

Cambridge TECHNICALS LEVEL 2

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CUSTOMER SERVICE

Unit 7

Handling challenging customer
service situations

Y/615/5618

Guided learning hours: 60

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LEVEL 2

UNIT 7: Handling challenging customer service situations

Y/615/5618

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

Within a customer service role you will have to deal with a wide range of customers, whether they are internal or external to your organisation. There will be occasions when you come across challenging situations and need to consider the customers and how you interact with them. This in itself can be a challenge for you.

This unit will help you to understand different types of customers as well as the influencing factors in different challenging situations, so that you are able to react in a manner which will meet the needs of the customers and address the challenging situation, whilst complying with relevant organisational requirements and legislation. You will select and use communication methods and techniques in order to support your customer throughout the challenging situations. You will agree courses of action with appropriate people and communicate these actions to the customer. You will reflect on your performance when handling challenging situations and consider areas for improvement.

This unit acts as a synoptic unit within the Level 2 Cambridge Technical Diploma in Customer Service and provides the opportunity for you to draw on your skills, knowledge and understanding developed throughout this 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, 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 assess the causes of challenging customer service situations	1.1 Influencing factors in challenging customer service situations i.e. <ul style="list-style-type: none"> • typical issues e.g. <ul style="list-style-type: none"> ○ product out of stock ○ product faulty ○ goods not delivered (e.g. late or not arrived) ○ complaints about service ○ lack of customer understanding (e.g. technical product or service) • customer characteristics i.e. <ul style="list-style-type: none"> ○ gender ○ age ○ location ○ language ○ ethnicity ○ internal ○ external ○ cultural ○ religious ○ specialist (e.g. understands subject) ○ disability (e.g. requires use of sign language, or requires specialist equipment) 1.2 Indicators of challenging customers i.e. <ul style="list-style-type: none"> • angry • upset • indecisive • confused (e.g. lacks understanding or knowledge) • unreasonable • confrontational • frustrated • customer in need of specialist equipment (e.g. access arrangements such as audio/visual aids)

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>2. Be able to gather information to address the needs of customers in challenging customer service situations</p>	<p>2.1 Customer communication methods i.e.</p> <ul style="list-style-type: none"> • face-to-face • email • letter • social media • telephone • SMS <p>2.2 Techniques i.e.</p> <ul style="list-style-type: none"> • questioning • note taking • demonstration • observation • photographs • active listening • repeating key points back to customers • empathy <p>2.3 Customer needs and possible solutions i.e.</p> <ul style="list-style-type: none"> • repair • replacement • refund • product out of stock • support (technical and non-technical) • advice and guidance <p>2.4 Levels of authority when taking actions to address customer needs i.e.</p> <ul style="list-style-type: none"> • own level of authority (e.g. what you can do or whether it is to be referred) • chain of command when escalating a situation/issue (e.g. discussions and agreements of action to be taken)
<p>3. Be able to communicate actions to the customer to address their needs in challenging customer service situations</p>	<p>3.1 Methods of communicating with customers i.e.</p> <ul style="list-style-type: none"> • language i.e. <ul style="list-style-type: none"> ○ appropriate for type of customer (e.g. non-specialist would require simplified language) ○ calming ○ empathetic ○ sympathetic ○ tone • terminology i.e. <ul style="list-style-type: none"> ○ simplified for non-specialist (e.g. no use of jargon) ○ specialist language

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> • techniques i.e. <ul style="list-style-type: none"> ○ questioning i.e. <ul style="list-style-type: none"> ▪ open ▪ closed (e.g. succinct yes/no questions used to understand a technical issue a customer is having) ▪ probing ○ active listening ○ appropriate use of body language ○ recording (e.g. note taking) <p>3.2 Aspects to consider when customer needs are not met i.e.</p> <ul style="list-style-type: none"> • factors which influence organisational policy and position (e.g. company policy on refunds) • organisational drivers i.e. <ul style="list-style-type: none"> ○ retain customer base ○ increase customer base ○ retain and/or increase profit margin and sales ○ maintain positive reputation • recommending alternatives when customer expectations are not met i.e. <ul style="list-style-type: none"> ○ providing options (e.g. replace or refund, cash refund or credit note, repair or select alternative product) ○ escalating further (e.g. manufacturer, service provider, manager) <p>3.3 Completing actions and following-up i.e.</p> <ul style="list-style-type: none"> • process actions as agreed with customer i.e. <ul style="list-style-type: none"> ○ complete forms/requests for other departments (e.g. repair, service, call-back, technical support) ○ escalate ○ refer immediately to relevant person (e.g. colleague in another department, supplier, manufacturer) • follow-up on actions i.e. <ul style="list-style-type: none"> ○ liaise with colleagues/supplier/manufacturer to ensure that actions have been carried out ○ contact the customer to ensure the issue is resolved and that they are happy
4. Be able to review approach to handling customers in challenging customer service situations	<p>4.1 Review own performance i.e.</p> <ul style="list-style-type: none"> • strengths • weaknesses • challenges • development/improvements

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 assess the causes of challenging customer service situations	P1: Assess the causes of challenging customer service situations		
2. Be able to gather information to address the needs of customers in challenging customer service situations	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	
3. Be able to communicate actions to the customer to address their needs in challenging customer service situations	P4: Identify possible actions to address the needs of a customer in a specific challenging situation		
	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

LO	Pass	Merit	Distinction
	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
4. Be able to review approach to handling customers in challenging customer service situations	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		

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/>.

This unit acts as a synoptic unit within the Level 2 Cambridge Technical Diploma in Customer Service. When completing key tasks within this unit, learners will need to draw on and apply the skills, knowledge and understanding acquired through the other units that make up their qualification. As such, this unit is to be assessed towards the end of the learning programme.

In order to meet Grading Criteria **P1**, learners must assess the causes of **at least two different** challenging customer service situations. Within their assessments they must:

- Identify the issue leading to the situation (e.g. returning a faulty product)
- Identify the specific customer characteristics or indicators that make the situation challenging

To meet **P3**, learners must be able to explain the specific customer's problem to an appropriate person. The appropriate person could be a supervisor, supplier, manufacturer or relevant colleague. For **P4** they should be able to identify possible actions that they believe may address the needs of a specific customer in a challenging situation.

In order to meet **M1**, learners should consider the possible actions identified in **P4** and recommend what they consider to be the most suitable course of action to an appropriate person. The appropriate person may then take over dealings with the challenging customer situation.

P6, M3 and D1 relate to a situation when customer expectations cannot be met for a specific reason. To meet **D1**, learners must select one of the solutions recommended in **M3** as the final solution to address the situation and justify how the outcome will balance both organisational needs and customer satisfaction.

In order to meet **D2**, learners must 'go the extra mile' by following up the actions taken in **P7**, to ensure that they are fully completed to a satisfactory closure (e.g. the action may have been referred to another person for completion but the learner will follow this up to ensure that it was completed on behalf of the customer and contact the customer to ensure they are happy with the customer service provided).

SYNOPTIC ASSESSMENT

This unit acts as a synoptic unit within the Level 2 Cambridge Technical Diploma in Customer Service and provides the opportunity for you to draw on your skills, knowledge and understanding developed throughout this qualification.

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	Synoptic assessment in other unit/LO
LO1 Be able to assess the causes of challenging customer service situations	Unit 1 Principles of working in service sector organisations LO1 Unit 2 Understand customer expectations and issues LO2 Unit 4 Delivering effective customer service LO1, LO3 Unit 5 Obtaining and using customer feedback LO1 Unit 6 Enhancing the customer experience LO1, LO3
LO2 Be able to gather information to address the needs of customers in challenging customer service situations	Unit 1 Principles of working in service sector organisations LO1, LO6 Unit 2 Understand customer expectations and issues LO2, LO3, LO4, LO6 Unit 3 Social media in the workplace LO3 Unit 5 Obtaining and using customer feedback LO1
LO3 Be able to communicate actions to the customer to address their needs in challenging customer service	Unit 1 Principles of working in service sector organisations LO1, LO2, LO6

situations	Unit 2 Understand customer expectations and issues LO2, LO3, LO4, LO5, LO6 Unit 4 Delivering effective customer service LO1, LO3 Unit 6 Enhancing the customer experience LO4
LO4 Be able to review approach to handling customers in challenging customer service situations	Unit 1 Principles of working in service sector organisations LO1, LO2 Unit 2 Understand customer expectations and issues LO2, LO3, LO4, LO5, LO6 Unit 4 Delivering effective customer service LO4 Unit 6 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 the 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 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 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](#).

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