

Cambridge **TECHNICALS LEVEL 2**

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CUSTOMER SERVICE

Unit CS7

**Handling challenging customer
service situations**

Model assignment

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Guided learning hours: 60

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Please note:

You can use this assignment to provide evidence for summative assessment, which is when the learner has completed their learning for this unit and is ready to be assessed against the grading criteria.

You can use this assignment as it is, or you can modify it or write your own; we give more information in this document under Guidance for tutors.

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Guidance for tutors on using this assignment

General

OCR Cambridge Technical model assignments are available to download from our website: www.ocr.org.uk.

The purpose of this assignment is to provide a scenario and model of tasks that are typical of how customer service representatives would handle challenging customer service situations to enable you to assess your learner against the requirements specified in the grading criteria. The scenario and its tasks are intended to give a work-relevant reason for applying the skills, knowledge and understanding needed to achieve the unit.

This assignment will not instruct learners how to meet the highest grade. Whether learners achieve a pass, merit or distinction will depend on what evidence they produce.

You can modify the scenario we provide in this assignment to make it more relevant to your local or regional needs. Please refer to the information under 'Modifying the model assignment' later in this section.

You do not have to use this assignment. You can use it as a guide to help you to design your own assignment, and we provide an assignment checking service. You'll find more information on these matters in Section 8 of the qualification handbook.

In the tasks, we'll refer to the format of evidence. Learners are **not** required to follow that format **unless** we tell them otherwise.

It's essential that the work every learner produces is their own. Please make sure you read through the information we give on authenticity in Section 8 of the qualification handbook and make sure that your learners and any staff involved in assessment understand how important authenticity is.

We provide this assignment to be used for summative assessment. You must not use it for practice or for formative assessment.

Before using this assignment to carry out assessment

Learners will need to take part in a planned learning programme that covers the knowledge, understanding and skills of the unit.

When your learners are ready to be assessed, they must be provided with a copy of the following sections of this assignment:

- General information for learners
- Assignment for learners
- Evidence Checklist

They may carry out preparation prior to undertaking the tasks and there is no time limit for this.

When completing the assignment

You should use this assignment in conjunction with the unit specification and qualification handbook.

- Resource or time requirements – it is important that learners are provided with realistic situations to demonstrate their competence in dealing with challenging customer service situations. This can be through actual work experience or through well designed simulated activities. The personnel acting out the role of the customer(s) or manager should not be other members of the group i.e. peers
- All activities must be carried out on an individual basis. Learners must not work in groups.
- If observations and witness testimonies are being used as evidence, then they must be detailed and individual to the learner concerned. The context of the situation must be given and if confirming that a learner has carried out an activity effectively, what did they do, how did they do it and why was it effective?

Information to support the scenario/tasks

The evidence for this assignment is primarily obtained through role play, so it is important that the learner is provided with a realistic situation with respect to the types of customer, their needs and the situation being challenging.

The learner is Head Receptionist within a hotel and will need to handle a customer who is not happy with the hotel room he/she has been given. The person taking on the role of the customer should show signs of being angry, confrontational, frustrated etc so that the situation is indeed challenging. The learner will be required to provide them with a solution but it is important that the customer shows that they are still not satisfied so that the learner has to present alternative solutions to meet their needs.

Resources to complete the tasks

There are resource requirements for this assignment. Every learner will need access to the following resources:

- For Task 1 – no specific resources as the learner will produce an information guide.
- For Task 2 and 3 – the learner will need to undertake role play where they are the Head Receptionist for a hotel and have a new receptionist working with them. Appropriate person/persons from the centre will need to play the part of the customer and the manager of the hotel. These roles should **not** be undertaken by other learner/learners.
- For Task 4 – no specific resources as the learner will produce a review of their personal performance.

Time

You should plan for learners to have 12-14 hours to complete this assignment.

Learners must be allowed sufficient time to complete all the tasks. The amount of time may vary depending on the nature of the tasks and the ability of individual learners. To help with your planning we have indicated how long each task should take.

Learners can produce evidence in several sessions.

Format of evidence

Learners have to produce evidence that demonstrates how they have met the grading criteria. At the very least they must produce evidence that meets **all** of the pass criteria.

Please make sure your learners realise that missing just one pass criterion means they will not pass the unit, even if they have successfully met the merit and distinction criteria.

We do not have specific requirements for the format of evidence in this assignment. We've said what format the evidence could take for each task. For example, if we say 'You could include a report on ...', the evidence doesn't have to follow any specific reporting conventions. You can modify the format of the evidence, but you must make sure the format doesn't prevent the learner from accessing the grading criteria.

It is possible that certain formats for evidence can naturally cover several grading criteria and avoid the need for excessive amounts of evidence. For example, a report can be a good way to pull together evidence to meet several grading criteria.

For more guidance on generation and collection of evidence, please refer to the section 8 'Internal Assessment', in the qualification handbook.

Group work

This assignment has not been written to include group work. Learners may work in groups during learning activities but not in an assessment task.

If witness statements are used to support learners' evidence, you'll need to complete an individual statement for each learner.

After completing the assignment

Once the learner has submitted their work to you to be assessed, you must judge or 'mark' the work against the grading criteria for the unit and identify one grade for the unit. For further information about assessment, please refer to section 8 of the qualification handbook.

Your assessment decisions must be quality assured across the cohort of learners in your centre who are being entered for the same unit. This must be done through an internal standardisation process. We give information on internal assessment and standardisation in the qualification handbook.

Reworking the assignment

If you and the learner feel they've not performed at their best during the assessment, the learner can, at your discretion, improve their work and resubmit it to you for assessment. If a learner is working on improving their work before it is resubmitted, you and the learner must continue to make sure the work is the learner's own.

Any feedback you give to the learner must not direct them on how to improve their work. You can identify what area of the work could be improved but you cannot give the learner any details about how they could improve it. You must follow the guidelines given in section 8 of the qualification handbook under 'Authenticity of learner work'.

Modifying the model assignment

The tasks in this assignment allow learners access to the full range of grades detailed in the grading criteria of this unit.

If you modify this assignment you must **not** change the grading criteria provided in the tasks for the learner or in the evidence checklist. These grading criteria are taken from the unit.

You can modify the scenario to suit your local or regional needs and the tasks may be contextualised to match any changes you have made to the scenario. If you supply your own materials to support a different scenario, they must be sufficiently detailed for learners to complete the tasks.

You must also make sure that you avoid discrimination, bias and stereotyping and support equality and diversity. For more information, please see the section 'Designing your own assignments for internally assessed units' in section 8 of the qualification handbook.

If modifications are made to the model assignment, whether to the scenario alone, or to both the scenario and individual tasks, it's your responsibility to make sure that all grading criteria can still be met and that learners can access the full range of grades.

If you're using this model assignment and delivering the Certificate or Diploma you have an opportunity to secure meaningful employer involvement by working with an employer to modify it.

General information for learners

Q *What do I need to do to pass this assignment?*

A You need to produce evidence to meet the requirements of **all** the pass criteria for the unit this assignment relates to. If you miss just one pass criterion, you will not achieve this unit and will receive an unclassified result.

Q *What do I need to do if I want to get a merit or distinction for this assignment?*

A For a merit, you need to produce evidence to meet the requirements of **all** the pass criteria for the unit this assignment relates to **and** you need to produce evidence to meet **all** the merit criteria.

For a distinction, in addition to the above, you also need to meet **all** the distinction criteria for this unit.

Q *What help will I get?*

A Your tutor will support you when completing this assignment and will make sure that you know what resources or facilities you need and are allowed to use. We've given your tutor information about how much support they can give you.

Q *What if I don't understand something?*

A It's your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *I've been told I must not plagiarise. What does this mean?*

A Plagiarism is when you take someone else's work and pass this off as your own, or if you fail to acknowledge sources properly. This includes information taken from the internet.

It's not just about presenting a whole copied assignment as your own; you will also be plagiarising if you use the ideas or words of others without acknowledgement, and this is why it's important to reference your work correctly (see Q&A below for more information on referencing).

Plagiarism has serious consequences; you could lose the grade for this unit or you may not be allowed to achieve the whole qualification.

Always remember that the work you produce must be your own work. You will be asked to sign a declaration to say that it is.

Q *What is referencing and where can I find out more information about it?*

A Referencing is the process of acknowledging the work of others. If you use someone else's words and ideas in your assignment, you must acknowledge it, and this is done through referencing.

You should think about why you want to use and reference other people's work. If you need to show your own knowledge or understanding about an aspect of subject content in your assignment, then just quoting and referencing someone else's work will not show that **you** know or understand it. Make sure it's clear in your work how you are using the material you have referenced **to inform** your thoughts, ideas or conclusions.

You can find more information about how to reference in the [The OCR Guide to Referencing](http://www.ocr.org.uk/i-want-to/skills-guides/) available on our website: <http://www.ocr.org.uk/i-want-to/skills-guides/>.

Q ***Can I work in a group?***

A No. You may work in groups during learning activities but not for final assessment tasks. Your tutor can advise you about this.

Q ***Does my work for each task need to be in a particular format?***

A You can present your work in a variety of ways – it can be handwritten, word-processed, on video or in digital media. What you choose should be appropriate to the task(s) and your tutor can advise you about this. There may be times when you need proof that you have completed the work yourself: for example, if you do something during work placement that you want to use as evidence, your tutor might ask the employer to provide a witness statement.

Make sure you check the wording in each task carefully. For each task, we'll tell you if your evidence has to be in a specific format:

- If we use the word '**must**', for example 'You must produce a report' or 'Your evidence/work must include a diagram', then you must produce the work in the stated format.
- If we use the word '**could**', for example 'You could include sketches of your ideas' or 'You could do this by annotating your diagram', this means that you are not required to follow the format we have given, but you must make sure that the work you do produce allows you to demonstrate the requirements of the grading criteria.

If you are unsure about what evidence you need, please ask your tutor.

Q ***Can I ask my tutor for feedback on my work?***

A Yes, but they can't give you detailed feedback.

We have given your tutor instructions on what kind of feedback they can give you. For example, they are **not** allowed to tell you exactly what to do to make your work better, but they **can** remind you about what they've taught you and you can use this additional learning to try and improve your work independently. They can say what they've noticed might be wrong with your work, for example if your work is descriptive where an evaluation is required, but your tutor can't tell you specifically what you need to do to change it from a description to an evaluation – you will need to work out what you need to do and then do it for yourself.

Q ***When I have finished, what do I need to do?***

A If you have included the personal details (such as name, address or date of birth) of someone other than yourself in your work, this must be blanked out (anonymised) – your tutor will tell you how to do this. You don't need to do this for information contained in references.

You can complete the evidence checklist to show your tutor where they can find the evidence for each grading criterion in your work.

You should make sure your work is labelled, titled and in the correct order for assessing.

Hand in the work that you've completed for each task to your tutor. They might ask to see your draft work, so please keep your draft work in a safe place.

Q ***How will my work be assessed?***

A Your work will be marked by someone in your centre who has been authorised to do so. They will use the information in the grading criteria to decide which grade your work meets. The grading criteria are detailed in each unit and are also given in the tasks within this assignment. Please ask your tutor if you are unsure what the grading criteria are for this assignment.

Assignment for learners

Unit 7: Handling Challenging Customer Service Situations

Scenario

Part A – Assessing a situation

You work for the Progress Hotel chain as the Head Receptionist for Progress Hotel, Coventry. Your role is to deliver effective customer service daily to the many customers that visit the hotel. The hotel also provides facilities for meetings, conferences, parties and has a beauty and spa facility. The hotel has recently employed two new receptionists and your line manager has asked you to provide a guide on how to assess the causes of challenging customer service situations.

Part B – Gathering information and suggesting appropriate actions

Whilst working on reception at the Progress Hotel, Coventry, one of the new receptionists is presented with a challenging customer service situation. The customer is not happy with the room that they have been allocated during their stay and they are becoming angry and confrontational. You decide to take over from the new receptionist as you have more experience of dealing with these types of situations and do not want the situation to get out of hand.

You quietly ask the new receptionist to watch how you deal with the customer so that they can learn from the experience. You will be observed selecting and using appropriate communication methods to gather information from the customer so that you can establish their needs. You will then explain to the new receptionist what you have established as the needs of the customer and suggest possible actions that can be taken to address those needs. You will need to make it clear to the receptionist whether any of the suggestions can be carried out without seeking permission from your line manager. You decide that it would be appropriate to inform the manager anyway, so you will discuss the situation with your manager and the actions which need to be taken, recommending and justifying the best outcome for the customer and Progress Hotel.

The tasks

Task 1: Assessing the causes of challenging customer service situations

(This task should take between 1 and 2 hours.)

Learning Outcome 1: **Be able to assess the causes of challenging customer service situations** is assessed in this task.

Your task is to:

Produce a guide for new receptionists about the causes of challenging customer service situations. The manager has asked you to include information relating to the influencing factors, possible indicators and typical issues that can create challenging customer service situations.

Pass	Merit	Distinction
P1: Assess the causes of challenging customer service situations		
Evidence		
Information Guide <p>This is to be given to new receptionists and provide them with a guide on the causes of challenging customer service situations. The guide should include information on the factors that can influence customer service situations, possible indicators that they can pick up from observing their customers' reactions and typical issues that can arise which can create a challenging situation.</p>		

Task 2: Gathering information and suggesting appropriate actions

(This task should take between 2 and 3 hours.)

Learning Outcome 2: **Be able to gather information to address the needs of customers in challenging customer service situations** is assessed in this task.

Part of Learning Outcome 3: **Be able to communicate actions to the customer to address their needs in challenging customer service situations** is assessed in this task.

Your task is to:

Select and use the appropriate communication methods to gather further information from the angry customer to establish their needs. Once you have established their needs, you will explain to the new receptionist what the needs of the customer are and the potential actions that could be taken to address these needs. You will also discuss the situation with your manager and the action that should be taken in order to pacify the customer and meet their needs.

Following this activity, you could also make recommendations to an appropriate person as to how the customer's needs should be met, justifying these recommendations.

Pass	Merit	Distinction
P2: Select and use appropriate communication methods and techniques to gather further information of the need(s) of a specific customer in a challenging situation		
P3: Explain the need(s) of a specific customer in a challenging situation to an appropriate person	M1: Make recommendations to an appropriate person regarding the action(s) to be taken to address the need(s) of a customer in a challenging situation and justify reasons for this	
P4: Identify possible actions to address the needs of a customer in a specific challenging situation		

Evidence

Assessor observation report or video (P2)

Your evidence must take the form of, either:

- an assessor observation
- Or
- a video

of you speaking to/communicating with the customer.

Assessor observation report or video (P3, P4, M1)

You will need to explain to the new receptionist what the customer needs are and identify the actions that could be taken to meet these needs. You must either be observed by your assessor, who will complete a witness statement, or be filmed talking to the new receptionist. Make sure that your explanations are clear and that your suggestions are feasible.

If you make recommendations to your manager about the appropriate actions to be taken to address this situation (M1), these recommendations should be presented in a more formal document.

Task 3: Communicating actions to the customer

(This task should take between 5 and 6 hours.)

Learning Outcome 3: **Be able to communicate actions to the customer to address their needs in challenging customer service situations** is assessed in this task.

Your task is to:

- inform the customer about the recommended actions that can be taken to address their needs.
- explain to the customer the organisational policy and position on dealing with this situation where their needs have not been met.
You **could** agree with your manager alternative solutions, recommending these to the customer.
You **could** also justify how the chosen outcome balances organisational needs and customer satisfaction.
- once you have reached an outcome with the customer which is acceptable to them, complete appropriate actions to address customer needs.
You **could** then follow-up with the relevant person/department to ensure further actions have been completed to resolve the issue for the customer and check the customer's satisfaction with the resolution.

Pass	Merit	Distinction
P5: Use appropriate language and terminology to communicate recommended actions to be taken to the customer	M2: Use appropriate techniques to confirm the customer's understanding of the actions to be taken	
P6: Explain to a specific customer the organisational policy and position on addressing their need(s) when customer expectations are not met	M3: Recommend alternative solutions whilst balancing customer satisfaction and organisational needs	D1: Justify how the chosen outcome balances organisational needs and customer satisfaction
P7: Complete appropriate actions to address customer needs		D2: Follow-up with relevant person/department that actions have been taken to ensure a resolution for the customer, checking customer satisfaction with that resolution

Evidence

Assessor observation report or video (P5, M2)

Your evidence must take the form of, either:

- an assessor observation
Or
- a video

of you using appropriate language and terminology to communicate the recommended actions to the customer.

You could also (M2) use appropriate techniques to confirm the customer's understanding of the

actions to be taken.

Assessor observation report or video (P6, P7, M3, D1, D2)

Your evidence must take the form of, either:

- an assessor observation
- Or
- a video

of you explaining the organisational policy and position when customer expectations are not met.

You could also recommend alternative solutions (M3) which balance organisational needs and customer satisfaction and (D2) justify how the chosen solutions do that.

You should also complete the appropriate actions within your remit to address their needs.

You could also (D2) follow-up with a relevant person/department to ensure a resolution for the customer was achieved, checking that the customer was satisfied with the outcome.

Task 4: How did it go?

(This task should take between 2 and 3 hours.)

Learning Outcome 4: **Be able to review approach to handling customers in challenging customer service situations.**

Your task is to:

Review your own performance when handling the customer in the challenging customer service situation. You will consider your personal strengths and weaknesses and identify what in particular you found challenging and recommend what you could do to improve how you would deal with customers in challenging situations.

You **could** then produce a schedule of learning activities for dealing with customers in challenging situations in the future.

Pass	Merit	Distinction
P8: Review own performance when handling a customer in a challenging situation	M4: Produce a schedule for learning activities to improve the handling of customers in challenging situations	
P9: Identify areas for improvement when handling a customer in a challenging situation		
Evidence		
Report (P8, P9) You should produce a report where you reflect on your performance when dealing with the customer in the challenging situation. Show that you have considered your strengths and weaknesses, as well as anything that you found particularly challenging. You should also identify areas for improvement in how you handle customers in future challenging situations.		
Learning activity schedule (M4) You could produce a schedule of learning activities for new receptionists to improve the handling of customers in challenging situations in the future. This schedule should be accessible and relevant to others in similar situations in the future, whether electronic or hard copy format.		

Evidence Checklist

OCR Level 2 Cambridge Technical Diploma in Customer Service

Unit 7: Handling Challenging Customer Service Situations

LEARNER NAME:

For PASS have you: (as a minimum you have to show you can meet every pass criterion to complete the unit)	Where can your tutor find the evidence? Give page no(s)/digital timings, etc.
Assessed the causes of challenging customer service situations? (P1)	
Selected and used appropriate communication methods and techniques to gather further information of the need(s) of a specific customer in a challenging situation? (P2)	
Explained the need(s) of a specific customer in a challenging situation to an appropriate person? (P3)	
Identified possible actions to address the needs of a customer in a specific challenging situation? (P4)	
Used appropriate language and terminology to communicate recommended actions to be taken to the customer? (P5)	
Explained to a specific customer the organisational policy and position on addressing their need(s) when customer expectations are not met? (P6)	
Completed appropriate actions to address customer needs? (P7)	
Reviewed own performance when handling a customer in a challenging situation (P8)	
Identified areas for improvement when handling a customer in a challenging situation? (P9)	

For Merit have you:	Where can your tutor find the evidence? Give page no(s)/digital timings, etc.
Made recommendations to an appropriate person regarding the action(s) to be taken to address the needs(s) of a customer in a challenging situation and justify reasons for this? (M1)	
Used appropriate techniques to confirm the customer's understanding of the actions to be taken? (M2)	
Recommended alternative solutions whilst balancing customer satisfaction and organisational needs? (M3)	
Produced a schedule for learning activities to improve the handling of customers in challenging situations? (M4)	

For Distinction have you:	Where can your tutor find the evidence? Give page no(s)/digital timings, etc.
Justified how the chosen outcome balances organisational needs and customer satisfaction? (D1)	
Followed up with relevant person/department that actions have been taken to ensure a resolution for the customer, checking customer satisfaction with that resolution? (D2)	

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OCR customer contact centre

Vocational qualifications

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