

<b>Unit Title:</b>	<b>Organisational procedures for delivering customer service</b>
Unit number	2
Level:	1
Credit value:	2
Guided learning hours:	15
Unit reference number:	Y/504/6243
Unit expiry date:	31/12/2017

## Unit purpose and aim

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This unit is about knowing how to deal with different types of customer in line with organisational procedures. Learners will be expected to recognise different customer problems, know how to demonstrate appropriate behaviours when dealing with such problems and display an understanding of when problems may need to be progressed to a superior.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Know how to follow organisational practices and procedures when delivering customer service</p>	<p><b>The Learner can:</b></p> <p>1.1 Describe organisational practices and procedures relating to customer service</p> <p>1.2 State why it is important to follow organisational practices and procedures when delivering customer service</p> <p>1.3 Outline the importance of confidentiality when delivering customer service in an organisation</p> <p>1.4 Identify the different types of confidential information that may be collected when delivering customer service in an organisation</p> <p>1.5 Outline the importance of not discriminating against customers when delivering customer service in an organisation</p>	<p>Candidates should have knowledge of:</p> <ul style="list-style-type: none"> <li>• the difference between a practice and procedure</li> <li>• the internal practices and procedures of an organisation relating to customer service, eg: <ul style="list-style-type: none"> <li>▪ time management</li> <li>▪ targets</li> <li>▪ rules of conduct</li> <li>▪ personal appearance</li> <li>▪ appropriate use of equipment</li> <li>▪ awareness of complaint's procedure, customer charter, mission statement</li> </ul> </li> <li>• why it is important to follow internal practices and procedures, eg: <ul style="list-style-type: none"> <li>▪ presenting positive organisational impression</li> <li>▪ using appropriate communication/ body language/behaviour</li> <li>▪ having knowledge of products and/or services</li> <li>▪ knowing limits of own authority</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<p>Candidates should have knowledge of the following when delivering customer service in a chosen organisation:</p> <ul style="list-style-type: none"> <li>• the importance of confidentiality</li> <li>• the types of confidential information that may be collected</li> <li>• the importance of not discriminating against customers</li> </ul>
<p>2 Know how to deal with customer service problems</p>	<p>2.1 Identify typical customer service problems</p> <p>2.2 Describe how to respond to customer service problems in line with organisational procedures</p> <p>2.3 Outline how to refer customer service problems including:</p> <ul style="list-style-type: none"> <li>• when to refer</li> <li>• the communication method to use</li> <li>• who to inform/refer to</li> <li>• what information to pass on</li> </ul>	<ul style="list-style-type: none"> <li>• Candidates will need to identify typical problems in relation to a chosen organisation</li> <li>• Responding to problems may include: <ul style="list-style-type: none"> <li>▪ communication methods used</li> <li>▪ language used</li> <li>▪ timescales</li> <li>▪ referring an issue to a colleague</li> </ul> </li> <li>• Candidates will need to know the types of problems they should refer and the organisational procedures to follow when referring a problem</li> </ul>

## Assessment

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This qualification is internally assessed by centre staff and externally moderated by OCR Moderators.

## Guidance on assessment and evidence requirements

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The evidence requirements for this unit are detailed on the corresponding OCR Candidate Evidence Checklist. This can be found on the Level 1 Principles of Customer Service web page on the OCR website ([www.ocr.org.uk](http://www.ocr.org.uk)). If candidates are submitting a portfolio of evidence, a Candidate Evidence Checklist must be completed to signpost where the evidence requirements have been met.

The OCR Candidate Evidence Sheets have been designed to allow candidates to sufficiently meet all assessment criteria and evidence requirements contained within each unit. Therefore, if candidates have completed the OCR-produced Candidate Evidence Sheets, completion of an Evidence Checklist is not required.

Candidate Evidence Sheets can be found on the Principles of Customer Service web pages on the OCR website ([www.ocr.org.uk](http://www.ocr.org.uk)).

## Functional skills signposting

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Training provided for customer service may help to prepare candidates for the functional skills assessment (eg report writing may be good preparation for English). It is likely however that further training would be needed to fully prepare candidates for functional skills assessment.

## National Occupational Standards (NOS) mapping/signposting

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This unit maps to aspects of units F2 and C3 competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

## Resources

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OCR Candidate Evidence Sheets have been produced to support candidates in producing appropriate evidence for this qualification. Centres may choose to:

- tailor these for candidates
- use these as a benchmark for devising their own evidence sheets to aid candidates

If centre-produced evidence sheets are used, these must allow candidates to achieve all evidence requirements contained on the OCR Evidence Checklists.

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)