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Unit Title:	Plan and organise the development of customer service staff
OCR unit number	D15
Level:	4
Credit value:	9
Guided learning hours:	60

Unit purpose and aim

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it. To be effective, organisations need to review constantly how effective their customer service is and what improvements should be made. Sometimes customer service improvements will depend on the development of staff skills. New staff must be brought to the required standards of skills and knowledge and established staff need to be updated on new procedures and techniques or refreshed on existing ones. Senior customer service staff have an important contribution to make to this process. This unit is about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will: 1. identify customer service staff development and training needs	**The Learner can:** 1.1 identify where customer service could be improved through staff training and development 1.2 help staff providing customer service to identify their own development and training needs 1.3 help staff to identify how they learn best 1.4 agree the types of staff development and training activities that are needed 1.5 report staff development needs to relevant people in your organisation	Candidates should have an understanding of: The strategy, policies and procedures of their organisation relating to the delivery of services and products to customers. Their organisation's policies and procedures relating to customer service staff training and development. How to review individual training and development needs with members of staff in their organisation, helping them to identify these and their preferred methods of learning. How to agree and report staff development to relevant people in their organisation.

2. organise customer service development and training	2.1	agree the aims and objectives of the customer service development and training activities	Candidates should have an understanding of: Their organisation's policies and procedures relating to customer service staff training and development.
	2.2	agree the type and style of customer service development and training that are appropriate	
	2.3	agree the detailed design of customer service development and training activities	Their own authority to agree aims and objectives of customer service development and training activities.
	2.4	organise customer service development and training activities	How to agree detailed design of customer service development and training activities, taking identified preferred types and styles into consideration.
	2.5	monitor the performance of staff involved in the development and training activities to be sure that learning is put into practice	Types of customer service development and training activities available and how to organise agreed activities within their organisation.
	2.6	organise additional help and training for staff where this is needed	
			Methods of monitoring performance of staff involved in development and training activities.
			How to organise additional help and training when needed for specific staff.
3. understand how to plan and organise the development of customer service staff	3.1	explain the importance of continuously developing staff that provide customer service	Candidates should have an understanding of: Their organisation's policies and procedures relating to customer service staff training and development.
	3.2	describe current objectives and targets that relate to customer service in their area of responsibility	
	3.3	identify when development and training could improve customer service performance	Their own authority to agree aims and objectives of customer service development and training activities.
	3.4	describe the range of types and styles of development and training	How to identify when development and training could improve customer service

		and how to select those that are appropriate to customer service, their organisation, and specific training and development needs	performance. The range of types and styles of development and training available and how to select those appropriate to customer service delivery in their organisation and specific organisational or staff needs.
	3.5	explain why it is important that they should have an input into the design and delivery of customer service development and training for their staff	Candidates must be able to explain: The importance of continuing staff development in customer service delivery in their organisation.
	3.6	describe how they can help staff to put into practice what they have learned	Current objectives and targets relating to customer service in their area of responsibility.
	3.7	explain how to assess the impact that development and training has had on customer service performance	Why it is important that they should have input into the design and delivery of development and training activities for their staff.
	3.8	describe the types of additional support they could provide to staff following development and training	How they can assist staff put into practice what they have learned as a result of these activities and the type of additional support they could provide to staff where required. How to assess the impact of development and training on customer service performance.

Assessment

Specified in the Customer Service Assessment Strategy 2010

Evidence requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2. You may collect the evidence for the Unit through work in a private sector organisation, a not‑for‑profit organisation or a public services organisation.

3. You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.

4. Your evidence must show that you have been involved with the training and development of staff from two of the following groups:

- new staff

- existing staff

- front‑line staff

- supervisors and team leaders

- part‑time staff

- support staff

- service partners.

5. You must show that you monitor the performance of staff involved in development and training activities through:

- formal monitoring mechanisms such as appraisals and Key Performance Indicators (KPIs)

- informal and more immediate monitoring such as direct supervision.

Guidance on assessment and evidence requirements

Please refer to the OCR Customer Service Centre Handbook available from the OCR website: **www.ocr.org.uk**

National Occupational Standards (NOS) mapping/signposting

This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document *'Admin Guide: Vocational Qualifications' (A850)* on the OCR website **www.ocr.org.uk**