aims to provide learners with an understanding of the role of organisations and industries, and will also understand employers' expectations and employees' rights and obligations.

Guided learning hours: 16

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 31 Develop working relationships with colleagues (R/506/1789)**

The aim of this unit is to provide learners with an understanding of the principles of effective team working. Learners will be able to maintain effective working relationships with colleagues and collaborate with colleagues to resolve problems.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 32 Principles of equality and diversity in the workplace (J/506/1806)**

This purpose of this unit is to develop learners' understanding of standards and expectations for equality and diversity in the workplace, with reference to relevant legislation.

Guided learning hours: 10

Credit value: 2

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 33 Processing sales orders (M/502/8587)**

The aim of this unit is to provide learners with an understanding of how to process sales orders. Learners will be able to identify customer requirements following organisational procedures and process orders using different methods of payment.

Guided learning hours: 17

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 34 Meeting customers' after sales needs (R/502/8601)**

This unit will enable learners to communicate with customers following a sale. Learners will be able to fulfil customers' needs, following quality and customer service standards, obtaining customer feedback on the service in order to make recommendations for improvements.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 35 Handling objections and closing sales (M/502/8606)**

The aim of this unit is to equip learners with the knowledge of how to handle sales objections. Learners will be able to establish the nature of the objection, promote the benefits of the product and service to overcome objections and close the sale.

Guided learning hours: 22

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 36 Deal with incidents through a contact centre (K/503/0421)**

The aim of this unit is to equip learners with the knowledge to respond to incoming calls relating to incidents through a contact centre and to gain the knowledge of how to deal with incidents in a professional manner. Learners will be able to use the organisations' communication systems, passing on details of the incident in accordance with the organisational procedures.

Guided learning hours: 40

Credit value: 7

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 37 Carry out direct sales activities in a contact centre (L/503/0394)**

The purpose of the unit is to increase learners' understanding of how to conduct sales in a contact centre. Learners will gain knowledge of the products/services to carry out sales through a contact centre.

Guided learning hours: 15

Credit value: 5

Level: 2

This unit is **optional**

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**Unit 38 Negotiate in a business environment (H/506/1912)**

This unit aims to provide learners with an understanding of the principles and techniques of negotiation skills. Learners will use different negotiation techniques to carry out business negotiation, complying with organisational policies and procedures and legal and ethical requirements.

Guided learning hours: 18

Credit value: 4

Level: 3

This unit is **optional**

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**Unit 39 Bespoke software (F/502/4396)**

The aim of this unit is to equip learners with the ability to use bespoke software, using the appropriate techniques and tools to edit and process information. Learners will use the software effectively to present the information in an appropriate format.

Guided learning hours: 20

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 01 Deliver customer service (A/506/2130)**

The learner will:

- 1 Understand customer service delivery

The learner can:

- 1.1 Explain the relationship between customers' needs and expectations and customer satisfaction
  - 1.2 Describe the features and benefits of an organisation's products and/or services
  - 1.3 Explain the importance of treating customers as individuals
  - 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation
  - 1.5 Explain when and to whom to escalate problems
  - 1.6 Describe **methods of measuring their own effectiveness** in the delivery of customer service
- 

The learner will:

- 2 Understand the relationship between customer service and a brand

The learner can:

- 2.1 Explain the importance of a **brand** to an organisation
  - 2.2 Explain how a brand affects an organisation's customer service offer
  - 2.3 Explain the importance of using **customer service language** that supports a brand promise
  - 2.4 Identify their own role in ensuring that a brand promise is delivered
- 

The learner will:

- 3 Be able to prepare to deal with customers

The learner can:

- 3.1 Keep up to date with an organisation's products and/or services
  - 3.2 Prepare resources that are necessary to deal with customers before starting work
-

**Unit 01 Deliver customer service (A/506/2130) (cont'd)**

The learner will:

- 4 Be able to provide customer service

The learner can:

- 4.1 Maintain organisational standards of presentation and behaviour when providing customer service
  - 4.2 Adapt their own behaviour to meet customers' needs or expectations
  - 4.3 Respond to customers' requests in line with organisational guidelines
  - 4.4 Inform customers of the progress of their requests
  - 4.5 Confirm that customers' expectations have been met in line with the service offer
  - 4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
- 

The learner will:

- 5 Be able to support improvements to customer service delivery

The learner can:

- 5.1 Identify ways that customer service could be improved for an organisation and individuals
  - 5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery
-

**Unit 01 Deliver customer service (A/506/2130) (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 **Features** are characteristics, attributes and qualities of a product or service.
- Benefits** are advantages and uses of a service or product.
- 1.6 **Methods of measuring their own effectiveness** may include, but are not limited to:
- customer feedback
  - peer feedback
  - reviewing performance against targets.
- 2.1 **Brand** is a type of product/service provided by a particular company under a specific name.
- 2.3 **Customer service language** could include phrases such as:
- 'my pleasure'
  - 'no problem'
  - 'have a good day'
  - 'thank you for your custom'.
-



**Unit 02 Understand customers (F/506/2131)**

The learner will:

- 1 Understand different types of customers

The learner can:

- 1.1 Explain the distinctions between internal and external customers
  - 1.2 Explain how **cultural factors** can affect customers' expectations
  - 1.3 Describe the characteristics of challenging customers
  - 1.4 Explain how to identify dissatisfied customers
- 

The learner will:

- 2 Understand the value of customers and their loyalty

The learner can:

- 2.1 Explain how the achievement of the customer **service offer** contributes to enhancing customer loyalty
  - 2.2 Explain the relationship between customer satisfaction and organisational performance
  - 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services
  - 2.4 Explain the potential consequences of customers' dissatisfaction
  - 2.5 Describe different methods of attracting customers and retaining their loyalty
-

**Unit 02 Understand customers (F/506/2131) (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 **Cultural factors** can include:

- stories portrayed in the media
- industry standard setting
- demographics such as age, gender, socio-economic status
- religious, moral views.

2.1 **Service offer** is defined as the extent and limits of the customer service that an organisation is offering.

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**Unit 03 Principles of customer service (J/506/2132)**

The learner will:

- 1 Understand customer service

The learner can:

- 1.1 Explain the purpose and scope of customer service
  - 1.2 Define the term 'service offer'
  - 1.3 Explain the value of a 'service offer' to an organisation
  - 1.4 Explain the importance of delivering consistently high-quality customer service
  - 1.5 Explain the importance of keeping up to date with knowledge of competitors' activities
  - 1.6 Explain barriers to providing effective customer service
  - 1.7 Describe the features of effective follow-up service
- 

The learner will:

- 2 Understand how legal and ethical requirements relate 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 ethical considerations affect customer service
  - 2.4 Explain how equality legislation affects customer service
  - 2.5 Describe how legislation affects the use and storage of customer information
- 

The learner will:

- 3 Understand how to deliver effective customer service

The learner can:

- 3.1 Explain the difference between customers' wants, needs and their expectations
  - 3.2 Explain how to identify customers' needs and expectations
  - 3.3 Explain the importance of managing customers' expectations
  - 3.4 Explain how to behave in a way that meets customers' expectations
  - 3.5 Describe techniques that can be used to put customers at ease and gain their trust
  - 3.6 Explain the importance of following up actions and keeping promises when delivering customer service
-

### **Unit 03 Principles of customer service (J/506/2132) (cont'd)**

The learner will:

- 4 Understand the management of customer service information

The learner can:

- 4.1 Explain how customer service information can be used
  - 4.2 Explain the importance of systems to manage customer service information
  - 4.3 Explain the uses of systems to manage customer service information
  - 4.4 Identify the features of an effective customer complaints process
  - 4.5 Describe the uses of a customer complaints process
- 

#### **Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 04 Understand employer organisations (A/506/1964)**

The learner will:

- 1 Understand organisational structures

The learner can:

- 1.1 Explain the differences between the private sector, public sector and voluntary sector
  - 1.2 Explain the functions of different organisational structures
  - 1.3 Describe the features of different types of legal structures for organisations
- 

The learner will:

- 2 Understand the organisational environment

The learner can:

- 2.1 Describe the internal and external influences on organisations
  - 2.2 Explain the use of different models of analysis in understanding the organisational environment
  - 2.3 Explain why change in the business environment is important
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 05 Manage personal performance and development (L/506/1788)**

The learner will:

- 1 Be able to manage personal performance

The learner can:

- 1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
  - 1.2 Agree criteria for measuring progress and achievement with line manager
  - 1.3 Complete tasks to agreed timescales and quality standards
  - 1.4 Report problems beyond their own level of competence and authority to the appropriate person
  - 1.5 Take action needed to resolve any problems with personal performance
- 

The learner will:

- 2 Be able to manage their own time and workload

The learner can:

- 2.1 Plan and manage workloads and priorities using time management tools and techniques
  - 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
  - 2.3 Explain the benefits of achieving an acceptable 'work-life balance'
- 

The learner will:

- 3 Be able to identify their own development needs

The learner can:

- 3.1 Identify organisational policies relating to personal development
  - 3.2 Explain the need to maintain a positive attitude to feedback on performance
  - 3.3 Explain the potential business benefits of personal development
  - 3.4 Identify their own preferred learning style(s)
  - 3.5 Identify their own development needs from analyses of the role, personal and team objectives
  - 3.6 Use feedback from others to identify their own development needs
  - 3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs
-

**Unit 05 Manage personal performance and development (L/506/1788) (cont'd)**

The learner will:

- 4 Be able to fulfil a personal development plan

The learner can:

- 4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
  - 4.2 Make use of formal development opportunities that are consistent with business needs
  - 4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives
  - 4.4 Review progress against agreed objectives and amend plans accordingly
  - 4.5 Share lessons learned with others using agreed communication methods
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 06 Communicate verbally with customers (D/506/2119)**

The learner will:

- 1 Understand how to communicate verbally with customers

The learner can:

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

The learner will:

- 2 Be able to use customer service language to communicate with customers

The learner can:

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



**Unit 06 Communicate verbally with customers (D/506/2119) (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:**

- 1.3 **Customer service language** may include phrases such as:
- 'my pleasure'
  - 'no problem'
  - 'have a good day'
  - 'thank you for your custom'.
- 1.4 **Questioning techniques** may include, but are not exclusive to:
- open
  - closed
  - verbal
  - written
  - probing
  - clarification.
- 1.5 A **verbal signal** is a phrase or statement said by the customer.
- A **non-verbal signal** is the body language of the customer.
-

**Unit 07 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 data protection in 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 07 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** includes those of a legal nature.
-

**Unit 08 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
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 09 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 09 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 are not exclusive to:
- open
  - closed
  - verbal
  - written
  - probing
  - clarification.
-

**Unit 10 Promote additional products and/or services to customers (L/506/2133)**

The learner will:

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

The learner can:

- 1.1 Describe organisational policies and procedures on the promotion of additional products and/or services
  - 1.2 Explain the importance of keeping product/service knowledge up to date
  - 1.3 Explain how to match products and/or services to customer needs
  - 1.4 Describe **techniques** to promote additional products and/or services
- 

The learner will:

- 2 Be able to promote additional products and/or services to customers

The learner can:

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

**Unit 10 Promote additional products and/or services to customers (L/506/2133) (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 **Techniques** may include, but are not exclusive to:

- verbal communication
- written communication
- product placement.

2.1 The **customer experience** can be in relation to both internal and external customers.

---



**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
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 12 Exceed customer expectations (Y/506/2135)**

The learner will:

- 1 Understand how to exceed customer expectations

The learner can:

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

The learner will:

- 2 Be able to exceed customer expectations

The learner can:

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

## Unit 12 Exceed customer expectations (Y/506/2135) (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 **Organisational policies** will be specific to the organisation but could include:
- time in which goods can be returned (returns policy)
  - gift receipts
  - condition in which goods can be returned
  - validity of gift vouchers – expiry date
  - availability of the service offer
  - restrictions on the service offer, eg one per household, per customer.
- 1.3 **Adding value** is the extra, over and above the basic product or service offer that an organisation makes to its customers.
- 2.4 **Offers to customers** could include:
- providing promotional vouchers
  - offering additional service within organisational guidelines
  - offering additional services that have been advertised.
-

**Unit 13 Deliver customer service whilst working on customers' premises (T/506/2143)**

The learner will:

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

The learner can:

- 1.1 Describe the preparations that need to be made prior to a visit
  - 1.2 Explain the importance of being positive about the product and/or service
  - 1.3 Explain organisational standards of presentation, behaviour and communication
  - 1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
  - 1.5 Explain how to identify possible **risks** relating to the work to be carried out
  - 1.6 Explain the way in which legislation affects the work to be carried out
- 

The learner will:

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

The learner can:

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

**Unit 13 Deliver customer service whilst working on customers' premises (T/506/2143) (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:**

1.5 **Risks** are situations or hazards that could cause harm, danger or exposure to danger.

---

**Unit 14 Carry out customer service handovers (T/506/2157)**

The learner will:

- 1 Understand the customer service handover process

The learner can:

- 1.1 Explain an organisation's **customer service handover** procedures
  - 1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
  - 1.3 Explain why, when and how to set reminders to follow up on actions handed over to others
  - 1.4 Explain levels of their own responsibility in the customer service handover process
- 

The learner will:

- 2 Be able to plan customer service handovers

The learner can:

- 2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members
  - 2.2 Agree with colleagues when to pass **customer service issues** from one person to another
  - 2.3 Agree methods of information exchange
- 

The learner will:

- 3 Be able to carry out customer service handovers

The learner can:

- 3.1 Explain to customers to whom and why a handover is being made
  - 3.2 Exchange information with colleagues in line with organisational procedures
  - 3.3 Check that actions required by others following handovers have been completed
  - 3.4 Identify **further actions** when the activities required by others have not been completed
  - 3.5 Share feedback with colleagues to make improvements to handover processes
-

**Unit 14 Carry out customer service handovers (T/506/2157) (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 **Customer service handover** is when one member of staff presents the needs of the customer to another member of staff. This could be due to a range of factors, including:
    - shift change
    - escalation.
  
  - 2.2 **Customer service issues** may include, but are not exclusive to:
    - complaints
    - compliments
    - linguistic or cultural barriers.
  
  - 3.4 **Further actions** could include, but are not exclusive to:
    - identifying why the action has not been completed
    - identifying implications to customer
    - escalating to line manager or appropriate colleague.
-

**Unit 15 Resolve customer service problems (A/506/2158)**

The learner will:

- 1 Understand the resolution of customer service problems

The learner can:

- 1.1 Describe an organisation's customer service and complaints procedures
  - 1.2 Describe techniques to identify customer service problems and their causes
  - 1.3 Describe techniques to deal with situations where customers become agitated or angry
  - 1.4 Explain the limits of their own authority for resolving customers' problems and making promises
  - 1.5 Explain the purpose of encouraging customers to provide feedback
  - 1.6 Describe methods used to encourage customers to provide feedback
- 

The learner will:

- 2 Be able to resolve customer service problems

The learner can:

- 2.1 Identify the nature and cause of customer service problems
  - 2.2 Identify workable options for resolving problems within organisational guidelines
  - 2.3 Use the most appropriate method of communication for dealing with customers
  - 2.4 Agree with customers the option that best meets their needs and those of the organisation
  - 2.5 Keep customers informed of progress
  - 2.6 Fulfil promises made to customers during the resolution process
  - 2.7 Share customer feedback with **others** to improve the resolution of customer service problems
  - 2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
- 

The learner will:

- 3 Be able to manage unresolved customer service problems

The learner can:

- 3.1 Explain to customers the reasons why problems cannot be resolved
  - 3.2 Refer customers to **other sources of help** if their problems cannot be resolved
-



**Unit 15 Resolve customer service problems (A/506/2158) (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:**

- 2.7 **Others** may include colleagues, supervisors, managers.
  - 3.2 **Other sources of help** may be internal or external to an organisation, for example, managers or the Citizens Advice Bureau.
-

**Unit 16 Deliver customer service to challenging customers (F/506/2159)**

The learner will:

- 1 Understand the delivery of customer service to challenging customers

The learner can:

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

The learner will:

- 2 Be able to deal with challenging customers

The learner can:

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

**Unit 16 Deliver customer service to challenging customers (F/506/2159) (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 **Challenging customers** may have:
- problems/questions
  - additional needs/requirements
  - poor communication skills and language barriers.
- 1.1 **Challenging customers** may be:
- angry
  - unreasonable
  - confused.
- 1.3 **Behaviours** may include, but are not limited to:
- aggression
  - frustration
  - irritation
  - confrontation.
-

**Unit 17 Develop customer relationships (Y/506/2149)**

The learner will:

- 1 Understand how to develop customer relationships

The learner can:

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

The learner will:

- 2 Be able to develop relationships with customers

The learner can:

- 2.1 Give help and information that meets or exceeds **customers' expectations**
  - 2.2 Identify new ways of helping customers based on their feedback
  - 2.3 Share feedback from customers with **others**
  - 2.4 Identify added value that the organisation could offer customers
  - 2.5 Bring to customers' attention products or services that may interest them
-

**Unit 17 Develop customer relationships (Y/506/2149) (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:**

- 1.3 **Customer expectations** are what people think should happen and how they think they should be treated when asking for or receiving customer service.
- 1.5 **Alternative service offers** may include:
- product replacement or upgrade
  - refund
  - compensation
  - additional support
  - extended warranties.
- 1.6 **Customer Relationship Management systems** may be software applications or paper-based systems to manage customer data.
- 2.1 **Customer expectations** are what people think should happen and how they think they should be treated when asking for or receiving customer service.
- 2.3 **Others** may include colleagues, supervisors, managers.
-

**Unit 18 Support customer service improvements (T/506/2160)**

The learner will:

- 1 Understand how to support customer service improvements

The learner can:

- 1.1 Describe different **sources of information** that may help identify ways of improving customer service
  - 1.2 Describe the constraints on suggesting improvements to customer service
  - 1.3 Explain the limits of their own authority in implementing improvements
- 

The learner will:

- 2 Be able to identify the potential for improvements to customer service

The learner can:

- 2.1 Use information from a range of sources to understand the customer experience
  - 2.2 Identify potential areas where customer service could be improved from an analysis of information
  - 2.3 Make recommendations for improvement that are based on evidence from analysed information
- 

The learner will:

- 3 Be able to support the implementation of improvements to customer service

The learner can:

- 3.1 Implement agreed improvements within the limits of their own authority
  - 3.2 Inform customers of improvements to customer service
  - 3.3 Identify the impact of improvements to customer service and feed back to **relevant people**
-

**Unit 18 Support customer service improvements (T/506/2160) (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 **Sources of information** may include, but are not limited to:
- customer surveys
  - research studies
  - analysis of data.
- 3.3 **Relevant people** may include, but are not limited to:
- colleagues
  - managers
  - shareholders.
-

**Unit 19 Support customers through real-time online customer service (A/506/2161)**

The learner will:

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

The learner can:

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

The learner will:

- 2 Be able to establish the customer service support needed by customers

The learner can:

- 2.1 Identify customers' familiarity with the site
  - 2.2 Identify the difficulties faced by customers when navigating websites
  - 2.3 Identify the support for customers that will meet their needs
- 

The learner will:

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

The learner can:

- 3.1 Step through screen sequences while the customer operates the system
- 3.2 Communicate with customers **in terms they can understand**
- 3.3 Inform customers of what is happening and why certain steps are required
- 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through online customer service



**Unit 19 Support customers through real-time online customer service (A/506/2161) (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 **Online customer service systems** could refer to:
    - automated online assistants
    - instant messages
    - technical support operator/technician.
  
  - 3.2 **In terms they can understand** – in line with organisation's communication guidance, using lay terms rather than jargon.
-

**Unit 20 Use social media to deliver customer service (J/506/2163)**

The learner will:

- 1 Understand social media in a business environment

The learner can:

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

The learner will:

- 2 Be able to deal with customers using social media

The learner can:

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

**Unit 20 Use social media to deliver customer service (J/506/2163) (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 **Social media platforms** may include, but are not limited to:
- Twitter
  - Facebook
  - online forums.
-

**Unit 21 Resolve customers' complaints (R/506/2151)**

The learner will:

- 1 Understand the monitoring and resolution of customers' complaints

The learner can:

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

The learner will:

- 2 Be able to deal with customers' complaints

The learner can:

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

**Unit 21 Resolve customers' complaints (R/506/2151) (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 **Monitoring techniques** may include, but are not limited to:  
record keeping:
- customer contact systems
  - e-mails
  - letters
  - task-specific documents.
- 1.2 **Negotiating techniques** may include, but are not exclusive to:
- compensation
  - replacement
  - cost reduction
  - upgrade
  - standard communication
  - referral to specialist team.
- 1.4 **Conflict management techniques** may include, but are not limited to:
- standard communication
  - referral to specialist team
  - explanation at source
  - 'second facing' at source.
- 1.5 **Organisational procedures** may include, but are not limited to:
- explanation at source
  - 'second facing' at source
  - compensation
  - replacement
  - cost reduction
  - upgrade
  - standard communication
  - referral to specialist team.
-

**Unit 22 Gather, analyse and interpret customer feedback (D/506/2170)**

The learner will:

- 1 Understand how to gather, analyse and interpret customer feedback

The learner can:

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

The learner will:

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

The learner can:

- 2.1 Identify the objectives of collecting customer feedback
  - 2.2 Justify the reasons for selecting different **data collection methods**
  - 2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
- 

The learner will:

- 3 Be able to gather customer feedback

The learner can:

- 3.1 Collect customer feedback using the sampling frame identified in a customer service plan
  - 3.2 **Record data** in a way that makes analysis straightforward
  - 3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures
-

## **Unit 22 Gather, analyse and interpret customer feedback (D/506/2170) (cont'd)**

The learner will:

- 4 Be able to analyse and interpret customer feedback to recommend improvements

The learner can:

- 4.1 Use **data analysis methods** to identify patterns and trends in customer feedback
  - 4.2 Use the findings of a data analysis to identify areas for improvement to customer service
  - 4.3 Present the findings of an analysis in the agreed format
  - 4.4 Recommend improvements in response to the findings of an analysis
-

**Unit 22 Gather, analyse and interpret customer feedback (D/506/2170) (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:**

- 1.3 **Bias** refers to inclination or prejudice for or against.
- 1.5 **Techniques to analyse customer feedback** may include:
- verifying data
  - identifying over-arching themes
  - highlighting 'quick wins' and 'red alerts'.
- 1.6 **Techniques to monitor the quality of data collected** may include:
- sampling
  - monitoring
  - review of methods used.
- 1.8 A **validation issue** is something that affects the accuracy of data.
- 1.9 **Anonymising comments** refers to ensuring that they do not contain information which reveals someone's identity.
- 2.2 **Data collection methods** could include:
- surveys
  - monitoring social media
  - comments boxes
  - email/contact forms.
- 3.2 **Record data** in line with organisational procedures.
- 4.1 **Data analysis methods** (for quantitative and qualitative data) eg spreadsheet, software, manual analysis.
-



**Unit 23 Support customers using self-service equipment (H/506/2977)**

The learner will:

- 1 Understand how to support customers using self-service equipment

The learner can:

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

The learner will:

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

The learner can:

- 2.1 Identify signs that show when a customer is having difficulty with the self-service equipment
  - 2.2 Identify a style and level of intervention that meets customers' needs
- 

The learner will:

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

The learner can:

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

**Unit 23 Support customers using self-service equipment (H/506/2977) (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 **Self-service equipment** is a machine that enables a customer to pay for purchases without direct input from the organisation's staff.

**Unit 24 Provide post-transaction customer service (K/506/2978)**

The learner will:

- 1 Understand post-transaction customer service

The learner can:

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

The learner will:

- 2 Be able to provide post-transaction customer service

The learner can:

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

**Unit 24 Provide post-transaction customer service (K/506/2978) (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 **Policies and procedures** explained should be in relation to the **organisation** where the learner carries out post-transactional customer service (LO2).
  - 1.3 Where possible the explanation should be in relation to **sales contracts, guarantees and warranties** provided by the **organisation**.
  - 1.4 Specific, relevant examples of **legislation and regulation** should be referred to and explained.
  - 2.2 The learner should demonstrate that they are able to recognise **unplanned opportunities** and take appropriate action to provide customer service over and above what would normally be expected.
  - 2.5 The learner should demonstrate that they actively consider ways of **enhancing customer satisfaction** and **make recommendations** which are feasible within their real work environment. Learners should make more than one recommendation over time.
-

**Unit 25 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:
    - employers
    - employees
  - 1.2 Describe two 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
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 26 Manage diary systems (L/506/1807)**

The learner will:

- 1 Understand the management of diary systems

The learner can:

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

The learner will:

- 2 Be able to manage diary systems

The learner can:

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

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 27 Provide reception services (H/506/1814)**

The learner will:

- 1 Understand reception services

The learner can:

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

The learner will:

- 2 Be able to provide a reception service

The learner can:

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

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 28 Contribute to the organisation of an event (L/506/1869)**

The learner will:

- 1 Understand event organisation

The learner can:

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

The learner will:

- 2 Be able to carry out pre-event actions

The learner can:

- 2.1 Identify venue requirements for an event
  - 2.2 Obtain resources within the agreed timescales
  - 2.3 Distribute pre-event documentation to delegates in accordance with the event plan
  - 2.4 Co-ordinate attendee responses within the agreed timescale
  - 2.5 Identify any special requirements of event attendees
- 

The learner will:

- 3 Be able to set up an event

The learner can:

- 3.1 Set up layout and resources in accordance with the event plan
  - 3.2 Confirm that all identified resources are in place and meet requirements
  - 3.3 Behave in a way that maintains organisational values and standards
- 

The learner will:

- 4 Be able to carry out post-event actions

The learner can:

- 4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract
  - 4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event
-



**Unit 28 Contribute to the organisation of an event (L/506/1869) (cont'd)**

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 29 Buddy a colleague to develop their skills (M/506/1895)**

The learner will:

- 1 Understand how to buddy a colleague

The learner can:

- 1.1 Describe what is expected of a buddy
  - 1.2 Explain techniques to give positive feedback and constructive criticism
  - 1.3 Explain techniques to establish rapport with a buddy
- 

The learner will:

- 2 Be able to plan to buddy a colleague

The learner can:

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

The learner will:

- 3 Be able to support a buddy colleague carrying out work activities

The learner can:

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

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 30 Employee rights and responsibilities (L/506/1905)**

The learner will:

- 1 Understand the role of organisations and industries

The learner can:

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

The learner will:

- 2 Understand employers' expectations and employees' rights and obligations

The learner can:

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

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 31 Develop working relationships with colleagues (R/506/1789)**

The learner will:

- 1 Understand the principles of effective team working

The learner can:

- 1.1 Outline the benefits of effective team working
  - 1.2 Describe how to give feedback constructively
  - 1.3 Explain conflict management techniques that may be used to resolve team conflicts
  - 1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
  - 1.5 Explain the importance of warning colleagues of problems and changes that may affect them
- 

The learner will:

- 2 Be able to maintain effective working relationships with colleagues

The learner can:

- 2.1 Recognise the contribution of colleagues to the achievement of team objectives
  - 2.2 Treat colleagues with respect, fairness and courtesy
  - 2.3 Fulfil agreements made with colleagues
  - 2.4 Provide support and constructive feedback to colleagues
- 

The learner will:

- 3 Be able to collaborate with colleagues to resolve problems

The learner can:

- 3.1 Take others' viewpoints into account when making decisions
  - 3.2 Take ownership of problems within own level of authority
  - 3.3 Take action to minimise disruption to business activities within their own level of authority
  - 3.4 Resolve problems within their own level of authority and agreed contribution
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 32 Principles of equality and diversity in the workplace (J/506/1806)**

The learner will:

- 1 Understand the implications of equality legislation

The learner can:

- 1.1 Define the concept 'equality and diversity'
  - 1.2 Describe the legal requirements for equality of opportunity
  - 1.3 Describe the role and powers of organisations responsible for equality
  - 1.4 Explain the benefits of equal opportunities and diversity
  - 1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation
- 

The learner will:

- 2 Understand organisational standards and expectations for equality and diversity and context in the workplace

The learner can:

- 2.1 Explain how organisational policies on equality and diversity translate into day-to-day activity in the workplace
  - 2.2 Describe their own responsibilities for equality and diversity in the workplace
  - 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace
- 

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 33 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
-

**Unit 33 Processing sales orders (M/502/8587) (cont'd)**

**Assessment guidance**

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 34 Meeting customers' after sales needs (R/502/8601)**

The learner will:

- 1 Be able to investigate customers' 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 qualification page on the NCFE website.

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**Unit 35 Handling objections and closing sales (M/502/8606)**

The learner will:

- 1 Understand how to handle sales objections

The learner can:

- 1.1 Explain the difference between standard and non-standard sales objections
  - 1.2 Explain how to clarify objections and identify potential sales opportunities from them
  - 1.3 Describe how to use questioning techniques to explore and resolve customer issues
  - 1.4 Explain how to empathise with and reassure the customer
  - 1.5 Explain the difference between hypothetical and real objections
  - 1.6 Explain how knowledge of products and services can be used to answer objections
  - 1.7 Explain how competitor activity may affect the potential sale
  - 1.8 Describe how industry/sector pricing structures may have an impact on sales objections
  - 1.9 Explain the scope of authority and responsibility when dealing with objections
  - 1.10 State who to go to when in need of support to overcome objections
- 

The learner will:

- 2 Understand how to close the sale

The learner can:

- 2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale
  - 2.2 Explain how to perform a trial close
  - 2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
  - 2.4 Explain potential barriers to closing the sale
  - 2.5 Explain a range of ways to close the sale
- 

The learner will:

- 3 Be able to handle objections

The learner can:

- 3.1 Clarify the nature and extent of objections
  - 3.2 Explain to the customer the concessions available within the scope of authority
  - 3.3 Follow organisational procedures for dealing with objections
  - 3.4 Promote the benefits of products and/or services to overcome objections
  - 3.5 Use testimonials to overcome objections
  - 3.6 Refer to those in authority when dealing with objections outside the scope of own authority
-

### **Unit 35 Handling objections and closing sales (M/502/8606) (cont'd)**

The learner will:

4 Be able to close the sale

The learner can:

- 4.1 Perform a trial close and ask for the order when objections have been met
  - 4.2 Make use of add-on, up-selling or cross-selling opportunities
  - 4.3 Follow organisational procedures for accepting confirmation of an order
- 

#### **Assessment guidance**

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 36 Deal with incidents through a contact centre (K/503/0421)**

The learner will:

- 1 Be able to deal with incidents through a contact centre

The learner can:

- 1.1 Respond to incoming calls in a calm and professional manner
  - 1.2 Maintain control of the conversation
  - 1.3 Record the contact and information in an incident log in accordance with organisational procedures
  - 1.4 Assess and prioritise reported incidents in accordance with organisational procedures
  - 1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures
  - 1.6 Provide information, advice and support in response to requests in accordance with organisational procedures
  - 1.7 Escalate incident responses in accordance with organisational procedures
- 

The learner will:

- 2 Be able to use contact centre communications systems to deploy incident management resources

The learner can:

- 2.1 Communicate with external organisations in accordance with organisational procedures
  - 2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident
  - 2.3 Use agreed conventions of wording, style and approach appropriate for different communication media
-

**Unit 36 Deal with incidents through a contact centre (K/503/0421) (cont'd)**

The learner will:

- 3 Understand how to deal with incidents in a contact centre

The learner can:

- 3.1 Describe the incident management services offered by the contact centre
  - 3.2 Describe the impact of regulation or legislation on incident management
  - 3.3 Describe the purpose and use of decision trees
  - 3.4 Describe how to determine the appropriate allocation of resources to incidents
  - 3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response
  - 3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
  - 3.7 Describe standard wording and codes used by the organisation when dealing with incident management
  - 3.8 Describe the type and extent of resources available for deployment in incident management
- 

**Assessment guidance**

This unit must be assessed in line with Skills CFA Contact Centre Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 37 Carry out direct sales activities in a contact centre (L/503/0394)**

The learner will:

- 1 Be able to gather information needed for direct sales activities in a contact centre

The learner can:

- 1.1 Assemble information about products and/or services that support direct sales
  - 1.2 Obtain from customers sufficient information to support direct sales activities
  - 1.3 Create sales opportunities by making links between information provided by customers and products and/or services
  - 1.4 Find potential new customers for products and/or services
- 

The learner will:

- 2 Be able to carry out direct sales to customers through a contact centre

The learner can:

- 2.1 Establish customers' identity in accordance with organisational procedures
  - 2.2 Check customers' wishes and needs
  - 2.3 Identify possible matches with products and/or services from information provided by customers
  - 2.4 Explain to customers the features and benefits of products and/or services for sale
  - 2.5 Adapt their sales approach and style to meet customer preferences
  - 2.6 Maximise opportunities for cross-selling and up-selling
  - 2.7 Complete the authorisation or payment in accordance with organisational procedures
- 

The learner will:

- 3 Be able to keep direct sales records within a contact centre

The learner can:

- 3.1 Identify the information about customers, products and/or services that should be recorded during the sales process
  - 3.2 Record customer, product and/or service information in accordance with organisational procedures
-

**Unit 37 Carry out direct sales activities in a contact centre (L/503/0394) (cont'd)**

The learner will:

- 4 Be able to comply with regulations and legislation during direct sales in a contact centre

The learner can:

- 4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre
  - 4.2 Ensure compliance with regulations during direct selling through a contact centre
- 

The learner will:

- 5 Understand how to conduct sales activities in a contact centre

The learner can:

- 5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre
  - 5.2 Describe the organisational policies and procedures for direct sales through a contact centre
  - 5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
  - 5.4 Describe the common objections and questions raised by customers during direct selling
  - 5.5 Explain how to identify cross-selling and up-selling opportunities
  - 5.6 Describe different methods of researching potential new customers
  - 5.7 Explain how to retrieve information from organisational sales records
  - 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling
- 

**Assessment guidance**

This unit must be assessed in line with Skills CFA Contact Centre Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 38 Negotiate in a business environment (H/506/1912)**

The learner will:

- 1 Understand the principles underpinning negotiation

The learner can:

- 1.1 Describe the requirements of a negotiation strategy
  - 1.2 Explain the use of different negotiation techniques
  - 1.3 Explain how research on the other party can be used in negotiations
  - 1.4 Explain how cultural differences might affect negotiations
- 

The learner will:

- 2 Be able to prepare for business negotiations

The learner can:

- 2.1 Identify the purpose, scope and objectives of the negotiation
  - 2.2 Explain the scope of their own authority for negotiating
  - 2.3 Prepare a negotiating strategy
  - 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
  - 2.5 Assess the likely objectives and negotiation stances of the other party
  - 2.6 Research the strengths and weaknesses of the other party
- 

The learner will:

- 3 Be able to carry out business negotiations

The learner can:

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

**Assessment guidance**

There is no assessment guidance available for this unit.

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**Unit 39 Bespoke software (F/502/4396)**

The learner will:

- 1 Input and combine information using bespoke applications

The learner can:

- 1.1 Input relevant information accurately so that it is ready for processing
  - 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software
  - 1.3 Respond appropriately to data entry error messages
- 

The learner will:

- 2 Use appropriate structures to organise and retrieve information efficiently

The learner can:

- 2.1 Describe what functions to apply to structure and layout information effectively
  - 2.2 Select and use appropriate structures and/or layouts to organise information
  - 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
- 

The learner will:

- 3 Use the functions of the software effectively to process and present information

The learner can:

- 3.1 Select and use appropriate tools and techniques to edit, process and format information
  - 3.2 Check information meets needs, using IT tools and making corrections as necessary
  - 3.3 Select and use appropriate methods to present information
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk IT User Assessment Strategy.

Please visit the qualification page on the NCFE website.

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# Section 4

## 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>Perform</b>	Do something (take an action/follow an instruction) which the question or task asks or requires
<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>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 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**

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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 guidance.

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

## 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)

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

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