

<b>Unit Title:</b>	<b>Buddy a colleague to develop their customer service skills</b>
Unit number	D5
Level:	2
Credit value:	5
Guided learning hours:	33

## Unit purpose and aim

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If someone is asked to buddy a colleague who is learning customer service aspects of their job, they will need to approach that responsibility in an organised way. This unit is about how to be a good buddy by working alongside their colleague and providing them with constructive feedback and support. Someone does not need to be more senior than their colleague or their supervisor to act as a customer service buddy.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Plan and prepare to buddy a colleague</p>	<p><b>The Learner can:</b></p> <p>1.1 Agree with their colleague aspects of the colleague's work which may benefit most from their buddying support</p> <p>1.2 Confirm their understanding of their colleague's job tasks and responsibilities using reliable sources</p> <p>1.3 Clarify the customer service image and impression their colleague should present in their job</p> <p>1.4 Arrange times when it will be most helpful to work alongside their colleague</p> <p>1.5 Plan details of a buddy session to support their colleague on the job</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to buddy a colleague including: <ul style="list-style-type: none"> <li>- Understanding the tasks and responsibilities of the colleague</li> <li>- Where the colleague may benefit from their support</li> <li>- How to help them promote a positive image to the customers</li> <li>- Timescales for support</li> <li>- Content of support sessions</li> </ul> </li> </ul>
<p>2 Support their buddy colleague on the job</p>	<p>2.1 Agree with their colleague where they will be placed near them when buddying them on the job</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to support their colleague by: <ul style="list-style-type: none"> <li>- Agreeing their location in relation to the colleague</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>2.2 Ensure their presence when their buddy is dealing with customers does not detract from effective customer service</p> <p>2.3 Carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow</p> <p>2.4 Observe their colleague closely to identify what they do well and areas in which they could improve</p> <p>2.5 Discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement</p> <p>2.6 Praise their colleague on aspects of work which they have carried out well</p> <p>2.7 Explain to their colleague ways in which they can improve their customer service performance</p> <p>2.8 Make notes on their colleague's strengths and areas for development that they can discuss with their colleague</p>	<ul style="list-style-type: none"> <li>- Carry out the customer service role for the colleague to observe</li> <li>- Carry out observations of their colleague</li> <li>- Provide verbal feedback at appropriate times with the colleague to aid development whilst carrying out the role</li> <li>- Document feedback to colleagues to discuss at the end of the session</li> </ul> <ul style="list-style-type: none"> <li>• Candidates must also have an understanding of how to give feedback to others</li> </ul>
<p>3 Provide buddy support off the job</p>	<p>3.1 Arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers</p> <p>3.2 Identify areas of general interest that help to establish rapport with their buddy colleague</p> <p>3.3 Use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance</p> <p>3.4 Agree actions their buddy colleague can take to improve their customer service performance</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to support their colleague when they are "off the job" to include: <ul style="list-style-type: none"> <li>- Arranging suitable times for discussion</li> <li>- Establish a rapport</li> <li>- Use of feedback notes during discussions</li> <li>- Agree actions to improve performance</li> <li>- Offer hints and tips from own experience</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.5 Offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience	
4 Understand how to buddy a colleague to develop their customer service skills	4.1 Identify the tasks in their buddy colleague's job 4.2 Identify areas of the job that benefit most from buddying support 4.3 Describe the customer service image and impression that should be presented in their buddy colleague's job 4.4 Identify the best times at which to work alongside their buddy colleague 4.5 Identify ways to work alongside their buddy colleague without intruding on the customer relationship 4.6 Describe techniques for giving positive feedback and constructive criticism to their buddy colleague 4.7 Explain the importance of establishing an effective rapport with their buddy colleague 4.8 Review options for actions their buddy colleague can take to improve their customer service performance	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• The tasks carried out by their colleague</li> <li>• Areas for development</li> <li>• The customer service image and impression required to do the job effectively</li> <li>• Appropriate timescales and locations for support both on the job and off the job</li> <li>• How to provide feedback, positive and negative</li> <li>• The importance of establishing a rapport with the colleague</li> <li>• Options available to the colleague for developing their performance</li> </ul>

## Assessment

---

This qualification is internally assessed by centre staff and externally verified by OCR Assessors.

## 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. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook which can be downloaded from the OCR website: [www.ocr.org.uk](http://www.ocr.org.uk)*).
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 with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of buddying a colleague to develop their customer service skills:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job
  - d when people, systems or resources have let you down

## Guidance on assessment and evidence requirements

---

Please refer to the OCR Customer Service Centre Handbook available from the OCR website [www.ocr.org.uk](http://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](http://www.ocr.org.uk)