

Cambridge TECHNICALS LEVEL 2

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TECHNICALS  
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# ***CUSTOMER SERVICE***

Unit 4

Delivering effective customer service

R/615/5620

Guided learning hours: 60

Version 1 September 2018

## LEVEL 2

### UNIT 4: Delivering effective customer service

R/615/5620

Guided learning hours: 60

Essential resources required for this unit: None

**Assessment: This unit is internally assessed by the centre and externally moderated by OCR.**

#### UNIT AIM

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Effective customer service is dealing with customers efficiently and in a friendly manner. It is something that can set an organisation apart from others of a similar kind.

In this unit, you will use your customer service skills to recognise customer needs and offer customers reassurance within the limits of your authority. You will accurately record customer information and understand the importance of maintaining accurate customer records.

Agreeing actions with customers whilst maintaining customer satisfaction can be a challenge, which requires sensitive and careful handling on occasions. You will follow procedures when resolving customer service issues, agree with the customer the actions that will be taken, and process the actions you have agreed. It is always important that a customer service representative follows up the actions to ensure that the customer service issue has been resolved. You will have the opportunity to follow-up customer service issues to ensure that all agreed actions have been undertaken, either by yourself or others.

You will also review your own performance and identify areas for improvement. You will review your performance with respect to addressing customer service issues and consider how you can improve your performance.

## 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, it should be noted that where e.g. is used, learners must know and be able to apply relevant examples to their work though these do not need to be the same ones specified in the unit content.

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>1. Be able to identify customer needs and offer reassurance</p>	<p>1.1 How to identify customer needs i.e.</p> <ul style="list-style-type: none"> <li>• customer focus skills i.e.               <ul style="list-style-type: none"> <li>○ use organisational greeting (e.g. good morning, good afternoon)</li> <li>○ confirm identity of customer</li> <li>○ adopt a positive tone (e.g. project an enthusiastic, natural and attentive tone)                   <ul style="list-style-type: none"> <li>▪ smile when greeting the customer</li> <li>▪ do not talk too fast</li> </ul> </li> <li>○ speak clearly</li> <li>○ be sincere</li> <li>○ use their name (e.g. Mr/Mrs Jones)</li> <li>○ active listening (e.g. listen carefully to what the customer is saying)</li> </ul> </li> <li>• use effective questioning methods to ascertain customer needs (e.g. open and probing questions)</li> </ul> <p>1.2 How to reassure customers i.e.</p> <ul style="list-style-type: none"> <li>• be sympathetic/empathetic</li> <li>• inform them that you are there to help them (do not make promises you cannot keep)</li> <li>• offer customer service options, within procedures</li> </ul> <p>1.3 Limits of authority i.e.</p> <ul style="list-style-type: none"> <li>• what you can do or say</li> <li>• when you must escalate to someone else</li> </ul>
<p>2. Be able to record customer information accurately</p>	<p>2.1 Steps for accurately recording customer information i.e.</p> <ul style="list-style-type: none"> <li>• record customer information i.e.               <ul style="list-style-type: none"> <li>○ customer personal details (e.g. name, address, bank details, bank card details etc.)</li> <li>○ customer contact details (e.g. telephone number, mobile number, email address etc.)</li> <li>○ customer requirements (e.g. what do they want, what is the issue/complaint etc.)</li> <li>○ availability</li> </ul> </li> <li>• Use an information storage system (e.g. paper-based, electronic)</li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> <li>• importance of recording customer information accurately i.e.               <ul style="list-style-type: none"> <li>○ ensures compliance with the Data Protection Act 1998 (or its equivalent)</li> <li>○ reduces the quantity of contact with the customer</li> <li>○ avoidance of duplication (e.g. periodically checking information as email addresses can change)</li> <li>○ enables the organisation to evaluate their strengths and weaknesses so that they can improve the quality of their service/products in the future</li> <li>○ provides information on how best an organisation can market its products and/or services</li> </ul> </li> </ul>
<p>3. Be able to agree actions to resolve customer service issues</p>	<p>3.1 Procedures for resolving customer service issues i.e.</p> <ul style="list-style-type: none"> <li>• follow procedures to resolve customer service issues i.e.               <ul style="list-style-type: none"> <li>○ offer the customer 'real' solutions (e.g. tell them what you can do, do not dwell on what you cannot do for them)</li> <li>○ resolve the situation promptly if possible</li> <li>○ stay within the limits of your own authority</li> <li>○ keep the customer appraised of the situation (e.g. tell them what you are doing/going to do and the timescales)</li> <li>○ if escalating an issue, explain this to the customer, the reasons why and the approach this will take</li> <li>○ follow-up if there is a delay to the resolution to ensure that customer is updated on progress and/or that if someone else is supposed to be responding to them that this has happened</li> <li>○ thank the customer for their custom and check to ensure that their issue has been resolved</li> </ul> </li> <li>• impact of not following procedures i.e.               <ul style="list-style-type: none"> <li>○ not being able to meet customer expectations, due to e.g.                   <ul style="list-style-type: none"> <li>▪ promising something that is not possible/or is against organisational policy</li> <li>▪ not referring the issue to the correct department</li> <li>▪ not following-up</li> </ul> </li> <li>○ loss of customer</li> <li>○ causing additional costs to the organisation (e.g. due offering expensive solutions outside of remit)</li> </ul> </li> </ul> <p>3.2 How to agree actions with customers i.e.</p> <ul style="list-style-type: none"> <li>• what the next steps are</li> <li>• what the customer can expect to happen and potential timescales</li> <li>• confirm with customer that they understand what you have told them and that they are satisfied</li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<p>3.3 Process actions and follow-up procedure i.e.</p> <ul style="list-style-type: none"> <li>• process the actions as agreed with the customer e.g. <ul style="list-style-type: none"> <li>○ arrange for delivery of product</li> <li>○ arrange for replacement product</li> <li>○ arrange for repair to take place at customer property</li> <li>○ arrange a refund to the customer</li> <li>○ escalate issue to relevant person</li> </ul> </li> <li>• follow-up procedure (ensure that the commitment you have made to the customers has been addressed) e.g. <ul style="list-style-type: none"> <li>○ internal follow-up actions – checking with colleagues that e.g. <ul style="list-style-type: none"> <li>▪ the customer had their replacement product, repair, refund</li> <li>▪ the relevant person contacted the customer</li> </ul> </li> <li>○ external follow-up actions e.g. <ul style="list-style-type: none"> <li>▪ contacting the customer to see if they are satisfied with the outcome</li> </ul> </li> </ul> </li> <li>• impact on organisations of not following-up on customer service issues i.e. <ul style="list-style-type: none"> <li>○ loss of income/reduction in profit</li> <li>○ loss of reputation</li> <li>○ loss of custom</li> <li>○ reduction in market share</li> </ul> </li> </ul>
<p>4. Be able to review the effectiveness of customer service delivery</p>	<p>4.1 How to reflect on own performance i.e.</p> <ul style="list-style-type: none"> <li>• strengths</li> <li>• weaknesses</li> <li>• challenges</li> <li>• improvements</li> </ul>

## GRADING CRITERIA

LO	Pass	Merit	Distinction
The learner will:	The assessment criteria are the Pass requirements for this unit.	To achieve a Merit the evidence must show that, in addition to the Pass criteria, the candidate is able to:	To achieve a Distinction the evidence must show that, in addition to the Pass and Merit criteria, the candidate is able to:
1. Be able to identify customer needs and offer reassurance	P1: Follow procedures to identify customer needs		
	P2: Reassure customers, within limits of own authority, of steps to be taken		
2. Be able to record customer information accurately	P3: Record customer information accurately	M1: Explain the importance of recording customer information accurately	
3. Be able to agree actions to resolve customer service issues	P4: Follow procedures to resolve customer service issues		D1: Explain the impact on organisations of not following procedures when resolving customer service issues
	P5: Agree actions to be taken with the customer		
	P6: Process the actions as agreed with the customer	M2: Follow-up on the customer service situation, in line with procedure, to ensure that all agreed actions have been addressed	D2: Review the effectiveness of the procedure for following-up on customer service situations
4. Be able to review the effectiveness of customer service delivery	P7: Reflect on own performance when delivering effective customer service	M3: Identify areas for improvement when delivering effective customer service	

## ASSESSMENT GUIDANCE

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It is important for learners to have the opportunity to learn and apply their knowledge and skills to meaningful substantial tasks, in order to successfully achieve the unit.

Feedback to learners: you can discuss work-in-progress towards summative assessment with learners to make sure it's being done in a planned and timely manner. It also provides an opportunity for you to check the authenticity of the work. You must intervene if you feel there's a health and safety risk.

Learners should use their own words when producing evidence of their knowledge and understanding. When learners use their own words it reduces the possibility of learners' work being identified as plagiarised. If a learner does use someone else's words and ideas in their work, they must acknowledge it, and this is done through referencing. Just quoting and referencing someone else's work will not show that the learner knows or understands it. It has to be clear in the work how the learner is using the material they have referenced **to inform their** thoughts, ideas or conclusions.

For more information about internal assessment, including feedback, authentication and plagiarism, see the centre handbook. Information about how to reference is in the *OCR Guide to Referencing* available on our website: <http://www.ocr.org.uk/i-want-to/skills-guides/>.

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

In order to meet Grading Criteria **P1**, learners should evidence that they can follow procedures to identify customer needs on **at least two different occasions**. **P2** should also be evidenced in these two different situations.

**P3** requires learners to accurately record customer information **on two different occasions**. These occasions may be the same as those met in **P1** and **P2**, or different occasions if those do not require the recording of information.

In order to meet **M2**, learners must evidence that, following the processing of actions (**P6**), they have followed up the customer service situation to ensure that all agreed actions have been taken in line with procedure (the follow-up may be with a supplier, a colleague etc.). Where a resolution is delayed the learner should evidence that they have kept the customer updated on progress.

## SYNOPTIC ASSESSMENT AND LINKS WITH OTHER UNITS

Synoptic assessment is a feature of this qualification and it requires learners to use an appropriate selection of their skills, knowledge and understanding, acquired through all of the units that make up their qualification, in an integrated way and apply them to a key task or tasks.

This helps learners to develop their appreciation and understanding of the connections between the different elements of learning in this qualification to help make their curriculum meaningful and better prepare them for employment in the Customer Service sector, please see section 6 of the centre handbook for more detail.

Links between this unit and other units:

Specific LO from this unit	Name of other unit and related LO
LO1 Be able to identify customer needs and offer reassurance	Unit 1 Principles of working in service sector organisations LO6 Unit 2 Understand customer expectations and issues LO1 Unit 4 Handling challenging customer service situations LO3
LO2 Be able to record customer information	Unit 2 Understand customer expectations and issues LO3 Unit 5 Obtaining customer feedback LO2
LO3 Be able to agree actions to resolve customer service issues	Unit 1 Principles of working in service sector organisations LO6 Unit 2 Understand customer expectations and issues LO4, LO5 Unit 4 Handling challenging customer service situations LO3 Unit 7 Enhancing the customer experience LO3
LO4 Be able to review the effectiveness of customer service delivery	Unit 4 Handling challenging customer service situations LO4 Unit 7 Enhancing the customer experience LO4



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

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 Level 2 Cambridge Technical Diploma in Customer Service.

This qualification has been designed to be recognised as a Technical Certificate in performance tables in England. It is a requirement of this qualification for centres to secure employer involvement through delivery and/or assessment of this qualification 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 Handbook for further information including a list of activities that are not considered to meet this requirement.

### Meaningful employer involvement

It is recommended that learners undertake structured work-experience or work-placements that develop skills and knowledge relevant to this unit.

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](#).

**ocr.org.uk/business**

OCR customer contact centre

**Vocational qualifications**

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