

Cambridge **TECHNICALS LEVEL 2**

Cambridge  
**TECHNICALS**  
**2016**

# ***CUSTOMER SERVICE***

## **Unit 1**

### **Principles of working in service sector organisations**

**R/615/5441**

**Guided learning hours: 60**

**Version 1 September 2018**

## LEVEL 2

### UNIT 1: Principles of working in service sector organisations

R/615/5441

**Guided learning hours:** 60

**Essential resources required for this unit:** None

**This unit is externally assessed by an OCR set and marked examination.**

#### UNIT AIM

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This unit will introduce you to information and knowledge that you will find useful when you start work as a new employee in a service sector organisation. You will learn about:

- common responsibilities in the Retail, Customer Service and Business Administration sectors
- forms of business ownership and different types of organisational structure in the service sector
- legislation that will affect you from your first day in the workplace
- forms of communication to use in different situations
- business policies that you will have to follow
- documents that you might be asked to use in your day-to-day role

The focus is on you, your influence on the business and helping you to fit into your new workplace as quickly as possible.

You will develop essential underpinning knowledge and understanding through this unit and Unit 2 Understand customer expectations and issues.

We strongly recommend that you complete Units 1 and 2 before undertaking assessment in other units because these areas of learning will underpin the whole qualification.

## TEACHING CONTENT

The unit content describes what has to be taught to ensure that learners are able to access the highest grade.

Anything which follows an i.e. details what must be taught as part of that area of content.

Anything which follows an e.g. is illustrative.

Where teaching content contains i.e. and e.g. under specific areas of content, the following rules will be adhered to when we set questions for an exam:

- A direct question may be asked about teaching content which follows an i.e.
- Where unit content is shown as an e.g. a direct question will not be asked about that example.

	Learning Outcome The Learner will:		Teaching Content The Learner must be taught:		Teaching exemplification
1	Know about working in a service organisation	1.1	Common responsibilities in retail, customer service and business administration sectors i.e. <ol style="list-style-type: none"> <li>1. Direct customer service i.e.               <ol style="list-style-type: none"> <li>a. answering questions efficiently and effectively</li> <li>b. dealing with complaints promptly</li> <li>c. keeping up-to-date with new products, services and processes</li> <li>d. providing an experience that meets customer expectations</li> <li>e. providing excellent customer service to internal and external customers</li> </ol> </li> <li>2. Indirect customer service i.e.               <ol style="list-style-type: none"> <li>a. creating a good first impression for all customers e.g. being approachable, friendly and well-groomed</li> <li>b. ensuring that the workplace/environment is clean and tidy</li> <li>c. ensuring that the workplace/environment is suitably designed and organised</li> </ol> </li> <li>3. Ensuring health and safety of customers i.e.</li> </ol>	1.1	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>a. following the organisation's health and safety policy to ensure the health and safety of internal and external customers</li> <li>b. reporting any issues identified and/or taking appropriate action i.e. <ul style="list-style-type: none"> <li>i. using signage to alert customers to hazards</li> <li>ii. addressing the cause of the issue if within own limits of responsibility</li> <li>iii. alerting the person/team responsible for health and safety where necessary</li> <li>iv. undertaking health and safety training as required by the organisation</li> </ul> </li> <li>4. Arranging equipment/displays i.e. <ul style="list-style-type: none"> <li>a. arranging displays to aid customers (e.g. similar products arranged together in a store)</li> <li>b. ensuring products are in a saleable condition</li> <li>c. arranging equipment with consideration of ergonomics</li> <li>d. ensuring that equipment is always returned to the correct place</li> <li>e. making best use of space (e.g. not storing reams of paper a distance away from the photocopier)</li> </ul> </li> <li>5. Arranging internal/external meetings i.e. <ul style="list-style-type: none"> <li>a. arranging and confirming an appropriate venue</li> <li>b. arranging and confirming date and time</li> <li>c. different meeting types and their features i.e. <ul style="list-style-type: none"> <li>i. telephone conference features i.e. <ul style="list-style-type: none"> <li>▪ more than 2 participants</li> <li>▪ useful for remote meetings</li> <li>▪ cannot share documents easily</li> <li>▪ cannot see other participants</li> </ul> </li> </ul> </li> </ul> </li> </ul>	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>ii. video conference features i.e.                             <ul style="list-style-type: none"> <li>▪ useful for remote meetings</li> <li>▪ can share documents</li> <li>▪ can see other participants</li> <li>▪ requires adequate technology</li> </ul> </li> <li>iii. web conference features i.e.                             <ul style="list-style-type: none"> <li>▪ useful for remote meetings</li> <li>▪ can share documents</li> <li>▪ can see other participants or not, as desired</li> <li>▪ requires adequate technology</li> <li>▪ can view/edit documents on screen</li> <li>▪ can record meetings</li> </ul> </li> <li>iv. face-to-face i.e.                             <ul style="list-style-type: none"> <li>▪ all attendees together in one place</li> <li>▪ no risk of technological issues (with meeting software/hardware)</li> <li>▪ able to react to body language and facial expressions</li> <li>▪ able to share documents easily</li> <li>▪ potentially requires long distance travel</li> </ul> </li> <li>d. use of electronic diary systems</li> <li>6. Answering phones i.e.                             <ul style="list-style-type: none"> <li>a. addressing the caller appropriately</li> <li>b. asking before putting a caller on hold</li> <li>c. do not use slang or inappropriate language</li> <li>d. ensure that the message is fully understood</li> <li>e. identify yourself clearly</li> <li>f. use active listening techniques</li> <li>g. use clear speech</li> </ul> </li> </ul>	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>7. Mail services i.e.               <ul style="list-style-type: none"> <li>a. arranging delivery</li> <li>b. processing mail/returns</li> </ul> </li> <li>8. Dealing with problems i.e.               <ul style="list-style-type: none"> <li>a. broken equipment or displays i.e.                   <ul style="list-style-type: none"> <li>i. reporting to IT department (if appropriate)</li> <li>ii. identifying impact on own role</li> <li>iii. finding out how long a repair will take</li> <li>iv. identifying alternative equipment/way of working</li> </ul> </li> <li>b. complaints i.e.                   <ul style="list-style-type: none"> <li>i. record complaints accurately</li> <li>ii. record customer details accurately</li> <li>iii. ensure response in line with organisational guidelines</li> <li>iv. refer to manager if outside own authority to respond</li> </ul> </li> <li>c. conflict with a colleague i.e.                   <ul style="list-style-type: none"> <li>i. talk with the colleague to find a way to resolve any conflict</li> <li>ii. discuss the issues with your line manager</li> <li>iii. follow a grievance procedure if required</li> </ul> </li> <li>d. increased workload i.e.                   <ul style="list-style-type: none"> <li>i. prioritise effectively</li> <li>ii. discuss with line manager if the workload is too much</li> <li>iii. ask for help from team members</li> </ul> </li> <li>e. payments i.e.                   <ul style="list-style-type: none"> <li>i. technological issues may mean cash/cheques must be used</li> </ul> </li> </ul> </li> </ul>	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>ii. escalate problems to the relevant person/department</li> <li>iii. request alternative methods of payment (e.g. when a card is declined)</li> </ul>	
	1.2	<p>Know about organisational structures i.e.</p> <ul style="list-style-type: none"> <li>1. Different types of structure i.e. <ul style="list-style-type: none"> <li>a. Flat hierarchical</li> <li>b. Tall hierarchical</li> <li>c. Matrix</li> <li>d. Functional</li> </ul> </li> <li>2. Knowledge of the terms used for sizes of organisations i.e. <ul style="list-style-type: none"> <li>a. Micro (up to nine staff)</li> <li>b. SME (Small to Medium-sized Enterprises – small: 10-49 staff, medium: 50-249 staff)</li> <li>c. Large (more than 250 staff)</li> </ul> </li> <li>3. Knowledge of different types of business ownership and the sectors to which they belong, i.e. <ul style="list-style-type: none"> <li>a. Private i.e. <ul style="list-style-type: none"> <li>i. Sole trader</li> <li>ii. Partnership</li> <li>iii. Private limited company (Ltd)</li> <li>iv. Public limited company (plc)</li> <li>v. Cooperative</li> </ul> </li> <li>b. Public i.e. <ul style="list-style-type: none"> <li>i. government owned</li> <li>ii. local authority owned</li> </ul> </li> <li>c. Not for profit i.e. <ul style="list-style-type: none"> <li>i. Charity</li> </ul> </li> </ul> </li> </ul>	1.2

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		ii. Community enterprise	
	1.3	<p>Teamwork in the workplace i.e.</p> <ol style="list-style-type: none"> <li>1. Reasons why you will be asked to work as part of a team i.e.               <ol style="list-style-type: none"> <li>a. to increase productivity and get the job done more quickly</li> <li>b. to give better customer service</li> <li>c. to share experience and advice</li> <li>d. to provide support to and receive support from colleagues</li> </ol> </li> <li>2. Methods used by team members to share experience and advice i.e.               <ol style="list-style-type: none"> <li>a. advice via email/text exchange</li> <li>b. formal on-the-job training</li> <li>c. informal on-the-job advice</li> <li>d. peers supporting each other</li> <li>e. supervisors supporting employees</li> <li>f. team meetings</li> </ol> </li> </ol>	1.3 To include consideration of all three vocational areas; the appropriate methods for sharing experience and advice in each instance and why it may be beneficial to work as part of a team.
	1.4	<p>Who to report to in the workplace i.e.</p> <ol style="list-style-type: none"> <li>1. The chain of command within a business i.e.               <ol style="list-style-type: none"> <li>a. levels of employee status i.e.                   <ol style="list-style-type: none"> <li>i. CEO</li> <li>ii. Directors</li> <li>iii. Managers</li> <li>iv. Supervisors</li> <li>v. Operatives</li> <li>vi. Apprentices</li> </ol> </li> </ol> </li> <li>2. Knowing when to refer tasks to a line manager i.e.               <ol style="list-style-type: none"> <li>a. escalating a complaint or a query</li> <li>b. to sign letters</li> </ol> </li> </ol>	1.4 To include knowledge that the number of levels of employee status will vary according to the size of the business.  Learners must know that when required, they should refer to their line manager in the first instance rather than (for example) the most senior person in the business.

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<p>c. to authorise payments</p> <p>1.5 Use of technology in the workplace i.e.</p> <ol style="list-style-type: none"> <li>1. Hand-held payment and ordering systems i.e.               <ol style="list-style-type: none"> <li>a. payments possible away from till point</li> <li>b. protocols for using these to take payments (e.g. not observing PIN entry, not taking card away from customer)</li> </ol> </li> <li>2. Online chat i.e.               <ol style="list-style-type: none"> <li>a. connects customers with a 'real' person</li> <li>b. customers can receive specific advice re: complaints or other issues/queries (rather than browsing an FAQ section)</li> </ol> </li> <li>3. Social media i.e.               <ol style="list-style-type: none"> <li>a. advertising and promotion</li> <li>b. connecting with customers and potential customers</li> <li>c. reviews can be responded to (positive or negative)</li> </ol> </li> <li>4. Tablets i.e.               <ol style="list-style-type: none"> <li>a. access information quickly and in any location</li> <li>b. check stock levels</li> <li>c. keep a diary</li> <li>d. make notes</li> <li>e. make or monitor bookings/orders</li> <li>f. send/receive emails with documents attached</li> <li>g. show/present information to customers</li> </ol> </li> <li>5. Teleconferencing i.e.               <ol style="list-style-type: none"> <li>a. telephone discussions can be held between a number of different people in different locations</li> </ol> </li> <li>6. Video-conferencing i.e.               <ol style="list-style-type: none"> <li>a. enables face-to-face meetings to take place between people in different locations</li> </ol> </li> </ol>	1.5

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		7. Wi-Fi i.e. <ul style="list-style-type: none"> <li>a. provides the ability to connect devices to the Internet</li> <li>b. allows you to work online away from your desk</li> </ul>	
		1.6 Know about customer types and characteristics i.e. <ul style="list-style-type: none"> <li>1. Different types of customers/consumers i.e.               <ul style="list-style-type: none"> <li>a. Difference between a customer and a consumer</li> <li>b. Internal customers</li> <li>c. External customers/consumers</li> <li>d. Business to business (B2B)</li> </ul> </li> <li>2. Customer characteristics               <ul style="list-style-type: none"> <li>a. Age</li> <li>b. Cultural, ethical, religious differences</li> <li>c. Gender</li> <li>d. Income</li> <li>e. Social class</li> <li>f. Tastes and preferences</li> </ul> </li> </ul>	1.6
2	Know how workplace legislation affects employees in service sector organisations	2.1 <ul style="list-style-type: none"> <li>1. Health and safety i.e.               <ul style="list-style-type: none"> <li>a. definition of risk and hazard</li> <li>b. the requirement to have a safe physical workplace environment</li> <li>c. risk assessments i.e.                   <ul style="list-style-type: none"> <li>i. what they are</li> <li>ii. why they are carried out</li> </ul> </li> </ul> </li> <li>2. Requirements of Health and Safety (Display Screen Equipment) regulations i.e.               <ul style="list-style-type: none"> <li>a. right to breaks</li> <li>b. right to eye tests</li> <li>c. screens should be at the correct brightness</li> <li>d. screens should be at the correct distance</li> </ul> </li> </ul>	2.1  Only the aspects of legislation specifically mentioned here will be assessed. The acts of legislation these are drawn from should be those specified or their equivalent, should it be revised during the lifetime of this qualification or if it differs, for example, in Northern Ireland.  To include a basic overview of risk assessments.

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>e. workstations should be at the correct height</li> <li>f. workstations should have sufficient space to accommodate documents</li> </ul> <p>3. Certain requirements of the Health and Safety at Work Act (or its equivalent) i.e.</p> <ul style="list-style-type: none"> <li>a. employers must provide a written health and safety policy</li> <li>b. employees must follow the health and safety policy</li> <li>c. employees must follow training provided</li> <li>d. employees must use safety equipment and report any maintenance issues</li> <li>e. employees should report any slips, trips or falls</li> <li>f. employers must provide and maintain safety equipment</li> </ul>	
		<p>4. Manual Handling Operations Regulations i.e.</p> <ul style="list-style-type: none"> <li>a. employees must use guidelines/follow training provided when lifting</li> <li>b. lifting can relate to objects, people or animals</li> <li>c. appropriate equipment must be used to move heavy loads</li> </ul> <p>5. Personal Protective Equipment Regulations i.e.</p> <ul style="list-style-type: none"> <li>a. employers should provide appropriate equipment and clothing as required by the job role</li> <li>b. employees should use equipment and clothing provided</li> <li>c. requirement to report issues with equipment to the employer</li> </ul>	
	2.2	<p>Confidentiality of information (this is currently called the Data Protection Act, or its equivalent) i.e.</p> <p>1. Forms of personal information that a business might hold about employees and customers which are covered by the Data Protection Act (or its equivalent) i.e.</p>	2.2 To include; that data protection legislation requires an employer to maintain the confidentiality of any personal information held about employees and customers but that the employee also has the responsibility to

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>a. name</li> <li>b. address</li> <li>c. date of birth</li> <li>d. contact details</li> <li>e. bank account details</li> </ul> <p>2. Reasons why an employee might ask for personal customer information i.e.</p> <ul style="list-style-type: none"> <li>a. delivery information</li> <li>b. bank details for ongoing payment</li> <li>c. emailing newsletters or special offers to customers</li> <li>d. one-off payment by customers for online orders, warranty or guarantee information</li> </ul>	<p>maintain the confidentiality of any information which they may access. See section 3.1 for methods of maintaining confidentiality.</p>
		<p>3. Types of information classed as sensitive personal data i.e.</p> <ul style="list-style-type: none"> <li>a. race or ethnic origin</li> <li>b. political opinions</li> <li>c. religious beliefs</li> <li>d. trade union membership</li> <li>e. physical or mental health</li> </ul> <p>2.3 Equality Act (or its equivalent) i.e.</p> <p>1. Four main types of discrimination as defined by the Equality Act (or its equivalent) i.e.</p> <ul style="list-style-type: none"> <li>a. direct discrimination</li> <li>b. indirect discrimination</li> <li>c. harassment</li> <li>d. victimisation</li> </ul> <p>2. Grounds for discrimination i.e. businesses and employees cannot discriminate against people because of:</p> <ul style="list-style-type: none"> <li>a. age</li> <li>b. being a transsexual person</li> <li>c. being married or in a civil partnership</li> </ul>	<p>2.3</p> <p>Discrimination may relate to colleagues, customers or other business contacts. Learners must know that these grounds for discrimination may influence behaviour in the workplace.</p> <p>To include that employees or potential employees should not be discriminated against when decisions are made in relation to:</p> <ul style="list-style-type: none"> <li>– recruitment and selection</li> </ul>

	Learning Outcome The Learner will:		Teaching Content The Learner must be taught:		Teaching exemplification
			<ul style="list-style-type: none"> <li>d. having a disability</li> <li>e. having had a baby or being pregnant</li> <li>f. gender</li> <li>g. race i.e. race, colour, ethnic origin or nationality</li> <li>h. religion or belief</li> <li>i. sexual orientation</li> </ul> <p>3. Actions to avoid discrimination i.e.</p> <ul style="list-style-type: none"> <li>a. employers should provide employees with a copy of policies that clarify expectations regarding discrimination</li> <li>b. employers should make reasonable adjustments to the workplace, and/or to their expectations, if an employee has a disability</li> <li>c. managers should not be seen to favour team members on any basis</li> </ul>		<ul style="list-style-type: none"> <li>– pay rates/levels</li> <li>– training and development</li> <li>– promotion opportunities</li> </ul>
3	Know about policies related to good conduct	3.1	<p>Policies and procedures influencing behaviour in the workplace i.e.</p> <p>1. Absence procedure i.e.</p> <ul style="list-style-type: none"> <li>a. an employee must notify their line manager on the first day of absence</li> <li>b. the line manager should be updated as to their return date</li> <li>c. when a note from a doctor is required, i.e. after a certain length of absence</li> <li>d. holidays/leave</li> </ul> <p>2. Anti-discrimination, bullying and harassment policy i.e.</p> <ul style="list-style-type: none"> <li>a. what type of behaviour in the workplace can be seen to be discriminatory, bullying or harassment</li> <li>b. what action an employee should take if this is witnessed in the workplace</li> <li>c. what action a line manager would take if such behaviour is reported</li> </ul>	3.1	Section 3.1 considers some of the workplace policies and procedures relating to discrimination and equality.

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<p>3. Data protection policy i.e.</p> <ul style="list-style-type: none"> <li>a. types of data which must remain confidential</li> <li>b. methods of protecting data i.e.               <ul style="list-style-type: none"> <li>i. personal and network passwords</li> <li>ii. screen-savers</li> <li>iii. access to information on a 'need to know' basis</li> <li>iv. secured filing cabinets</li> </ul> </li> </ul> <p>4. Dress code and appearance policy i.e.</p> <ul style="list-style-type: none"> <li>a. typical uniform requirements in these sectors</li> <li>b. business dress code if no uniform is required</li> <li>c. policy towards other elements of appearance such as tattoos, piercings, hair style/colour and make-up</li> <li>d. potential differences when working onsite or offsite</li> <li>e. conduct when wearing uniform/company branded clothing</li> </ul> <p>5. Drug and alcohol policy i.e.</p> <ul style="list-style-type: none"> <li>a. definitions of drug dependence and alcohol dependence</li> <li>b. what to do if a colleague is under the influence of alcohol or drugs</li> <li>c. why businesses have a drug and alcohol policy, i.e.               <ul style="list-style-type: none"> <li>i. impact on colleagues e.g. having an increased share of the workload</li> <li>ii. increased absenteeism</li> <li>iii. increased likelihood of accidents/injury</li> <li>iv. lower productivity</li> <li>v. theft</li> </ul> </li> </ul> <p>6. Health and safety policy i.e.</p> <ul style="list-style-type: none"> <li>a. how an employee should behave to ensure their own safety and the safety of other employees               <ul style="list-style-type: none"> <li>i. behave professionally at all times (e.g. not</li> </ul> </li> </ul>	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<p>running)</p> <ul style="list-style-type: none"> <li>ii. not leave items where they may be a hazard</li> <li>iii. report anything that could affect the safety of employees, customers and/or visitors</li> <li>iv. wear appropriate clothing and/or any safety equipment provided</li> </ul> <p>7. Non-smoking policy i.e.</p> <ul style="list-style-type: none"> <li>a. company protocol for smokers</li> <li>b. where a designated smoking area can be found</li> <li>c. how often employees are allowed to have smoking breaks</li> </ul> <p>8. Use of Internet at work policy i.e.</p> <ul style="list-style-type: none"> <li>a. Policies about: <ul style="list-style-type: none"> <li>i. use of personal email</li> <li>ii. use of work email <ul style="list-style-type: none"> <li>• appropriate use of language in work emails</li> </ul> </li> <li>iii. use of social media <ul style="list-style-type: none"> <li>• posting photos/videos of yourself in work uniform</li> <li>• posting comments about the organisation/colleagues</li> </ul> </li> </ul> </li> </ul>	

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:		Teaching exemplification
		9. Use of mobile phone at work i.e. <ul style="list-style-type: none"> <li>a. policy about answering private telephone calls in the workplace</li> <li>b. policy about using mobile phones to access the internet/social media during working hours</li> <li>c. policy about using a mobile phone to take photos in the workplace</li> </ul> 10. Code of Conduct		Learners must know that the other policies and procedures listed in 3.1 may sometimes be summarised in a Code of Conduct.
		3.2 What happens if employees do not behave appropriately i.e. <ul style="list-style-type: none"> <li>1. Consequences for the employee i.e.               <ul style="list-style-type: none"> <li>a. disciplinary procedures</li> <li>b. dismissal</li> <li>c. formal complaints from customers</li> </ul> </li> <li>2. Consequences for the employer i.e.               <ul style="list-style-type: none"> <li>a. fines and/or compensation claims</li> <li>b. grievance procedures i.e.                   <ul style="list-style-type: none"> <li>i. one employee starting grievance procedures against another</li> </ul> </li> <li>c. adverse media attention</li> <li>d. loss of customers</li> <li>e. loss of revenue</li> <li>f. loss of profit</li> </ul> </li> </ul>	3.2	Learners must know what each of these consequences mean and when they might occur.
		3.3 The requirement to meet deadlines i.e. <ul style="list-style-type: none"> <li>1. Know what drives internal deadlines i.e.               <ul style="list-style-type: none"> <li>a. Colleague availability</li> <li>b. Workload</li> <li>c. Office hours</li> <li>d. Knock-on effect for other departments/colleagues</li> </ul> </li> <li>2. Know what drives external deadlines i.e.               <ul style="list-style-type: none"> <li>a. Customer expectation</li> </ul> </li> </ul>	3.3	Teaching to include the context for these vocational areas as to why deadlines might be set, such as, in a sales role a customer may need a delivery date for a product.

	Learning Outcome The Learner will:		Teaching Content The Learner must be taught:		Teaching exemplification
			<ul style="list-style-type: none"> <li>b. Contract terms</li> <li>c. Legal requirements</li> </ul>		
		3.4	<p>How deadlines may affect working practices i.e.</p> <ol style="list-style-type: none"> <li>1. Ways to ensure that deadlines are met i.e.               <ol style="list-style-type: none"> <li>a. breaking down tasks</li> <li>b. using a to-do list</li> <li>c. prioritisation of tasks</li> </ol> </li> <li>2. Actions an employee could take if they are struggling to meet a deadline i.e.               <ol style="list-style-type: none"> <li>a. internal deadlines i.e.                   <ol style="list-style-type: none"> <li>i. speak to their line manager as soon as a problem is identified</li> <li>ii. ask if the deadline can be extended (with reasons)</li> <li>iii. ask for help/clarification if needed</li> <li>iv. give the manager enough notice so that alternative arrangements can be made</li> </ol> </li> <li>b. external deadlines i.e.                   <ol style="list-style-type: none"> <li>i. speak to their line manager</li> <li>ii. speak to the customer (if appropriate) as soon as a problem is identified</li> </ol> </li> </ol> </li> <li>3. Colleagues' interdependence i.e.               <ol style="list-style-type: none"> <li>a. that the completion of certain tasks may depend on others completing related tasks on time/to a certain quality</li> </ol> </li> </ol>	3.4	<p>If an employee needs information/work from a colleague before a task can be completed there are implications if the colleague doesn't meet their deadline.</p>
4	Know how to use business documents, handle payments and returns	4.1	<p>How to use business documents i.e.</p> <ol style="list-style-type: none"> <li>1. Internal staff communication i.e.           <ol style="list-style-type: none"> <li>a. agenda</li> <li>b. meeting minutes</li> <li>c. memo</li> <li>d. petty cash voucher</li> <li>e. reprographics request form</li> </ol> </li> </ol>	4.1	To include when each document might be used, its purpose and how to complete it from given information.

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>f. request for repair form</li> <li>g. returns documentation i.e. to be completed when a customer returns an item for the business' records</li> <li>h. travel expenses claim form</li> <li>2. Transactional documents i.e.               <ul style="list-style-type: none"> <li>a. credit note</li> <li>b. invoice</li> <li>c. purchase order</li> <li>d. receipt</li> </ul> </li> <li>3. Procedures associated with the use of these documents i.e.               <ul style="list-style-type: none"> <li>a. data protection protocols</li> <li>b. document storage</li> <li>c. hard-copies versus electronic copies</li> <li>d. methods of authorisation</li> <li>e. timelines</li> </ul> </li> <li>4. Common mistakes that can result in consequences to the business, the customer or the employee i.e.               <ul style="list-style-type: none"> <li>a. incorrect payments</li> <li>b. inaccurate records</li> <li>c. incorrect information being received</li> </ul> </li> </ul>	
	4.2	Methods of obtaining or making payments i.e. <ul style="list-style-type: none"> <li>1. Cash</li> <li>2. Cheque</li> <li>3. Credit card</li> <li>4. Debit card</li> <li>5. Voucher/gift card</li> <li>6. Online/digital payment methods</li> <li>7. Electronic transfer</li> <li>8. Contactless payment</li> </ul>	4.2 To include when each might be used within each of the vocational areas and what must be checked when making or receiving payments via each of these methods.

	Learning Outcome The Learner will:		Teaching Content The Learner must be taught:		Teaching exemplification
		4.3	<ol style="list-style-type: none"> <li>1. Know how to handle cash payments i.e.               <ol style="list-style-type: none"> <li>a. ensuring large transactions are authorised by senior staff</li> <li>b. ensuring the authenticity of bank notes</li> <li>c. not accepting outdated bank notes</li> <li>d. ensuring accuracy when entering figures onto a computer system or when writing down figures</li> <li>e. ensuring accuracy when handling money/change</li> <li>f. not rejecting legal currency e.g. Scottish/Irish bank notes</li> </ol> </li> <li>2. Methods of minimising error when handling cash payments i.e.               <ol style="list-style-type: none"> <li>a. ask a colleague to check figures and/or calculations</li> <li>b. double-check your own calculations or figures for errors</li> <li>c. double-check money accepted/change given</li> </ol> </li> <li>3. Know risks involved when handling payments i.e.               <ol style="list-style-type: none"> <li>a. employee dishonesty</li> <li>b. power cut (e.g. cannot accept electronic payment and tills unlikely to work for cash transactions)</li> <li>c. risk of fraud (e.g. hacking) when bank details have been provided for electronic money transfers</li> <li>d. risk that cheques may be rejected by the bank</li> </ol> </li> </ol>	4.3	Learners to know the risks that may be present in the context of each of the three vocational areas. Learners must also know errors that may occur in the context of the vocational areas and how employees can attempt to minimise the chance of error.
5	Know how to be revenue and cost aware	5.1	<p>Ways in which employees may positively or negatively influence business' revenue i.e.</p> <ol style="list-style-type: none"> <li>1. Level of accuracy</li> <li>2. Level of product knowledge</li> <li>3. Quality of customer service provided</li> <li>4. Selling skills</li> <li>5. Organisational skills</li> </ol>	5.1	To include the likely sources of revenue (selling products and providing services) for service sector organisations.

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		5.2 Costs that a business has to pay i.e. <ol style="list-style-type: none"> <li>1. Stock (to sell)</li> <li>2. Stock (to use)</li> <li>3. Equipment</li> <li>4. Wages/salaries</li> <li>5. Other staff costs (e.g. sick pay, uniform, training)</li> <li>6. Utility bills</li> <li>7. Rent</li> </ol>	5.2 To include definitions of each of these costs and knowledge of how they relate to service sector organisations; such as, a retail business will need stock to sell whereas a cafe will need stock to use in the preparation of meals. Learners will only need a basic overview of typical staff costs; detailed knowledge of each will not be required. This knowledge can then be built on in 5.3 when considering their own influence on these costs.
		5.3 Factors impacting on costs i.e. <ol style="list-style-type: none"> <li>1. Breakages</li> <li>2. Damaged stock</li> <li>3. Wastage</li> <li>4. Incorrect quantities recorded</li> <li>5. Employee absence</li> </ol>	5.3 Wastage to include general and vocational area specific detail such as leaving equipment on standby, leaving lights on, food becoming out-of-date. Incorrect quantities to include vocational area specific detail such as portion sizes, alcohol measures, weighed goods.

	Learning Outcome The Learner will:		Teaching Content The Learner must be taught:		Teaching exemplification
6	Know how to use appropriate types of communication	6.1	<p>Different types of communication and their features i.e.</p> <ol style="list-style-type: none"> <li>1. Written i.e.               <ol style="list-style-type: none"> <li>a. email                   <ol style="list-style-type: none"> <li>i. can be sent to many people at the same time</li> <li>ii. documents and/or images can be attached</li> <li>iii. information can be sent quickly</li> <li>iv. questions can be responded to quickly</li> </ol> </li> <li>b. letter                   <ol style="list-style-type: none"> <li>i. can be used for formal communication</li> <li>ii. presents the corporate profile to external stakeholders</li> <li>iii. takes time to reach the recipient</li> </ol> </li> <li>c. report                   <ol style="list-style-type: none"> <li>i. based on fact/research rather than personal opinion</li> <li>ii. presents detailed information</li> </ol> </li> </ol> </li> <li>2. Verbal i.e.               <ol style="list-style-type: none"> <li>a. face-to-face                   <ol style="list-style-type: none"> <li>i. documents can easily be viewed and discussed</li> <li>ii. non-verbal communication can also be observed</li> <li>iii. questions can be asked and answered quickly</li> </ol> </li> <li>b. presentations                   <ol style="list-style-type: none"> <li>i. information can be shared with many people at the same time</li> <li>ii. information such as graphs, charts and images can also be shared and discussed</li> <li>iii. questions can be asked for clarification</li> </ol> </li> </ol> </li> </ol>	6.1	<p>To include; that some forms of communication, such as face-to-face and emails, can be either formal or informal depending on who the communication is between.</p> <p>To include; when each type of communication might be used within the vocational areas. This should link with the use of different types of communication as listed in the teaching content of 6.4.</p> <p>Impact of non-verbal communication on effective interaction with customers and colleagues within the workplace:</p> <ul style="list-style-type: none"> <li>– ability to judge the mood of customers/colleagues</li> <li>– ability to judge the needs of customers/colleagues</li> <li>– ability to meet the needs of customers/colleagues</li> <li>– appearing helpful/unhelpful</li> <li>– appearing interested/disinterested</li> </ul>

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>c. telephone               <ul style="list-style-type: none"> <li>i. discussions can take place without the requirement to be in the same location</li> <li>ii. mobile phones make contact easier/quicker to gain immediate responses</li> <li>iii. one-to-one or conference calls</li> </ul> </li> <li>3. Electronic i.e.               <ul style="list-style-type: none"> <li>a. email</li> <li>b. picture message (MMS)</li> <li>c. social media</li> <li>d. text message (SMS)</li> </ul> </li> <li>4. Non-verbal communication i.e.               <ul style="list-style-type: none"> <li>a. active listening                   <ul style="list-style-type: none"> <li>i. making eye contact with the speaker</li> <li>ii. nodding in agreement</li> <li>iii. smiling</li> <li>iv. more appropriate one-to-one or in small groups</li> </ul> </li> <li>b. passive listening                   <ul style="list-style-type: none"> <li>i. listener does not react to what is being said</li> <li>ii. more appropriate in large groups such as during a presentation</li> </ul> </li> <li>c. open body language                   <ul style="list-style-type: none"> <li>i. making eye contact</li> <li>ii. uncrossed arms and legs</li> <li>iii. using gestures</li> </ul> </li> <li>d. closed body language                   <ul style="list-style-type: none"> <li>i. crossed arms and legs</li> <li>ii. keeping hands close to the body</li> <li>iii. not making eye contact</li> </ul> </li> </ul> </li> </ul>	—

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:		Teaching exemplification
		<ul style="list-style-type: none"> <li>e. use of facial expressions               <ul style="list-style-type: none"> <li>i. frowning to show disagreement</li> <li>ii. making eye contact suggests trust</li> <li>iii. raising eyebrows to show surprise</li> <li>iv. smiling can show approval or friendliness</li> <li>v. yawning to show boredom</li> <li>vi. some methods of communication do not allow the use of facial expressions which might affect the message sent/received</li> </ul> </li> <li>f. the impact that different forms of non-verbal communication may have               <ul style="list-style-type: none"> <li>i. support the verbal message e.g. pointing at relevant information</li> <li>ii. contradict the verbal message e.g. facial expressions contradicting what is being said</li> </ul> </li> </ul>		—
		6.2 Key information or layout of different types of written business communication i.e. <ol style="list-style-type: none"> <li>1. Letter</li> <li>2. Report</li> <li>3. Email</li> </ol>	6.2	To include an overview of standard professional/business layouts for each document.
		6.3 <ol style="list-style-type: none"> <li>1. Telephone skills i.e.               <ul style="list-style-type: none"> <li>a. identify yourself clearly</li> <li>b. use clear speech</li> <li>c. ensure that the message is fully understood</li> <li>d. use active listening techniques</li> <li>e. use professional language (e.g. no slang or inappropriate language)</li> <li>f. use the correct form of address e.g. Mr Smith</li> </ul> </li> </ol>		
		2. Know the different features of telephone systems i.e. <ol style="list-style-type: none"> <li>a. voicemail</li> </ol>		

	Learning Outcome The Learner will:	Teaching Content The Learner must be taught:	Teaching exemplification
		<ul style="list-style-type: none"> <li>b. call-holding</li> <li>c. call-redirecting</li> <li>d. call-waiting</li> <li>e. teleconferencing</li> </ul>	
		<p>6.4 Know the key factors which influence the type of communication chosen i.e.</p> <ol style="list-style-type: none"> <li>1. Communicating with colleague(s)/ manager(s)/supervisor(s)</li> <li>2. Communicating with other businesses</li> <li>3. Promoting the business to customers/potential customers</li> <li>4. Providing customers with information about a product/service</li> <li>5. Responding to customer complaints</li> <li>6. Responding to customer queries</li> <li>7. Taking or making an order/booking</li> </ol>	<p>6.4 Learners must know that the choice of communication will be affected by:</p> <ul style="list-style-type: none"> <li>– who the recipient/audience is</li> <li>– the message content</li> <li>– speed requirements</li> </ul>

## LEARNING OUTCOME (LO) WEIGHTINGS

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Each learning outcome in this unit has been given a percentage weighting. This reflects the size and demand of the content you need to cover and its contribution to the overall understanding of this unit. See table below:

<b>LO1</b>	30%
<b>LO2</b>	12.5%
<b>LO3</b>	20%
<b>LO4</b>	15%
<b>LO5</b>	7.5%
<b>LO6</b>	15%

## ASSESSMENT GUIDANCE

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All Learning Outcomes are assessed through an externally set and marked examination paper, worth a maximum of 40 marks and 45 minutes in duration.

Please note in relation to LO2, by current legislation we mean the legislation specified or its equivalent, should it be revised, or differ, for example, in Northern Ireland.

## MEANINGFUL EMPLOYER INVOLVEMENT – A REQUIREMENT FOR TECHNICAL CERTIFICATE QUALIFICATIONS

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The minimum amount of employer involvement must relate to at least one or more of the elements of the mandatory content. This unit is mandatory in the following qualifications:

Level 2 Cambridge Technical Certificate in Business Practices

Level 2 Cambridge Technical Diploma in Business Administration

Level 2 Cambridge Technical Diploma in Customer Service

Level 2 Cambridge Technical Diploma in Retail

These qualifications have been designed to be recognised as Technical certificates in performance tables in England. It is a requirement of these qualifications for centres to secure employer involvement through delivery and/or assessment of these qualifications for every learner.

Eligible activities and suggestions/ideas that may help you in securing meaningful employer involvement for this unit are given in the table below.

Please refer to the Qualification Centre Handbook (Section 5, Involving employers in teaching, learning and assessment) for further information including a list of activities that are not considered to meet this requirement.

### Meaningful employer involvement

It is recommended that students undertake structured work-experience or work-placements that develop skills and knowledge relevant to these qualifications.

They may also benefit from industry professionals visiting the centre to act as guest speakers.

You can find further information on employer involvement in the delivery of qualifications in the following documents:

- [Employer involvement in the delivery and assessment of vocational qualifications](#)
- [DfE work experience guidance](#).

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OCR customer contact centre

**Vocational qualifications**

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