

Cambridge TECHNICALS LEVEL 2

CUSTOMER SERVICE

Cambridge
TECHNICALS
2016

Unit 5

Obtaining and using customer
feedback

D/615/5619

Guided learning hours: 60

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LEVEL 2

UNIT 5: Obtaining and using customer feedback

D/615/5619

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

A business cannot survive without customers; they are crucial to its success. Customers, whether new or returning, expect to receive excellent service from each and every person in the organisation.

An important part of a Customer Service Advisor's role is to prepare for and gather customer feedback from customers on their opinion of the organisation's products/services and customer service delivery as a whole. Customer feedback is used by organisations to identify areas where it is performing well, and where it needs to improve its processes, procedures, products/services or the skills of its people.

This unit will develop your knowledge, skills and understanding of the different methods used to gather and record customer feedback. You will demonstrate the skills needed to communicate effectively with customers in order to accurately obtain and record feedback and present the results of this feedback to stakeholders.

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:
1. Be able to obtain customer feedback	1.1 How organisations use customer feedback i.e. to review: <ul style="list-style-type: none"> • quality of services/products • development of services/products • availability of services/products • delivery of services/products • accessibility of services/products • effectiveness of customer service delivery quality of aftersales support/follow up i.e. <ul style="list-style-type: none"> ○ handling of complaints/queries • competitor performance • employee skills and performance 1.2 The appropriate methods to obtain customer feedback i.e. <ul style="list-style-type: none"> • observation of customers (e.g. what they are doing, looking at etc.) • telephone • face-to-face • website (e.g. live chat) • social media • customer reviews (e.g. blogs) • questioning i.e. <ul style="list-style-type: none"> ○ open ○ closed ○ probing • customer feedback forms • email • use of specialist terminology • use of language 1.3 To comply with current legislation and regulation regarding confidentiality and data protection of customer information (e.g. handling customers' personal details)

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<p>1.4 The potential issues when gathering customer feedback i.e.</p> <ul style="list-style-type: none"> • potential issues when gathering customer feedback i.e. <ul style="list-style-type: none"> ○ customers unwilling to give feedback as it is too time consuming ○ customer not answering telephone call back/emails ○ reliability of feedback from customers (e.g. the sample of customers who give feedback may not be fully representative) ○ customers could be disgruntled at due to previous customer service issues • methods to overcome potential customer feedback issues i.e. <ul style="list-style-type: none"> ○ use different communication method ○ simplify feedback format/documentation (e.g. language/translation of documents) ○ take on board customers' issues to overcome future problems in customer service
2. Be able to accurately record customer feedback	<p>2.1 To record customer feedback i.e.</p> <ul style="list-style-type: none"> • use of correct documentation • check for accuracy and validity of information • secure storage of customer information
3. Be able to review customer feedback for a specified purpose	<p>3.1 How to use customer feedback for a specified purpose</p> <ul style="list-style-type: none"> • select customer feedback for a specified purpose i.e. <ul style="list-style-type: none"> ○ identify the criteria which make the feedback useful ○ extract relevant information • summarise customer feedback i.e. <ul style="list-style-type: none"> ○ identify patterns and trends ○ identify strengths and weaknesses highlighted by the feedback • recommend actions to address customer feedback i.e. <ul style="list-style-type: none"> ○ improvements to products and/or services ○ staff training (e.g. product knowledge)

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 obtain customer feedback	P1: Describe how organisations use customer feedback	M1: Demonstrate how to overcome potential issues when gathering customer feedback	
	P2: Use appropriate methods to obtain customer feedback	M2: Review the effectiveness of the methods used to obtain customer feedback	D1: Recommend improvements to the methods used to obtain customer feedback
	P3: Follow legal requirements when obtaining customer feedback and explain how this has been achieved		
	P4: Explain the potential issues when gathering customer feedback		
2. Be able to accurately record customer feedback	P5: Accurately record customer feedback for a specified purpose		
3. Be able to review customer feedback for a specified purpose	P6: Review customer feedback for a specified purpose	M3: Summarise the patterns and trends of customer feedback	D2: Recommend action(s) to be taken to address the key points from customer feedback

ASSESSMENT GUIDANCE

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/>.

In order to meet Grading Criteria **P2**, learners must use **at least two different** methods to obtain customer feedback (e.g. observation of customers and questioning of customers). In **M2** they must review the effectiveness of the methods used, including the positives and negatives of each method. This review should also include a review of any relevant documentation (e.g. a form or questionnaire, or a script if it is telephone/face-to-face feedback). In order to meet **D1**, learners must make valid recommendations for improving the methods that they used, justifying their recommendations.

To meet Grading Criteria **P3**, learners must explain how they met legal requirements when obtaining the customer feedback (**P2**).

P4 requires learners to explain the potential issues when gathering customer feedback. This should relate specifically to issues encountered when meeting **P2** but must also consider potential issues that may be met using other methods (as per the Teaching Content for 1.4).

P6, **M3** and **D2** relate to Teaching Content 3.1. **P6** requires learners to identify the specific purpose for the review and then review the customer feedback received for that purpose. Learners should choose, or be provided with, a specified purpose for customer feedback. They must identify **at least three** criteria which make the feedback useful and extract relevant information, identifying patterns and trends and highlighting **at least three strengths** and **at least three weaknesses** of the feedback.

SYNOPTIC ASSESSMENT AND LINKS TO 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 obtain customer feedback	Unit 1 Principles of working in service sector organisations LO6 Unit 2 Understand customer expectations and issues LO2, LO3 Unit 3 Social media in the workplace LO3 Unit 4 Handling challenging customer service situations LO2
LO2 Be able to accurately record customer feedback	Unit 2 Understand customer expectations and issues LO2 Unit 6 Delivering effective customer service LO2
LO3 Be able to review customer feedback for a specified purpose	Unit 3 Social media in the workplace LO3 Unit 7 Enhancing the customer experience LO2

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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