SKILLS FOR BUSINESS

STUDENT GUIDE

LEVEL 3 NVQ DIPLOMA IN CUSTOMER SERVICE (03456)

Within the Apprenticeship Framework for

Customer Service

SKILLS FOR BUSINESS

OCR

STUDENT GUIDE INTRODUCTION

You are about to start an OCR Level 3 NVQ Diploma in Customer Service. We wish you every success and hope that this will be one of many OCR qualifications which you take throughout your life.

This guide has been designed to give you information about:
*   the aims and structure of your qualification
*   the people who will be involved in your qualification and what they will do
*   the assessment process you will go through in order to gain your qualification
*   the evidence you have to produce to show you can work to the required standards
*   any extra forms you will use to help you.

ARE YOU STUDYING THIS QUALIFICATION AS PART OF AN APPRENTICESHIP FRAMEWORK?

APPRENTICESHIPS

The framework describes the qualifications that an apprentice has to achieve to successfully complete an Apprenticeship in Customer Service.

The components in this Apprenticeship are:

COMPETENCE	TECHNICAL KNOWLEDGE	KEY SKILLS/ FUNCTIONAL SKILLS/ ESSENTIAL SKILLS WALES	EMPLOYMENT RIGHTS AND RESPONSIBILITIES	PERSONAL LEARNING AND THINKING SKILLS
Level 3 NVQ Diploma in Customer Service	Level 3 Certificate in Principles of Customer Service	Application of Number Level 2 Communications Level 2 or Maths Level 2 English Level 2	Delivered through Skills CfA Employer Rights and Responsibilities workbook	Personal Learning and Thinking Skills has been mapped where evidence is naturally occurring through the mandatory units of competence. Skills CfA has provided guidance on how further evidence can be obtained through completion of the units. www.skillscfa.org/ apprenticeships/ resources.html

This qualification satisfies the competence required to complete an Apprenticeship in Customer Service.

ABOUT THIS QUALIFICATION

The OCR Customer Service suite of qualifications provides candidates with high quality, nationally recognised qualifications. They are vocationally-related, credit-based qualifications that provide valuable opportunities for individuals to develop skills, gain underpinning knowledge and understanding and demonstrate competence in the workplace or provide progression into the Customer Service sector. They support achievement of Functional Skills and relate to National Occupational Standards (NOS).

Qualification aims

The OCR Level 3 NVQ Diploma in Customer Service is aimed at candidates who will be delivering and managing service and will be accountable in the area of practice. Candidates will be working without direct supervision or on their own, such as in a commercial customer service environment.

It is suitable for candidates who:
- can influence what happens at work
- use the organisation's rules and systems flexibly to deliver good service
- question the way things are done and suggest improvements
- have good communication skills and a wide knowledge of what to do, who to see and where to go to get things done for the customer
- are aware of the commercial or other pressures facing the organisation/business.

Qualification structure

The national occupational standards for your qualification have been grouped into the main activities which make up a job. These groups of activities are called units. There are two types of units:
- **Mandatory units** – you will have to achieve all of these to get your qualification. You will also have to achieve some optional units
- **Optional units** – you will be able to choose from a number of optional units. You will receive help to choose the best optional units to match your job or interests.

Each unit has:
- **a unit aim** - this explains what the unit is all about and relates the unit content to typical tasks you may carry out
- **learning outcomes** - these set out what you are expected to know, understand or be able to do as a result of the learning process
- **assessment criteria** - these detail the requirements that you will be assessed against in order to evidence the learning outcomes
- **evidence requirements** - these detail the context in which the learning outcomes and assessment criteria should be met.

WHO WILL BE INVOLVED IN YOUR QUALIFICATION

Assessment of your qualification is carried out at your centre. Your centre may be your place of work, a college, training agency or combination of these. The people involved in the assessment process are listed below.

An **assessor** (this may be your manager or supervisor at work) will:
- help you plan and organise your workload and evidence
- provide feedback and offer advice
- examine your portfolio of evidence
- observe you carrying out your job over a period of time
- ask you questions about the work you do
- judge when you are competent and meet the national standards.

An **internal verifier**:
- is employed by your centre to maintain the quality of assessment within the centre
- will visit your place of work to see you being assessed and may wish to speak with you
- will check the assessment of your portfolio of evidence
- will check your assessor is following correct assessment procedures.

An **external verifier**:
- is contracted by OCR to ensure that your centre meets the required national standard
- will make visits to your centre to observe assessment and examine evidence in portfolios
- may wish to speak with you as part of this process
- will check the centre is following the correct assessment and verification procedures.

Witnesses
These are normally people in your workplace who regularly see you doing your job and know how your job should be done. As you plan your assessment with your assessor you will be asked to think about who these people are. They may be your supervisor or line manager.

ASSESSMENT

In order for you to effectively progress towards meeting the requirements of each assessment criterion, teachers/tutors must make sure that the supporting knowledge, understanding and skills requirements for each criterion are fully addressed.

When your assessor is satisfied that you have met all of the requirements for a unit, they must confirm this by signing an evidence record sheet for that unit to show that the assessment process is complete.

Initial assessment

Before you begin this qualification, you must have received some form of initial assessment. Initial assessment determines your starting point. It identifies any competence or knowledge you already have, and also shows where there are any gaps in your competencies and knowledge. Initial assessment is undertaken to help plan your progress through this qualification because it allows your assessor to help you understand the best place to start collecting evidence. It will also identify units which you might have difficulty finishing.

Your assessor will spend time with you at the start of your programme making sure that you:
• are taking the right level of qualification
• understand which mandatory units you have to take
• have chosen the optional units you want to take
• understand what you need to know or learn to gain the qualification
• understand what you have to do to collect evidence to show that you are competent
• agree an assessment plan
• agree and sign a learning contract.

Your assessor will agree a number of issues with you including:
• finding the best source of evidence to use for particular units
• finding the best way of assessing you
• confirming the best times, dates and places for the assessments to take place.

Your assessor will make a note of their assessment planning and regularly give you feedback.

With your assessor you will make and agree an assessment plan. This will show:
• the units the plan covers
• when you will be observed
• where you will be observed
• what you will be doing
• what evidence you will produce.

Your assessor will be looking to find tasks which you do at work which will produce evidence for more than one unit. You may be able to produce evidence for more than one unit at a time.

The assessment plan is very important as it will help you prepare for the assessment. You may need to agree with other people when you are to be assessed, especially if you work in a team. You must let your supervisor or manager know so that, as far as possible, your work does not change on the day the assessment is planned.

Each time you prepare with your assessor for an assessment in your workplace, you will make an assessment plan. You will review, update and amend your plan many times as you progress through your qualification. This is called the assessment planning cycle.

Assessment evidence

There are various assessment methods that can be used as evidence for this qualification. These will be explained in more detail in the next section of this guide.

Assessment feedback

Your assessor will give you specific feedback on your performance after assessment. You will also meet regularly to review your progress and evidence, and update your assessment plan.

Assessment decisions

When you think you have completed a unit, your assessor will make the final assessment decision. Remember that you must provide enough evidence to meet all the criteria in every unit you are claiming. You must meet all of the learning outcomes, assessment criteria and evidence requirements.

Your assessor's decision will be either
• that you are competent or
• that you are not yet competent.

If you are not yet competent, you and your assessor will return to the assessment planning cycle and decide how you can collect further evidence.

RECORDING EVIDENCE

It has been agreed that the following assessment methods are most suitable for this qualification:
- **direct observation** of practice by an assessor or by the expert witness for occupational specific units
- **examination** of evidence by an assessor
- **questioning** by an assessor
- inference of **knowledge** from direct observation
- professional **discussion** with an assessor.

In some situations, the assessor may speak to you to provide evidence of the your performance and knowledge (see **Professional discussion**).

Direct observation of practice

Direct observation is where the assessor watches what you are doing. They check your practice against the assessment criteria to determine if you are meeting the given standard.

You and your assessor should plan direct observations of practice together but it is the assessor's responsibility to record the observation properly.

After the observation has taken place, the assessor needs to record an assessment decision and the justification for the decision. The assessor must also give you feedback on your practice and the decision made.

Examination of evidence

This is where the assessor reviews the evidence you have produced to see if it meets the assessment criteria.

Evidence can be:
- a reflection of how you carried out a process
- the product of your work
- a product relating to your competence.

For example:

The process that you carry out could be recorded in an observation or witness testimony. It is the assessor's responsibility to determine if the evidence you submit for assessment meets the requirements of the qualification.

Your work could be: notebook entries, completed forms, computer records, statements obtained, or reports completed. After the assessor has examined the evidence, the assessor must record an assessment decision and the justification for the decision. The assessor must also give you feedback on your evidence and the decision made.

Questioning

Your assessor may question you or your witness for the assessment of these qualifications.

Questioning is normally an ongoing part of the assessment process, and is necessary to:
- test your knowledge of facts and procedures
- check if you understand principles and theories
- collect information on the type and purpose of the processes you have gone through.

Your assessor will record assessment decisions after they have questioned you. They will record enough information to justify the decisions they make. This does not mean that assessors will record, word for word, the questions put to you and the answers you give. However, assessors will record enough information about what they asked and how you replied to allow the assessment to be verified.

Questioning witnesses is normally an ongoing part of validating written witness statements. However, questioning witnesses should not just be used for this purpose. Assessors should be able to speak to witnesses and record, in whatever way is suitable, the verbal statements of these witnesses. A record of verbal statement is a form of witness statement and could provide valuable evidence to confirm your competence over a period of time.

Professional discussion

Professional discussion is a structured, planned and in depth discussion recorded by your assessor. It allows you to present evidence of competence and to demonstrate your skills, knowledge and understanding through discussing the evidence and showing how it meets the requirements of the qualification. The assessor will guide the discussion by using open questioning, active listening and knowledge of the requirements of the assessment criteria.

Witness statements/testimonies

Witness testimonies can be used as evidence of your performance. Such testimonies can be made verbally to the assessor or can be written in a short note.

If a witness provides a written statement they need to include the following information:
- your name
- the date, time and venue of the activity carried out
- a description of the activities you performed
- the date of writing the testimony
- a description of the witness' relationship to you
- their signature and job title
- their contact details (such as telephone number).

It is not appropriate for witness testimonies to contain a list of the skills to which they relate. Witnesses must direct the information in their testimonies to describing what you did. The assessor will then judge whether the activities demonstrate competence. It is not acceptable for you to produce written witness testimonies for witnesses to sign.

Simulation

Sometimes it is not possible to do the activities that are set down in the assessment criteria. For example the assessment criteria may state that you need to evacuate a burning building. It may be that you never have to do this activity in real life. So for these types of activities simulation may be used.

Your assessor will know which assessment criteria can be evidenced simulation.

Examples of where simulation may be used include:
- where performance is critical but events occur infrequently and yet a high degree of confidence is needed that you would act appropriately
- where performance is critical, happens frequently but where there is risk of harm to you in a real situation
- as a supplementary form of evidence.

Where simulations are used they must replicate working activities in a realistic workplace environment.

Copyright and plagiarism

Assessors must be confident that the work they mark is your own work. This does not mean that you must be supervised throughout the completion of all work but the assessor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of your work.

Students must not plagiarise. Plagiarism is the submission of another's work as one's own and/or failure to acknowledge the source correctly. Plagiarism is considered to be malpractice and could lead to you being disqualified. It is therefore important you understand that work you submit must be your own. You may refer to research, quotations or evidence but you must list your sources.

YOUR PORTFOLIO

We have looked at the different types of evidence you might produce for your qualification. In this section we will look at how you should record your evidence.

The portfolio

A portfolio is a well-organised collection of your evidence for your qualification. It can be any shape or size, depending on the type of evidence you want to have assessed. It can be paper based or in an electronic format.

Your centre will help you to decide which will be the best option for you when you start your qualification.

The portfolio belongs to you and it is your responsibility to keep it safe and secure. If the portfolio is lost or damaged you may have to reproduce some evidence, which may delay your progress towards your qualification. Your centre may arrange to store the portfolio for you if you decide this is the best way to keep it safe.

Sometimes your centre will need to store the portfolio so it can be checked by the internal and external verifiers. When you have completed your portfolio, the centre will usually keep it until the external verifier has visited. The portfolio will then be returned to you.

Building a portfolio

It is your responsibility to collect your evidence and build a portfolio. Although your centre will help you to do this, it is up to you to make sure you agree a way of organising evidence that you are happy with.

Your portfolio must show how the evidence you have collected covers the standards. It should be clearly logged and referenced, so that your assessor and verifiers can check it easily. You must show you have covered all of the learning outcomes, assessment criteria and evidence requirements in the qualification units.

We recommend that you use a simple referencing system for your evidence. You will often find that one piece of evidence can be used for more than one unit. In these cases, you should clearly cross-reference the evidence to the units and elements it covers, indicating specific assessment criteria.

There may be some evidence that you cannot put into your portfolio because it is too bulky, or because it is confidential. In these cases, you should make a note in your portfolio to explain where the evidence can be found.

Portfolio contents

Whether you have an electronic or paper-based portfolio, it will need to contain the following information:

Introductory section:
- your personal and contact details
- your centre contact details
- the name and scheme code of your qualification
- your OCR candidate number (you get this when the centre registers you with OCR for this qualification)
- your curriculum vitae, job description or personal statement
- names and contact details of staff involved in assessing and verifying your qualification
- names and contact details of witnesses.

Assessment section:
- a summary of your achievements
- an evidence log or locator to reference your evidence to the standards
- your assessment plans and reviews including
    - your assessment feedback
    - assessment decisions.

Evidence section:
- index of evidence
- your pieces of evidence
- evidence assessment records such as records of observations and professional discussions
- records of questions and your answers
- unit progress and sign off record.

Recording forms

There is a set of OCR Recording Forms you can use to help you build your portfolio. Your centre has access to these on the OCR website.

www.ocr.org.uk/skillsforbusiness

JOB ROLES AND PROGRESSION

Customer Service roles can be diverse in nature, from those specifically dedicated to providing customer-facing service for organisations (such as working on a customer service desk), to those where customer service is an inherent aspect of the job role, such as a Dental Nurse or Postman.

The following list is designed to provide an example of the types of roles that necessitate good customer service skills. It is in no way intended to be an exhaustive list:

Level 2

Customer Service Agents
Customer Service and Sales Representatives
Reception Desk Administrators (Hotel, Leisure Centre, Solicitors etc)
Customer Service and Sales Desk Assistants
Call Centre Operators
Shipping Clerks
Helpdesk Assistants
Customer Service Operatives
Waiter/Bar Tender
Sales Assistant/Personal Shopper
Courier
Hairdresser/Beautician
Benefits Adviser
Housing Warden
Community Police Officer (patrol and front desk)
Transport Worker (ticket office, travel adviser)
Dental Nurse
Bus Driver
Postman
Travel Agent

Level 3

Sales Team Supervisor
Customer Service Team Leader
PR Assistant
Marketing Executive
Senior Sales Assistant
Department Manager
Buyer/Merchandiser
Manager (restaurant, bar, retail, office, warehouse)

LEVEL 3 NVQ DIPLOMA IN CUSTOMER SERVICE

To achieve this qualification, candidates must achieve a total of 42 credits made up as follows:

• from mandatory Group A, candidates must achieve 12 credits

• from the optional groups, candidates must achieve 30 credits by completing a minimum of one unit from each optional group, of which a minimum 10 credits must be achieved at Level 3.

The following table contains the groups of mandatory and optional units:

GROUP A MANDATORY UNITS (12 CREDITS)

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
F3	K/601/1622	Demonstrate understanding of customer service	6	3
F4	J/601/1627	Demonstrate understanding of the rules that impact on improvements in customer service	6	3

GROUP B OPTIONAL UNITS - IMPRESSION AND IMAGE

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
A3	R/601/1212	Communicate effectively with customers	5	2
A4	L/601/0933	Give customers a positive impression of yourself and your organisation	5	2
A5	D/601/0936	Promote additional services or products to customers	6	2
A6	H/601/1215	Process information about customers	5	2
A7	M/601/1217	Live up to the customer service promise	6	2
A8	T/601/1218	Make customer service personal	6	2
A9	M/601/1220	Go the extra mile in customer service	6	2
A10	T/601/1221	Deal with customers face to face	5	2
A11	F/601/1223	Deal with incoming telephone calls from customers	5	2
A12	J/601/1224	Make telephone calls to customers	6	2
A13	R/601/1226	Deal with customers in writing or electronically	6	3
A14	D/601/1228	Use customer service as a competitive tool	8	3
A15	D/601/1231	Organise the promotion of additional services or products to customers	7	3

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
A16	K/601/1233	Build a customer service knowledge set	7	3
A17	T/601/1235	Champion customer service	10	4
A18	F/601/1237	Make customer service environmentally friendly and sustainable	11	4

GROUP C OPTIONAL UNITS - DELIVERY

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
B2	J/601/1210	Deliver reliable customer service	5	2
B3	Y/601/1213	Deliver customer service on your customer's premises	5	2
B4	K/601/1216	Recognise diversity when delivering customer service	5	2
B5	A/601/1219	Deal with customers across a language divide	8	2
B6	A/601/1222	Use questioning techniques when delivering customer service	4	2
B7	L/601/1225	Deal with customers using bespoke software	5	2
B8	Y/601/1227	Maintain customer service through effective handover	4	2
B9	H/601/1229	Deliver customer service using service partnerships	6	3
B10	Y/601/1230	Organise the delivery of reliable customer service	6	3
B11	H/601/1232	Improve the customer relationship	7	3
B12	M/601/1234	Maintain and develop a healthy and safe customer service environment	8	4
B13	A/601/1236	Plan, organise and control customer service operations	10	4
B14	J/601/1238	Review the quality of customer service	8	4
B15	L/601/1239	Build and maintain effective customer relations	8	4
B16	F/601/1240	Deliver seamless customer service with a team	8	4

GROUP D OPTIONAL UNITS - HANDLING PROBLEMS

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
C3	M/601/1511	Resolve customer service problems	6	2
C4	T/601/1512	Deliver customer service to difficult customers	6	2
C5	J/601/1515	Monitor and solve customer service problems	6	3

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
C6	D/601/1519	Apply risk assessment to customer service	10	3
C7	D/601/1522	Process customer service complaints	6	3
C8	K/601/1524	Handle referred customer complaints	10	4

GROUP E OPTIONAL UNITS - DEVELOPMENT AND IMPROVEMENT

UNIT NO	UNIT ACCREDITATION NUMBER	UNIT TITLE	CREDIT VALUE	LEVEL
D1	T/601/1526	Develop customer relationships	6	2
D2	A/601/1530	Support customer service improvements	5	2
D3	R/601/1534	Develop personal performance through delivering customer service	6	2
D4	H/601/1540	Support customers using on-line customer services	5	2
D5	M/601/1542	Buddy a colleague to develop their customer service skills	5	2
D6	R/601/1548	Develop your own customer service skills through self-study	6	2
D7	Y/601/1549	Support customers using self-service technology	5	2
D8	D/601/1553	Work with others to improve customer service	8	3
D9	H/601/1554	Promote continuous improvement	7	3
D10	K/601/1555	Develop your own and others' customer service skills	8	3
D11	H/601/1568	Lead a team to improve customer service	7	3
D12	H/601/1571	Gather, analyse and interpret customer feedback	10	3
D13	T/601/1574	Monitor the quality of customer service transactions	7	3
D14	L/601/1578	Implement quality improvements to customer service	10	4
D15	L/601/1581	Plan and organise the development of customer service staff	9	4
D16	M/601/1587	Develop a customer service strategy for a part of an organisation	11	4
D17	A/601/1592	Manage a customer service award programme	7	4
D18	Y/601/1597	Apply technology to other resources to improve customer service	11	4
D19	R/601/1601	Review and re-engineer customer service processes	11	4
D20	K/601/1605	Manage customer service performance	7	4

UNIT F3 (K/601/1622)

DEMONSTRATE UNDERSTANDING OF CUSTOMER SERVICE

THIS IS A MANDATORY UNIT

This unit requires you to understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job role.

The unit is divided into three outcomes:

1. Follow your organisation's accepted customer service language
2. Apply customer service principles in your customer service role
3. Understand principles of customer service.

UNIT F3 (K/601/1622)

DEMONSTRATE UNDERSTANDING OF CUSTOMER SERVICE

Learning Outcome 1 - Follow your organisation's accepted customer service language

Assessment criteria. I can:
1.1. Communicate to customers my organisation's service offer, how it balances organisational and customer needs and how it meets customer expectations
1.2 Compare the service offers of commercial, public sector and third sector organisations and how they each meet customer expectations
1.3 Discuss with colleagues steps that team members can take to deal with different customers and different customer service situations.

Learning Outcome 2 - Apply customer service principles in your customer service role

Assessment criteria. I can:
2.1 Follow the key policies and procedures in your organisation for the delivery of services or products
2.2 Demonstrate how my organisation's service approach and service offer fit within my own industry and differ from those of other industries
2.3 Discuss with colleagues how our organisation's ethical and value base fits with organisational needs and customer expectations.

ACTIVITY

Carry out research to compare the approach to customer service of different industries, and that of commercial, public sector and third sector organisations. Identify what factors cause them to differ in approach.

Learning outcome 3 - Understand principles of customer service

Assessment criteria. I can:

3.1   Describe how my organisation's service offer meets customer expectations

3.2   Explain how my organisation's service offer is affected by financial and other resource limitations

3.3   Identify the impact that my organisation's service offer may have on different people in the service chain

3.4   Explain how customers form their expectations of the services or products

3.5   Explain the importance of effective teamwork for the delivery of excellent customer service

3.6   Describe how customer service can contribute to best value in a public sector or third sector organisation

3.7   Explain how customer service can provide a competitive advantage for a commercial organisation

3.8   Describe why my organisation must limit the customer service it gives to balance customer satisfaction with organisational goals

3.9   Explain how to deal with different customer behaviours and personalities to achieve customer satisfaction

3.10 Explain the importance of effective communication in the delivery of excellent customer service

3.11 Describe how I ensure my communication with diverse groups of customers is effective and efficient

3.12 Describe the importance of continuous improvement within customer service

3.13 Explain the key policies and procedures in my organisation for the delivery of services or products and why it is important to follow them

3.14 Explain how my industry's approach to customer service differs from the approach of another industry

3.15 Outline the service offer of competitors of my organisation or any organisations offering similar services or products

3.16 Describe the features and benefits of my organisation's services or products that influence customer service delivery and customer satisfaction

3.17 Explain how my organisation balances its needs with customer expectations and needs

3.18 Justify the ethical and value base of my organisation's approach to customer service

3.19 Explain how my behaviour when improving customer service delivery affects the success of any changes to customer expectations and needs.

DID YOU KNOW?

A customer is anyone who buys or benefits from the service or product you supply, whereas a consumer is the person who will use the product or service. Children are consumers of toys, whereas their parents are usually the customers.

Key terms

Customers
A customer is anyone who benefits from the product or service you provide. They can be internal customers working within your organisation or external customers. You may provide products or services to the public (B2C Business to customer) or to another organisation (B2B Business to business).

Customer service language
Each organisation or industry has a language they use to explain their service to customers. It requires knowledge of the customers' needs and expectations and a good understanding of the key messages used to explain the organisation's product and services. There is an appropriate language to use when discussing customers with colleagues.
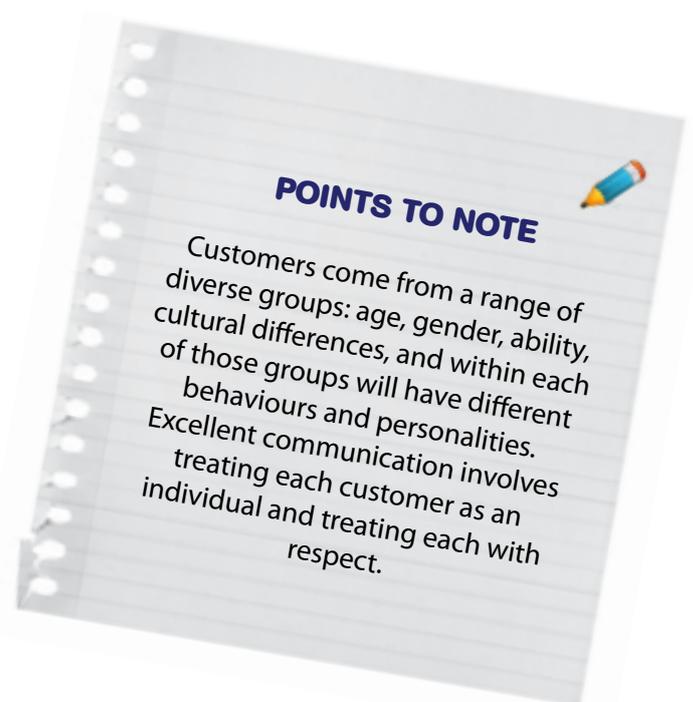
Policies and procedures
These are written down and must be followed to ensure consistent customer service throughout the organisation. They embody the values and ethics of the organisation. They define how the organisation fits within the industry and how it differs from any competitor's customer service offer.

Limitations
Know your limits and do not over-promise on customer service. There may not be sufficient finances, human or other resources to deliver your promise. It is better to under-promise and over-deliver.

Teamwork and the customer service chain
Customer service is never delivered by one person alone. A chain of individuals and service partners are involved in delivering excellent customer service.

POINTS TO NOTE

Customers come from a range of diverse groups: age, gender, ability, cultural differences, and within each of those groups will have different behaviours and personalities. Excellent communication involves treating each customer as an individual and treating each with respect.

UNIT F4 (J/601/1627)
DEMONSTRATE UNDERSTANDING OF THE RULES THAT IMPACT ON IMPROVEMENTS IN CUSTOMER SERVICE

THIS IS A MANDATORY UNIT

This unit requires you to understand all the rules that apply to customer service delivered by your organisation and how they apply to your job role.

The unit is divided into three outcomes:

1. Demonstrate an understanding of the organisational rules and procedures that impact on customer service improvements
2. Demonstrate an understanding of the legislation and external regulation that impact on customer service improvements
3. Understand the rules that impact on improvements in customer service.

UNIT F4 (J/601/1627)

DEMONSTRATE UNDERSTANDING OF THE RULES THAT IMPACT ON IMPROVEMENTS IN CUSTOMER SERVICE

Learning outcome 1 - Demonstrate an understanding of the organisational rules and procedures that impact on customer service improvements
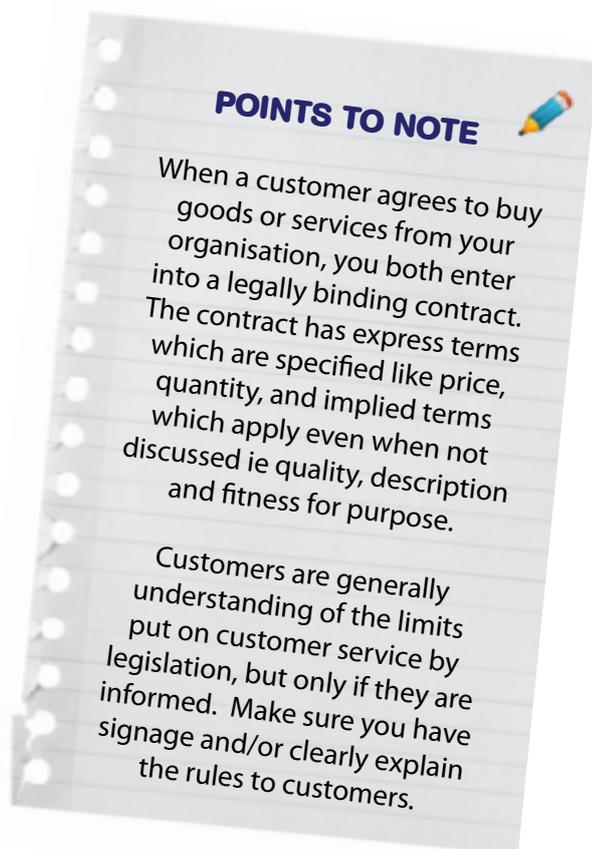
Assessment criteria. I can:
1.1   Identify organisational policies, procedures and practices that may impact on proposed improvements in customer service
1.2   Identify procedures and actions needed to gain approval for proposed improvements in customer service
1.3   Agree with colleagues or service partners the actions needed to meet organisational requirements when implementing proposed customer service improvements.

Learning outcome 2 - Demonstrate an understanding of the legislation and external regulation that impact on customer service improvements

Assessment criteria. I can:
2.1   Identify relevant customer related legislation and external legislation that may affect the implementation of customer service improvements
2.2   Identify relevant general business legislation and external regulation that may affect the implementation of customer service improvements
2.3   Balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service improvements.

POINTS TO NOTE

When a customer agrees to buy goods or services from your organisation, you both enter into a legally binding contract. The contract has express terms which are specified like price, quantity, and implied terms which apply even when not discussed ie quality, description and fitness for purpose.

Customers are generally understanding of the limits put on customer service by legislation, but only if they are informed. Make sure you have signage and/or clearly explain the rules to customers.

ACTIVITY

List your industry regulations that may impact on customer service.

DEMONSTRATE UNDERSTANDING OF THE RULES THAT IMPACT ON IMPROVEMENTS IN CUSTOMER SERVICE

Learning outcome 3 - Understand the rules that impact on improvements in customer service

Assessment criteria. I can:

3.1   Describe organisational policies, procedures and practices that I need to take into account when I propose improvements in customer service

3.2   Explain how to gain approval to change customer service procedures or practices

3.3   State the limits of my own authority and who else in the organisation needs to be involved if I cannot authorise improvements alone

3.4   Explain how I would involve colleagues or service partners in the implementation of improvements

3.5   Explain relevant legislation and external regulation relating to consumer protection

3.6   Explain relevant legislation and external regulation relating to data protection

3.7   Explain relevant legislation and external regulation relating to disability discrimination and equal opportunities

3.8   Explain relevant legislation and external regulation relating to diversity, inclusion and discrimination for reasons other than disability or equal opportunities

3.9   Explain relevant legislation and external regulation relating to health and safety of customers and colleagues

3.10   Compare the need to balance the requirements of legislation and external regulation with the needs and objectives of my organisation

3.11   Explain legislation and external regulation that affect customer service in my industry in particular

Key terms

Customer service improvements
Customers will make enquiries and express expectations of a level of customer service. It is a key aspect of excellent customer service to accommodate these needs and exceed customer expectations. However, there are certain organisational rules and legislation in place that may limit what you can offer the customer.

Organisational policies and procedures
It is important not just to know and follow organisational procedures but to understand why they are there. A policy of always having someone on reception may limit the assistance offered to a visitor carrying packages to their car but the policy may exist to ensure organisational security and consistency of service to all visitors.

Proposing and implementing improvements
If you have an idea for improving customer service, you need to know who makes the decisions and the channels for taking your proposal forward. Once implemented, all parties need to know about improvements, so good communication and agreement is needed from colleagues and service partners.

Legislation and industry regulations
Any improvements must meet the requirements of legislation. This includes Health & Safety, Data Protection, Equality and Diversity, Consumer Protection legislation. There may be additional guidelines that apply to your particular industry.

DID YOU KNOW?
Any organisation that does not comply with relevant legislation may be liable under civil or criminal law. If clear procedures are in place and employee training delivered, then the individual employee could go to court.

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