

Customer Service Level 2 Units

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Title	Communicate verbally with customers	
Skills CFA Reference	CS 5	
Level	2	
Credit Value	3	
GLH	14	
Unit Reference No.	D/506/2119	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to communicate verbally with customers	<ul style="list-style-type: none"> 1.1 Explain the importance of effective communication in customer service 1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience 1.3 Explain why “customer service language” is used 1.4 Describe different questioning techniques that can be used when communicating with customers 1.5 Describe verbal and non-verbal signals that show how a customer may be feeling 1.6 Describe the types of information needed when communicating verbally with customers 	
2. Be able to use customer service language to communicate with customers	<ul style="list-style-type: none"> 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 	

	<p>2.9 Check that customers have understood what has been communicated</p> <p>2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers</p>
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Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA3 Communicate effectively with customers • CFACSB6 Use questioning techniques when delivering customer service
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	31 August 2017

Title	Communicate with customers in writing	
Skills CFA Reference	CS 6	
Level	2	
Credit Value	3	
GLH	20	
Unit Reference No.	T/506/2126	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes 1.2 Describe practices for producing different forms of written communications 1.3 Describe the potential benefits and limitations associated with communicating with customers in writing 1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing	
2. Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication 2.2 Gather the information needed to draft the communication 2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer	
3. Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs 3.3 Record decisions and actions taken and the reasons for them 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating	

	with customers in writing
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Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSA13 Deal with customers in writing or electronically
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Deliver customer service	
Skills CFA Reference	CS 7	
Level	2	
Credit Value	5	
GLH	27	
Unit Reference No.	A/506/2130	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand customer service delivery	1.1 Explain the relationship between customers' needs and expectations and customer satisfaction 1.2 Describe the features and benefits of an organisation's products and/or services 1.3 Explain the importance of treating customers as individuals 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation 1.5 Explain when and to whom to escalate problems 1.6 Describe methods of measuring their own effectiveness in the delivery of customer service	
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to an organisation 2.2 Explain how a brand affects an organisation's customer service offer 2.3 Explain the importance of using customer service language that supports a brand promise 2.4 Identify their own role in ensuring that a brand promise is delivered	
3. Be able to prepare to deal with customers	3.1 Keep up to date with an organisation's products and/or services 3.2 Prepare resources that are necessary to deal with customers before starting work	

<p>4. Be able to provide customer service</p>	<p>4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>4.2 Adapt their own behaviour to meet customers' needs or expectations</p> <p>4.3 Respond to customers' requests in line with organisational guidelines</p> <p>4.4 Inform customers of the progress of their requests</p> <p>4.5 Confirm that customers' expectations have been met in line with the service offer</p> <p>4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service</p>
<p>5. Be able to support improvements to customer service delivery</p>	<p>5.1 Identify ways that customer service could be improved for an organisation and individuals</p> <p>5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery</p>

Additional Information about the unit	
<p>Unit expiry date</p>	<p>August 31 2014</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA1 Maintain a positive and customer-friendly attitude • CFACSA2 Behave in a way that gives a good customer service impression • CFACSA4 Give customers a positive impression of yourself and your organisation • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA8 Make customer service personal • CFACSB1 Do your job in a customer friendly way • CFACSB2 Deliver reliable customer service • CFACSF2 Deliver customer service

	within the rules
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Understand customers	
Skills CFA Reference	CS 8	
Level	2	
Credit Value	2	
GLH	17	
Unit Reference No.	F/506/2131	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers	
2. Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSF3 Show understanding of customer service principles • CFACSB15 Build and maintain effective customer relations
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other	Skills CFA

appropriate body (if required)	
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Principles of customer service	
Skills CFA Reference	CS 9	
Level	2	
Credit Value	4	
GLH	34	
Unit Reference No.	J/506/2132	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand customer service	1.1 Explain the purpose and scope of customer service 1.2 Define the term “service offer” 1.3 Explain the value of a “service offer” to an organisation 1.4 Explain the importance of delivering consistently high quality customer service 1.5 Explain the importance of keeping up to date with knowledge of competitors’ activities 1.6 Explain barriers to providing effective customer service 1.7 Describe the features of effective follow-up service	
2. Understand how legal and ethical requirements relate to customer service	2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service 2.2 Describe how health, safety and environmental legislation affects customer service delivery 2.3 Explain how ethical considerations affect customer service 2.4 Explain how equality legislation affects customer service 2.5 Describe how legislation affects the use and storage of customer information	

<p>3. Understand how to deliver effective customer service</p>	<p>3.1 Explain the difference between customers' wants, needs and their expectations</p> <p>3.2 Explain how to identify customers' needs and expectations</p> <p>3.3 Explain the importance of managing customers' expectations</p> <p>3.4 Explain how to behave in a way that meets customers' expectations</p> <p>3.5 Describe techniques that can be used to put customers at ease and gain their trust</p> <p>3.6 Explain the importance of following up actions and keeping promises when delivering customer service</p>
<p>4. Understand the management of customer service information</p>	<p>4.1 Explain how customer service information can be used</p> <p>4.2 Explain the importance of systems to manage customer service information</p> <p>4.3 Explain the uses of systems to manage customer service information</p> <p>4.4 Identify the features of an effective customer complaints process</p> <p>4.5 Describe the uses of a customer complaints process</p>

Additional Information about the unit	
<p>Unit expiry date</p>	<p>August 31 2014</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA6 Process information about customers • CFACSB2 Deliver reliable customer service • CFACSB4 Recognise diversity when delivering customer service • CFACSB12 Maintain and develop a healthy and safe customer service environment • CFACSF3 Show understanding of customer service principles
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Support for the unit from an SSC or other</p>	<p>Skills CFA</p>

appropriate body (if required)	
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Deal with incoming telephone calls from customers	
Skills CFA Reference	CS 10	
Level	2	
Credit Value	3	
GLH	16	
Unit Reference No.	H/506/2154	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to deal with incoming customer calls	1.1 Explain why an organisation should have guidance on dealing with telephone calls 1.2 Explain why an organisation should have an identity checking process 1.3 Explain the importance of keeping customer information up to date 1.4 Explain the importance of keeping customers informed of the progress of their call 1.5 Describe how body language and facial expressions can be detected over the telephone 1.6 Describe different questioning techniques used when dealing with incoming calls 1.7 Explain how to handle abusive calls	
2. Be able to establish the purpose of incoming customer calls	2.1 Verify the identity of callers in line with organisational guidelines 2.2 Speak clearly, concisely and politely using speech and tone to create a rapport 2.3 Adapt their own communication style to meet customers' needs 2.4 Listen actively to what customers are saying to collect as much information as possible 2.5 Use questioning techniques that are appropriate to the conversation 2.6 Record information in line with organisational guidelines	
3. Be able to deal with customer questions	3.1 Respond in a way that best meets customer and organisational	

and requests	<p>requirements</p> <p>3.2 Give clear and concise information that meets customers' needs</p> <p>3.3 Manage the length of the conversation</p> <p>3.4 Confirm that the customer is satisfied with the outcomes of the conversation</p> <p>3.5 Complete agreed post-call follow up actions</p>
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Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFACSA11 Deal with incoming telephone calls from customers
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Make telephone calls to customers	
Skills CFA Reference	CS 11	
Level	2	
Credit Value	3	
GLH	16	
Unit Reference No.	K/506/2155	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to make telephone calls to customers	1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls 1.2 Explain the importance of keeping customer information up to date 1.3 Explain the reasons for organisational guidance on dealing with telephone calls 1.4 Explain the reasons for organisational identity checking processes 1.5 Explain how body language and facial expressions can be detected over the telephone 1.6 Describe different questioning techniques when dealing with customers 1.7 Explain organisational guidelines for what can and cannot be said or promised 1.8 Explain how to handle abusive calls from customers	
2. Be able to plan telephone calls to customers	2.1 Identify the objective(s) of calls 2.2 Prepare the information needed to make calls 2.3 Plan the structure of calls 2.4 Identify customers' likely responses and how they can be dealt with	

<p>3. Be able to make telephone calls to customers</p>	<p>3.1 Use telecommunications equipment in accordance with organisational standards</p> <p>3.2 Confirm the identity of customers in line with organisational guidelines</p> <p>3.3 Make the customer aware of the purpose of the call as early as possible</p> <p>3.4 Speak clearly, concisely and politely, using speech and tone to create rapport</p> <p>3.5 Adapt their own communication style to meet customers' needs</p> <p>3.6 Listen actively to what customers are saying to collect as much information as possible</p> <p>3.7 Give clear and concise information that meets customers' needs</p> <p>3.8 Record information in line with organisational guidelines</p> <p>3.9 Complete agreed follow up actions after closing the telephone call</p>
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Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSA12 Make telephone calls to customers
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Promote additional products and/or services to customers	
Skills CFA Reference	CS 12	
Level	2	
Credit Value	2	
GLH	14	
Unit Reference No.	L/506/2133	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services 1.2 Explain the importance of keeping product/service knowledge up to date 1.3 Explain how to match products and/or services to customer needs 1.4 Describe techniques to promote additional products and/or services	
2. Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience 2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers 2.3 Provide information to customers that will help them to decide whether to select additional products and/or services 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSA5 Promote additional services or products to customers
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Process information about customers	
Skills CFA Reference	CS 13	
Level	2	
Credit Value	3	
GLH	14	
Unit Reference No.	R/506/2134	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to process customer information	1.1 Describe the functions of customer information systems 1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information 1.3 Explain different responsibilities and levels of authority for processing customer service information 1.4 Explain the reliability of sources of customer information 1.5 Explain the validity of customer information	
2. Be able to process customer information	2.1 Record information about customers in line with organisational standards and procedures 2.2 Keep customer information up to date 2.3 Respond to requests for customer information from authorised people in a timely manner 2.4 Retrieve customer information that meets the requirements of the request 2.5 Supply customer information in a format appropriate for the recipient 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSA6 Process information about customers

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Exceed customer expectations	
Skills CFA Reference	CS 14	
Level	2	
Credit Value	3	
GLH	15	
Unit Reference No.	Y/506/2135	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive 1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3 Explain the types of actions that customers are likely to perceive as adding value 1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer	
2. Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer 2.2 Explain the service offer clearly and concisely to customers 2.3 Identify options that offer added value without affecting other customers adversely 2.4 Make offers to customers within their own authority levels 2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer 2.6 Record agreements made and actions taken	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSA9 Go the extra mile in customer service

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Deliver customer service whilst working on customers' premises	
Skills CFA Reference	CS 15	
Level	2	
Credit Value	4	
GLH	20	
Unit Reference No.	T/506/2143	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit 1.2 Explain the importance of being positive about the product and/or service 1.3 Explain organisational standards of presentation, behaviour and communication 1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed 1.5 Explain how to identify possible risks relating to the work to be carried out 1.6 Explain the way in which legislation affects the work to be carried out	
2. Be able to deliver customer service whilst working on customers' premises	2.1 Identify themselves to customers 2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises 2.3 Confirm with customers the nature of work to be carried out on their premises 2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed 2.5 Treat customers, their premises and property with consideration 2.6 Confirm that the customer is satisfied with the outcome 2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises	
Additional Information about the unit		
Unit expiry date	August 31 2014	
Details of the relationship between the unit	Customers Service (2013) National	

and relevant national occupational standards or other professional standards or curricula (if appropriate)	Occupational Standards: <ul style="list-style-type: none"> CFACSB3 Deliver customer service on your customer's premises
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Carry out customer service handovers	
Skills CFA Reference	CS 16	
Level	2	
Credit Value	3	
GLH	15	
Unit Reference No.	T/506/2157	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the customer service handover process	1.1 Explain an organisation's customer service handover procedures 1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues 1.3 Explain why, when and how to set reminders to follow up on actions handed over to others 1.4 Explain levels of their own responsibility in the customer service handover process	
2. Be able to plan customer service handovers	2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members 2.2 Agree with colleagues when to pass customer service issues from one person to another 2.3 Agree methods of information exchange	
3. Be able to carry out customer service handovers	3.1 Explain to customers to whom and why a handover is being made 3.2 Exchange information with colleagues in line with organisational procedures 3.3 Check that actions required by others following handovers have been completed 3.4 Identify further actions when the activities required by others have not been completed 3.5 Share feedback with colleagues to make improvements to handover processes	

Additional Information about the unit

Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSB8 Maintain customer service through effective handover • CFACSB16 Deliver seamless customer service with a team
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Resolve customer service problems	
Skills CFA Reference	CS 17	
Level	2	
Credit Value	5	
GLH	22	
Unit Reference No.	A/506/2158	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the resolution of customer service problems	1.1 Describe the organisation's customer service and complaints procedures 1.2 Describe techniques to identify customer service problems and their causes 1.3 Describe techniques to deal with situations where customers become agitated or angry 1.4 Explain the limits of their own authority for resolving customers' problems and making promises 1.5 Explain the purpose of encouraging customers to provide feedback 1.6 Describe methods used to encourage customers to provide feedback	
2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems 2.2 Identify workable options for resolving problems within organisational guidelines 2.3 Use the most appropriate method of communication for dealing with customers 2.4 Agree with customers the option that best meets their needs and those of the organisation 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process 2.7 Share customer feedback with others to improve the resolution of customer service problems 2.8 Adhere to organisational policies and procedures, legal and ethical	

	requirements when resolving customer service problems
3. Be able to manage unresolved customer service problems	<p>3.1 Explain to customers the reasons why problems cannot be resolved</p> <p>3.2 Refer customers to other sources of help if their problems cannot be resolved</p>

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSC3 Resolve customer service problems
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Deliver customer service to challenging customers	
Skills CFA Reference	CS 18	
Level	2	
Credit Value	3	
GLH	16	
Unit Reference No.	F/506/2159	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment 1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers 1.3 Explain behaviours that make it challenging to deal with customers 1.4 Explain the difference between assertive and aggressive behaviour 1.5 Describe techniques to deal with customers' challenging behaviour 1.6 Explain their own levels of authority for agreeing actions outside the service offer 1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters	
2. Be able to deal with challenging customers	2.1 Identify the signs that indicate that a customer is challenging 2.2 Express understanding of customers' point of view without admitting liability 2.3 Explain to customers the limits of the service they can offer 2.4 Explain to customers the reasons for an organisation's position and policy 2.5 Agree a way forward that balances customer satisfaction and organisational needs 2.6 Obtain help from colleagues when options for action are beyond their level of authority 2.7 Adhere to organisational policies and	

	procedures, legal and ethical requirements when dealing with challenging customers
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Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSC4 Deliver customer service to challenging customers
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Develop customer relationships	
Skills CFA Reference	CS 19	
Level	2	
Credit Value	3	
GLH	18	
Unit Reference No.	Y/506/2149	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers 1.2 Explain the value of customer loyalty and retention 1.3 Explain how customers' expectations may change over time 1.4 Explain the use of customer feedback as a means of developing customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers 1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships	
2. Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback 2.3 Share feedback from customers with others 2.4 Identify added value that the organisation could offer customers 2.5 Bring to customers' attention products or services that may interest them	

Additional Information about the unit	
Unit expiry date	August 31 2014

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSD1 Develop customer relationships
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Support customer service improvements	
Skills CFA Reference	CS 20	
Level	2	
Credit Value	3	
GLH	12	
Unit Reference No.	T/506/2160	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to support customer service improvements	1.1 Describe different sources of information that may help identify ways of improving customer service 1.2 Describe the constraints on suggesting improvements to customer service 1.3 Explain the limits of their own authority in implementing improvements	
2. Be able to identify the potential for improvements to customer service	2.1 Use information from a range of sources to understand the customer experience 2.2 Identify potential areas where customer service could be improved from an analysis of information 2.3 Make recommendations for improvement that are based on evidence from analysed information	
3. Be able to support the implementation of improvements to customer service	3.1 Implement agreed improvements within the limits of their own authority 3.2 Inform customers of improvements to customer service 3.3 Identify the impact of improvements to customer service and feedback to relevant people	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSD2 Support customer service improvements
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA

Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Support customers through real-time online customer service	
Skills CFA Reference	CS 21	
Level	2	
Credit Value	3	
GLH	15	
Unit Reference No.	A/506/2161	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to support customers through real-time online customer service	1.1 Explain how an organisation's online customer service system works 1.2 Explain how to navigate their own customer service site 1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services 1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems	
2. Be able to establish the customer service support needed by customers	2.1 Identify customers' familiarity with the site 2.2 Identify the difficulties faced by customers when navigating websites 2.3 Identify the support for customers that will meet their needs	
3. Be able to support online customer service in real-time	3.1 Step through screen sequences while the customer operates the system 3.2 Communicate with customers in terms they can understand 3.3 Inform customers of what is happening and why certain steps are required 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSD4 Support customers using on-line customer services

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Support customers using self-service equipment	
Skills CFA Reference	CS 22	
Level	2	
Credit Value	3	
GLH	18	
Unit Reference No.	H/506/2977	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to support customers using self-service equipment	1.1 Explain how the self-service equipment works 1.2 Describe problems that are commonly encountered by customers when using self-service equipment 1.3 Explain demonstration techniques to use when supporting customers using self-service equipment 1.4 Explain organisational procedures for the use of equipment and fault reporting	
2. Be able to identify the help needed by customers using self-service equipment	2.1 Identify signs that show when a customer is having difficulty with the self-service equipment 2.2 Identify a style and level of intervention that meets customers' needs	
3. Be able to help customers to use self-service equipment	3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment 3.2 Use staff override functions to enable self-service equipment to be used by customers 3.3 Explain to customers how to use the equipment and complete the transaction 3.4 Report equipment-related errors and issues to the right person	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSD7 Support customers using self-service technology

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Use social media to deliver customer service	
Skills CFA Reference	CS 23	
Level	2	
Credit Value	3	
GLH	18	
Unit Reference No.	J/506/2163	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand social media in a business environment	1.1 Explain how different social media platforms can be used for customer service 1.2 Describe different audience groups for a range of social media platforms 1.3 Explain the importance of monitoring customer posts in social media networks 1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes 1.5 Explain the etiquette of communication within different social media platforms 1.6 Explain the importance of security settings and how they are used on different social media platforms 1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media	
2. Be able to deal with customers using social media	2.1 Monitor social media to identify customer questions, requests and comments 2.2 Make responses that are appropriate to posts made by customers on social media networks 2.3 Take action to ensure that customers are satisfied before closing dialogue 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media	

Additional Information about the unit	
Unit expiry date	August 31 2014

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSA19 Deal with customers using a social media platform
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

DRAFT

Title	Provide post-transaction customer service	
Skills CFA Reference	CS 24	
Level	2	
Credit Value	5	
GLH	22	
Unit Reference No.	K/506/2978	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand post-transaction customer service	1.1 Explain organisational policies and procedures for post-transaction customer service 1.2 Explain the purposes and range of post-transaction activities 1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service 1.4 Explain how legislation and regulation affect customers' rights 1.5 Explain the advantages and disadvantages of post-transaction customer service programmes	
2. Be able to provide post-transaction customer service	2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines 2.2 Use unplanned opportunities post-transaction to provide customer service 2.3 Identify reasons for contacting customers post-transaction 2.4 Confirm customers' levels of satisfaction post-transaction 2.5 Make recommendations to decision makers to enhance customer satisfaction 2.6 Present a professional and helpful image	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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