

Customer Service

09628 Level 2 Certificate in Principles of Customer Service

09629 Level 3 Certificate in Principles of Customer Service

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1 Introduction

This centre handbook provides information for centre staff involved in the planning, delivery and assessment of the following qualifications which have been accredited onto the Qualifications and Credit Framework (QCF):

OCR Level 2 Certificate in Principles of Customer Service. The OCR scheme code for this qualification is 09628.

OCR Level 3 Certificate in Principles of Customer Service. The OCR scheme code for this qualification is 09629.

It is important that centre staff involved in the delivery of the above qualifications understand the requirements laid down in this handbook. Centres should therefore ensure that all staff involved in the delivery of these qualifications have access to this document.

1.1 The OCR Principles of Customer Service suite of qualifications

The OCR Principles of 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 gain underpinning knowledge and understanding in the customer service sector. They support achievement of Functional Skills and relate to national occupational standards (NOS).

The awarding body for these qualifications is Oxford Cambridge and RSA Examinations (OCR) and the regulatory body is the Office of Qualifications and Examinations Regulation (Ofqual).

These qualifications have been accredited onto the Qualifications and Credit Framework (QCF). They are endorsed as the technical element in the Level 2 and Level 3 Customer Service Apprenticeship Frameworks by the Council for Administration, the sector body for customer service.

1.2 Administration arrangements for these qualifications

A separate publication, the *Admin guide: Vocational Qualifications (A850)*, provides details of the administration arrangements for these qualifications. The Admin Guide is available to download from our website: www.ocr.org.uk.

1.3 What is the Qualifications and Credit Framework (QCF)?

The QCF is a unit and credit-based regulatory framework which replaces the National Qualifications Framework (NQF). It is a way of recognising skills and qualifications by awarding credit for qualifications and units achieved.

1.4 If centre staff have queries

This Centre Handbook and the Admin Guide contain all the information needed to deliver and administer these qualifications. If centre staff have any queries about these qualifications that are not answered in these publications, they should refer to the section [Further support and information](#) for details of who to contact. Support is also available on the OCR website for these qualifications.

1.5 Documentation updates

The information provided in this handbook was correct at the time of production. Occasionally OCR may update this information. Please refer to the qualification website at www.ocr.org.uk for details regarding updates to these qualifications. The latest version of this handbook is available to download from the OCR website.

2 General Information

2.1 Qualification profile

Title	OCR Level 2 Certificate in Principles of Customer Service			
OCR code	09628			
QAN	600/0840/4			
Level	This qualification has been accredited on to the Qualifications and Credit Framework (QCF) at Level 2			
Qualification structure	The credit required for this qualification is 13. To achieve this qualification, candidates must complete a total of 13 credits from 3 mandatory units.			
Age group approved	Pre-16	16-18	18+	19+
		✓	✓	✓
This qualification is suitable for	<p>This qualification is suitable for those who are:</p> <ul style="list-style-type: none"> • preparing for employment in a job that involves customer service • starting work in a job that involves customer service and wishing to learn essential knowledge, understanding and skills at the same time as learning the job • already experienced in a job involving customer service and wishing to update their knowledge, understanding and skills in order to improve their customer service performance • returning to work or changing their job role to one which involves customer service • embarking on an Apprenticeship in Customer Service. 			
Entry requirements	There are no formal entry requirements for this qualification.			
Assessment	<p>These qualifications are pass/fail.</p> <p>These qualifications are internally assessed by centre staff (e.g. teachers/tutors, support workers, carers, assessors) and externally moderated by OCR.</p>			
Funding	<p>For details on eligibility for public funding please refer to the following websites:</p> <p>http://www.dcsf.gov.uk/section96/</p> <p>http://skillsfundingagency.bis.gov.uk/</p>			
Performance figures	<p>For information on this qualification's contribution to performance measurement please see the Ofqual's National Database of Accredited Qualifications (NDAQ): http://www.accreditedqualifications.org.uk</p>			
Last entry date*	31/12/2016			
Last certification date*	31/12/2017			

*OCR will inform centres of changes to these dates. Please refer to our website www.ocr.org.uk for current dates. All centre records must be updated accordingly.

2.2 Qualification profile

Title	OCR Level 3 Certificate in Principles of Customer Service			
OCR code	09629			
QAN	600/0752/7			
Level	This qualification has been accredited on to the Qualifications and Credit Framework (QCF) at Level 3			
Qualification structure	The credit required for this qualification is 17. To achieve this qualification, candidates must complete a total of 17 credits from 3 mandatory units.			
Age group approved	Pre-16	16-18	18+	19+
		✓	✓	✓
This qualification is suitable for	<p>The qualification is suitable for those who:</p> <ul style="list-style-type: none"> • are already experienced in a job involving customer service and wish to update their knowledge, understanding and skills to improve their customer service performance • wish to develop their full potential and/or the potential of others to deliver and improve customer service • are seeking career progression through jobs involving customer service • are undertaking or preparing to undertake the Level 3 NVQ Diploma in Customer Service • wish to add to their personal portfolio of qualifications for acceptance on to other courses • are embarking on an Apprenticeship in Customer Service <p>It will also be suitable for those preparing for employment in job roles where they will be expected to carry out activities with a significant customer service focus.</p>			
Entry requirements	There are no formal entry requirements for this qualification.			
Assessment	<p>These qualifications are pass/fail.</p> <p>These qualifications are internally assessed by centre staff (e.g. teachers/tutors, support workers, carers, assessors) and externally moderated by OCR.</p>			
Funding	<p>For details on eligibility for public funding please refer to the following websites:</p> <p>http://www.dcsf.gov.uk/section96/</p> <p>http://skillsfundingagency.bis.gov.uk/</p>			
Performance figures	<p>For information on this qualification's contribution to performance measurement please see the Ofqual's National Database of Accredited Qualifications (NDAQ): http://www.accreditedqualifications.org.uk</p>			
Last entry date*	31/12/2016			
Last certification date*	31/08/2017			

*OCR will inform centres of changes to these dates. Please refer to our website www.ocr.org.uk for current dates. All centre records must be updated accordingly

2.3 Target market

The OCR Level 2 Certificate in Principles of Customer Service will be appropriate for those who are:

- preparing for employment in a job that involves customer service
- starting work in a job that involves customer service and wishing to learn essential knowledge, understanding and skills at the same time as learning the job
- already experienced in a job involving customer service and wishing to update their knowledge, understanding and skills in order to improve their customer service performance
- returning to work or changing their job role to one which involves customer service
- embarking on an Apprenticeship in Customer Service.

The Level 3 Certificate in Principles of Customer Service will be appropriate for those who:

- are already experienced in a job involving customer service and wish to update their knowledge, understanding and skills to improve their customer service performance
- wish to develop their full potential and/or the potential of others to deliver and improve customer service
- are seeking career progression through jobs involving customer service
- are undertaking or preparing to undertake the Level 3 NVQ Diploma in Customer Service
- wish to add to their personal portfolio of qualifications for acceptance on to other courses
- are embarking on an Apprenticeship in Customer Service

It will also be suitable for those preparing for employment in job roles where they will be expected to carry out activities with a significant customer service focus.

2.4 Qualification aims

The **OCR Level 2 Certificate in Principles of Customer Service** qualification underpins the full breadth of essential knowledge and understanding which would be needed by a competent employee functioning in a customer service role. It also provides accreditation for the interpersonal skills identified as critical for anyone working, or intending to work, within a customer service environment whether their work involves direct or indirect contact with external or internal customers. The qualification meets the requirements for the technical element required in the Level 2 Apprenticeship framework in customer service and is a test of the essential knowledge underpinning units in the Level 2 NVQ Certificate in Customer Service.

The **OCR Level 3 Certificate in Principles of Customer Service** recognises candidates' understanding of customer service when dealing with more complex and non-routine customer service issues. The qualification underpins the full breadth of essential knowledge and understanding that would be needed by a competent employee functioning in a customer service role.

It also provides accreditation for the interpersonal skills identified as critical for anyone working, or intending to work, within a customer service environment whether their work involves direct or indirect contact with external or internal customers. The qualification meets the requirements for the technical element required in the Level 3 Apprenticeship framework in customer service and is a test of the essential knowledge underpinning units in the Level 3 NVQ Diploma in Customer Service.

2.5 Entry requirements

These qualifications are available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that restrict access or progression thereby promoting equal opportunities.

All centre staff involved in the assessment or delivery of these qualifications should understand the requirements of the qualification and match them to the needs and capabilities of individual candidates before entering them as candidates for one of these qualifications.

There are no formal requirements for entry to these qualifications. Candidates will be expected to have a standard of literacy and numeracy and a level of industry knowledge appropriate for a person working at either Level 2 or Level 3.

2.6 Unique Learner Number (ULN)

It is an Ofqual requirement that Awarding Bodies must capture the Unique Learner Number (ULN) for all candidates who have claimed certification for Customer Service Knowledge. Where a candidate has a ULN, you should enter their number in the ULN field of the entry form. For candidates who do not have a ULN, a claim will still be accepted if you leave this field blank but OCR will not be able to send these achievements to the Diploma Aggregation Service. Further information about this can be found in the *Admin guide: Vocational Qualifications (A850)* available to download from www.ocr.org.uk.

2.7 Progression opportunities

These qualifications will be recognised as the Technical element within the context of the Council of Administration Apprenticeship Frameworks.

They will also provide a way into a recognised customer service occupational qualification for those not in full-time employment.

Candidates for the Level 2 Certificate can progress to the NVQ Certificate in Customer Service at Level 2 or to the Level 3 Certificate in Principles of Customer Service . Candidates for the Level 3 Certificate can progress to the NVQ Diploma in Customer Service at Level 3.

2.8 Supporting OCR candidates

Centres should ensure that candidates are informed of the title and level of the qualification they have been entered for and that Oxford Cambridge and RSA Examinations (OCR) is the awarding body for their chosen qualification.

Centre staff should provide guidance to candidates on the assessment process and help candidates prepare for assessment. Full details on how the units are assessed are in sections 3 and 6 of this centre handbook.

2.9 Wider issues

These qualifications provide potential for centres to develop candidates' understanding of spiritual, moral, ethical, social and cultural issues and heighten candidates' awareness of environmental issues, health and safety considerations and European developments.

Spiritual, moral, ethical, social and cultural issues

Centre staff delivering a course that supports these qualifications would have opportunities to address ethical, social, cultural and moral issues in some of the units, for example:

- candidates will need to understand issues such as individual responsibility, group/team responsibility, business' and social responsibilities
- explore the individual's responsibility towards the customer, courtesy and protocols when dealing with colleagues and customers
- confidentiality of information (employer and customers).

Environmental issues, health and safety considerations and European developments

Centre staff delivering a course that supports these qualifications may have opportunities to address environmental issues, health and safety considerations and European developments depending on the method of delivery/choice of teaching materials.

2.10 Guided learning hours

Each of the units in these qualifications are allocated a number of guided learning hours (glh) which indicates the approximate number of hours for teacher supervised or directed study time and assessment. Information on unit glh for this qualification is given in section 6.

2.11 Funding

These qualifications are accredited at Level 2 and 3 of the Qualifications and Credit Framework and are eligible for funding under Section 96 and/or Skills Funding Agency. For details on eligibility for public funding please refer to the following websites:

<http://www.dcsf.gov.uk/section96/>

<http://skillsfundingagency.bis.gov.uk/>

2.12 Mode of delivery

OCR does not specify the mode of study or specify a time limit for the achievement of these qualifications other than the expiry dates for entry and certification laid down by the regulatory authorities detailed in the qualification profiles.

Centres are free to deliver these qualifications using any mode of delivery that meets the needs of their candidates. Whatever mode of delivery is used, centres must ensure that candidates have appropriate access to the resources identified below.

Centres should consider the candidates' complete learning experience when designing learning programmes. This is particularly important in relation to candidates studying part time alongside real work commitments where candidates may bring with them a wealth of experience that should be utilised to maximum effect by centre staff.

2.13 Resources

OCR strongly advises that teaching and development of subject content and associated skills be referenced to real vocational situations, through the utilisation of appropriate work-based contact, vocationally experienced delivery personnel, and real life case studies.

Candidates should be encouraged to read around the subject and have an appropriate knowledge of the application of the appropriate legislation (e.g. Health and Safety).

In addition, each unit will contain guidance on the resources required. Staff conducting assessment must understand fully the requirements of these qualifications. Centres should ensure that appropriate physical resources are made available to candidates.

Centres will need to provide appropriate assessment facilities for candidates that comply with the regulations laid down by OCR in the *Admin guide: Vocational Qualifications (A850)* and the *JCQ Instructions for Conducting Examinations*, available on the OCR website www.ocr.org.uk.

Centres will need to meet the above requirements when they seek centre approval from OCR.

2.14 Delivery in Wales and Northern Ireland

The specification for these qualifications has only been approved by Ofqual for delivery in England/Wales/Northern Ireland during the life of the qualifications.

The specification for these qualifications has been approved by the Department for Children, Education, Lifelong Learning and Skills (DCELLS) for use by centres in Wales and/or by the Council for the Curriculum Examinations and Assessment (CCEA) for use by centres in Northern Ireland.

Candidates in Wales or Northern Ireland should not be disadvantaged by terms, legislation or aspects of government that are different from those in England. Where such situations might occur, including in the external assessment, the terms used have been selected as neutral so that candidates may apply whatever is appropriate to their own situation.

We will provide specifications, assessments and supporting documentation in English.

Further information concerning the provision of assessment materials in Welsh and Irish may be obtained from the OCR Customer Contact Centre: 024 76 851509.

2.15 Access arrangements and special consideration

Adjustments to standard assessment arrangements are made on the basis of the individual needs of candidates.

It is important, therefore, that centres identify as early as possible whether candidates have disabilities or particular difficulties that will put them at a disadvantage in the assessment situation and select an appropriate qualification or adjustment that will allow them to demonstrate attainment.

The responsibility for providing adjustments to assessment is one which is shared between OCR and the centre. Centre staff should consult the 'Joint Council of Qualifications' (JCQ) booklet *Access Arrangements, Reasonable Adjustments and Special Consideration* www.jcq.org.uk.

This document should also be referred to for those candidates who may require a post examination adjustment, special consideration (to reflect temporary illness, indisposition or injury), at the time of the examination/assessment.

For further guidance on access arrangements and special consideration please refer to OCR's *Admin guide: Vocational Qualifications (A850)* on the OCR website www.ocr.org.uk.

2.16 Results enquiries and appeals

Please refer to the *Admin guide: Vocational Qualifications (A850)* which can be downloaded from the OCR website www.ocr.org.uk.

2.17 Centre malpractice guidance

It is the responsibility of the Head of Centre* to report (in writing) all cases of suspected malpractice involving centre staff or candidates, to the OCR Standards Division.

When asked to do so by OCR, Heads of Centres are required to investigate instances of malpractice promptly, and report the outcomes to the OCR Standards Division.

2.18 Further information is contained in the JCQ publication:

Suspected Malpractice in Examinations and Assessments which is available from www.jcq.org.uk together with OCR's *Malpractice Procedures – A Guide for Centres*.

* The Head of Centre is defined as the most senior officer in the organisation, directly responsible for the delivery of OCR qualifications, eg the Principal of a College, the Head Teacher of a school, the Managing Director of a Private Training Provider or the Group Training Manager of a major company.

3 Assessment

3.1 Assessment: How it works

Each unit within these specifications is designed around the principle that candidates will produce a portfolio of evidence that meets all of the assessment criteria for that unit.

In order for candidates to be able 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 learning outcome and assessment criteria are fully addressed. The identified knowledge, understanding and skills in the unit are not exhaustive and may be expanded upon or tailored to particular contexts to which the unit is being taught and the assessment criteria applied.

We recommend that teaching and development of subject content and associated skills be referenced to real life situations, through the utilisation of appropriate work-based contact, vocationally experienced delivery personnel, and real life case situations.

When assessors are satisfied that the candidate has 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.

Centre assessed units

All units for these qualifications are centre-assessed and OCR-moderated. Centres will need to ensure that candidates meet all of the assessment criteria within the units. To help centres with this, OCR has produced Candidate Evidence Sheets and Candidate Evidence Checklists.

The Candidate Evidence Sheets act as assignment sheets for completion (per unit) and the Candidate Evidence Checklists act as both a checklist and a signposting document for completion, where the candidates have chosen to produce a portfolio of evidence. Both the Candidate Evidence Sheets and the Candidate Evidence Checklists are designed to ensure that all assessment requirements are satisfied and can be found on the OCR website (www.ocr.org.uk).

Key features of the assessment for these qualifications are:

- Assessment of all units is by centre devised activity/assignments or based on real work
- Achievement at unit level is pass or fail.

Assessment of these qualifications will be conducted in accordance with the appropriate codes of practice approved and published by the regulatory authorities.

When candidates complete an assignment/activity, the centre assessor (usually the teacher/tutor) assesses their work. Centres will need to identify staff who will act as assessors. Assessors will need to have experience in making judgments about candidates' progress.

When candidates have completed all the tasks in the assignment, the centre assessor (usually the teacher/tutor) assesses their work. Centres will need to identify staff who will act as assessors. Assessors will need to have experience in making judgments about candidates' progress.

Assessors must:

- judge candidate work against the assessment criteria identified in the unit and assignment.
- identify valid and sufficient evidence.
- identify gaps in evidence and ensure these are filled before the unit is sent to the OCR moderator.
- give feedback to candidates.
- liaise with other assessors in the centre to ensure standards.
- verify candidate achievement by completing and signing the required OCR documentation (ie the witness statement area of the Candidate Evidence Sheets, the Candidate Evidence Checklists, Submission Cover Sheets).
- ensure that copies of candidates' work are taken before submission as work cannot be returned by OCR.
- maintain records of candidates' achievements.

Full details of the administration arrangements associated with these qualifications are included in the *Admin guide: Vocational Qualifications (A850)* which can be downloaded from the OCR website www.ocr.org.uk.

Please note that it is not a requirement of the Certificates in Principles of Customer Service that evidence be gained in the workplace. However, evidence collected for these qualifications may also be used to prove that the knowledge and understanding sections of related NVQ units have been achieved. If centres do wish to use evidence in this way, they must then ensure that the evidence is produced within the workplace, in line with the assessment strategy for the NVQs in Customer Service. Please see the centre handbook for the NVQs in Customer Service for full details of the requirements for evidence used in this context.

Internal standardisation

Internal standardisation is an important part of the local assessment process. Centres are required to demonstrate that a system is in place which ensures that all assessment is being carried out in a similar way and to an equivalent standard across all teachers/tutors acting as assessors. OCR will require evidence of this process. Centres are required to keep evidence of standardisation and records of any decisions/issues for a minimum of one year.

In order to maintain a consistent approach to internal standardisation, a centre co-ordinator should be nominated. The centre co-ordinator will be responsible for:

- maintaining a list of current assessors
- ensuring that all current assessors are working to the same standard
- arranging regular meetings
- ensuring cross-moderation of work between assessors
- maintaining records of the outcome of cross-moderation activities
- regularly sampling the assessment of all assessors and documenting the outcome
- advising assessors of any discrepancies in assessment and suggesting ways in which assessment may be brought into line with the work of other assessors
- completing the relevant centre standardisation document.

External moderation

External moderation ensures centres' internal assessments meet the national requirements of these qualification(s).

OCR Examiner-moderators are allocated by OCR to moderate centre assessment decisions.

OCR requires centres to submit only the appropriate documentation for specific units for moderation. OCR does not require centres to submit for moderation additional evidence produced by the candidate in the course of an activity. OCR, however, anticipates that centres will wish to create programmes of learning for candidates towards the completion of these units that will generate additional items of evidence. Centres are free to do this, but OCR does not require these items for accreditation of unit achievement.

OCR requires that all Candidate Evidence Sheets and Candidate Evidence Checklists submitted in support of achievement are signed by the teachers/tutor prior to submission for moderation.

Teachers/tutors must check that each criterion has been successfully met by the candidate before work is signed and sent for external moderation.

Submissions of work may be sent to the OCR-appointed Examiner-moderator by post or email. Further guidance regarding submitting work via email can be found in the document titled *E-submissions Guidance* which can be found on the Principles of Customer Service web pages of the OCR website (www.ocr.org.uk).

External moderation of a centre's assessment decisions is achieved through systematic sampling. The assessment decisions of each assessor submitting work will be sampled. The outcomes of moderation will apply to all work submitted in each batch for moderation. No substitution of candidates' work will be allowed unless prior agreement of the OCR Examiner-moderator has been obtained.

The Examiner-moderator will complete a Centre Feedback Report Form (eNQF6) for the batch. If the centre assessment is satisfactory, arrangements will be made for certification.

If an Examiner-moderator disagrees with an assessor's assessment decision; the claims from that assessor will be rejected. The Examiner-moderator will record the information on the Centre Feedback Report Form (eNQF6).

Examiner-moderators are not empowered to enter into direct contact with centres. In no circumstances must centres attempt to contact their Examiner-moderator in any way other than through posting candidate work to the address provided to them by OCR. Any queries concerning the units or assessment must be directed to OCR, Coventry.

Full details of the administration arrangements associated with these qualifications are included in the *Admin guide: Vocational Qualifications (A850)* which can be downloaded from the OCR website www.ocr.org.uk.

3.2 Media that may be used

Evidence can take many forms, for example, photographs, videos, audio tapes, CD-ROMs and paper-based or digitally formatted documents.

4 Assessor Requirements

4.1 Assessment Centre Requirements

The Assessment Centre must:

- Ensure that there are a sufficient number of people either trained or qualified to assess the number of candidates they anticipate to register
- Ensure that there is a system of standardisation in place to ensure that all assessments are consistent and fair
- Ensure that those undertaking the role of assessment maintain their skills, knowledge and understanding regarding assessment and the associated qualification.

The occupational expertise of those undertaking the roles of assessment is one of the key factors underpinning valid, fair and reliable assessment. The integrity of assessments is of paramount importance.

4.2 Assessor Requirements

Assessment is an activity that can be performed by a dedicated individual or as part of an individual's wider role e.g. Supervisor, manager, tutor. All assessors must have:

- a thorough knowledge of the Level 1, 2, 3 or 4 National Occupational Standards for Customer Service appropriate to the Level the Assessor is working at, and the ability to interpret them across a wide variety of customer service environments
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills
- experience of assessing vocational qualifications

5 Certification

Candidates who achieve the full qualification will receive:

- a certificate listing the unit achieved with their related credit value, and
- a certificate giving the full qualification title

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Candidates achieving one or more units but who do not meet the credit requirements for a full certificate will receive a certificate listing the units they have achieved along with their credit value.

5.1 Claiming certificates

Certificates will be issued directly to the centre for successful candidates. In order to ensure that these are automatically issued centres must ensure that the OCR candidate number is **always** used where a candidate has already achieved one or more units. See the *Admin guide: Vocational Qualifications (A850)* for full details.

5.2 Replacement certificates

If a replacement certificate is required a request must be made to the OCR Operations Division on 024 76 470033, or in writing to the Coventry office, and an application form with further instructions will be sent. A charge will be made for a replacement certificate.

6 Qualification Structure and Units

6.1 Qualification structure

Candidates do not have to achieve units in any particular order and teachers/tutors should tailor learning programmes to meet individual candidate needs. It is recommended that, wherever possible, centres adopt a holistic approach to the delivery of these qualifications and identify opportunities to link the units/different subjects and levels.

If a candidate is not able to complete the full qualification, their achievements will be recognised through the issue of a unit certificate listing the units achieved.

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Qualification Accreditation Number 600/0840/4

To achieve these qualifications, candidates must achieve a total of 13 credits made up as follows:

3 units from mandatory Group A. Candidates must achieve 13 credits.

The following table contains the group of mandatory units.

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group A - Mandatory Units					
1	Understand the principles of customer service	R/502/9652	4	1	30
2	Understand the rules of customer service	Y/502/9653	4	2	30
3	Understand the use of communication in customer service	D/502/9654	5	2	33

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Qualification Accreditation Number 600/0752/7

To achieve these qualifications, candidates must achieve a total of 17 credits made up as follows:

3 units from mandatory Group A. Candidates must achieve 17 credits.

The following table contains the groups of mandatory units.

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group A - Mandatory Units					
3	Understand the use of communication in customer service	D/502/9654	5	2	33
4	Understand the principles of customer service delivery in different sectors	H/502/9655	6	3	40
5	Understand the principles of making improvements to customer service	K/502/9656	6	3	40

6.2 Unit format

The format of OCR's units is detailed below.

A unit title

This is a summary of the content of the unit.

Level

This advises the QCF level on which the unit is accredited.

Credit value

This advises how many credits the candidate will achieve for successful achievement of the unit.

Guided learning hours (glh)

This specifies the amount of time that the average candidate would be expected to take to complete all requirements of the unit.

Unit expiry date

This section specifies the end accreditation date of the unit.

Unit purpose and aim

This section specifies the overall purpose and aim of the unit.

Learning outcomes

These set out what the candidate is expected to know, understand or be able to do as a result of the learning process.

Assessment criteria

These detail the requirements that the candidate will be assessed against in order to evidence the learning outcomes.

Knowledge, understanding and skills

This details the underpinning knowledge, understanding and skills which candidates will need in order to be able to undertake the assessment for the unit and to meet the requirements of the assessment criteria.

Assessment

This section details how the assessment criteria will be assessed.

Evidence requirements

These provide specific detail to amplify the knowledge or understanding required to meet the assessment criteria.

Guidance on assessment and evidence requirements

This provides guidance on how the assessment could be carried out and how the evidence requirements could be met.

National Occupational Standards (NOS) mapping/signposting

This section provides mapping/signposting to the relevant National Occupational Standards.

Functional skills signposting

This section provides signposting to functional skills.

Resources

This section contains details of any specific resources that must be available to the candidate or suggested resource material that will support learning.

6.3 Units

Units can be downloaded from the OCR website:

http://www.ocr.org.uk/qualifications/type/qcf/cus_ser/index.html

7 Administration Arrangements

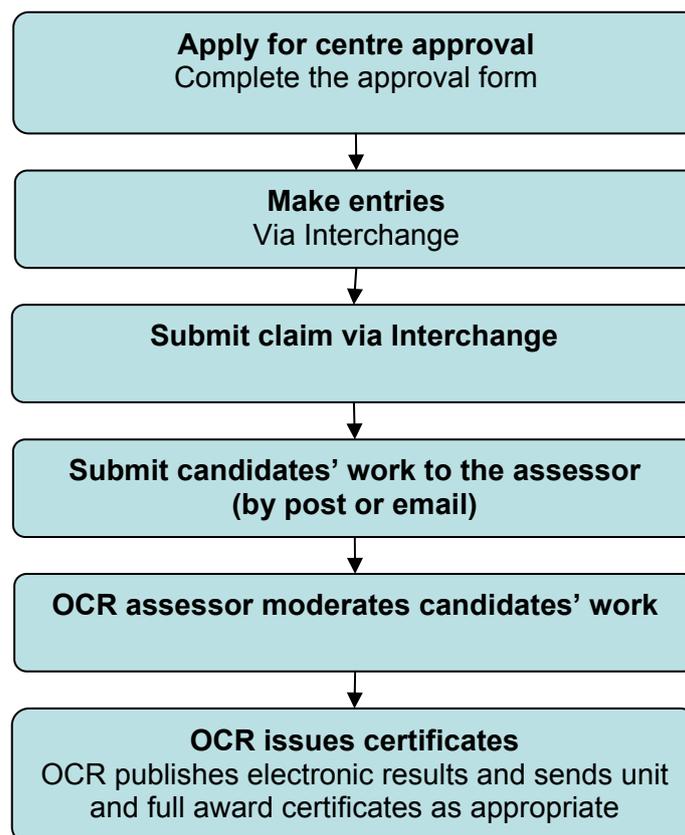
This section provides an overview of the administration arrangements operating for these qualifications. Please refer to the *Admin guide: Vocational Qualifications (A850)* for further information.

7.1 Overview of full process

For detailed information on these qualifications centres must refer to OCR's Admin guide: Vocational Qualifications (A850).

The following flow chart provides a brief summary of how these qualifications are delivered.

Administration flowchart for on demand/postal moderation



8 Recording Documentation

8.1 OCR Candidate Evidence Sheets and Checklists

Candidate Evidence Sheets and Candidate Evidence Checklists have been produced to support candidates in producing appropriate evidence for these qualifications.

The Candidate Evidence Sheets act as assignments for candidates to complete. A Candidate Evidence Sheet is available for each unit within the qualifications and can be found on the OCR website (www.ocr.org.uk). These have been designed to allow candidates to sufficiently meet all assessment criteria and evidence requirements contained within each unit.

Centre-devised assignments may be produced as an alternative. However, these must ensure that candidates are able to sufficiently meet all of the assessment criteria and evidence requirements of the unit. They must also contain a witness statement section for completion. Each assessment criteria should be referenced within the assignment so that it is absolutely clear where it has been met. Centres must also take into consideration the assessment requirements contained within the OCR-produced checklists, to ensure that candidate responses cover each assessment criteria sufficiently and consistently.

If portfolios of evidence are produced, centres should use and complete the OCR Candidate Evidence Checklists to ensure sufficiency of coverage for each assessment criteria, and to signpost where evidence can be found within the portfolio.

All evidence **must** be marked before submission. This should be indicated through a tick and/or feedback comment on each marking point. Tutors should check that there are no gaps in the evidence. Incomplete evidence should not be submitted. Centres should have an internal moderation process in place to ensure consistency of assessment across assessors.

When candidates have completed their work, assignments or checklists must be signed in the witness statement area **by both the candidate and assessor before submission**, to confirm that the work has been individually produced by the candidate and that the assessor is satisfied that all criteria have been sufficiently met.

Candidate Evidence Sheets and Candidate Evidence Checklists can be found under the forms area of the Principles of Customer Service web pages:

http://www.ocr.org.uk/qualifications/type/qcf/cus_ser/index.aspx

9 Guidance For Candidates

9.1 What are the OCR Level 2 and Level 3 Certificates in Principles of Customer Service?

The **OCR Level 2 Certificate in Principles of Customer Service** qualification is suitable for those who are:

- preparing for employment in a job that involves customer service
- starting work in a job that involves customer service and wishing to learn essential knowledge, understanding and skills at the same time as learning the job
- already experienced in a job involving customer service and wishing to update their knowledge, understanding and skills in order to improve their customer service performance
- returning to work or changing their job role to one which involves customer service
- embarking on an Apprenticeship in Customer Service.

The **OCR Level 3 Certificate in Principles of Customer Service** is suitable for those who:

- are already experienced in a job involving customer service and wish to update their knowledge, understanding and skills to improve their customer service performance
- wish to develop their full potential and/or the potential of others to deliver and improve customer service
- are seeking career progression through jobs involving customer service
- are undertaking or preparing to undertake the Level 3 NVQ Diploma in Customer Service
- wish to add to their personal portfolio of qualifications for acceptance on to other courses
- are embarking on an Apprenticeship in Customer Service.

It will also be suitable for those preparing for employment in job roles where they will be expected to carry out activities with a significant customer service focus.

9.2 What do I have to do to achieve these qualifications?

To achieve these qualifications you must achieve the required combination of units from those listed below.

OCR Level 2 Certificate in Principles of Customer Service

Qualification Accreditation Number 600/0840/4

To achieve these qualifications, candidates must achieve a total of 13 credits made up as follows:

3 units from mandatory Group A, candidates must achieve 13 credits.

The following table contains the group of mandatory units.

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
1	Understand the principles of customer service	R/502/9652	4	1
2	Understand the rules of customer service	Y/502/9653	4	2
3	Understand the use of communication in customer service	D/502/9654	5	2

OCR Level 3 Certificate in Principles of Customer Service

Qualification Accreditation Number 600/0752/7

To achieve these qualifications, candidates must achieve a total of 17 credits made up as follows:

3 units from mandatory Group A, candidates must achieve 17 credits.

The following table contains the groups of mandatory units.

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
3	Understand the use of communication in customer service	D/502/9654	5	2
4	Understand the principles of customer service delivery in different sectors	H/502/9655	6	3
5	Understand the principles of making improvements to customer service	K/502/9656	6	3

9.3 What if I cannot gain enough credits for a full qualification?

These qualifications are very flexible and allow you to achieve recognition for what you have already achieved even if you do not finish the full qualification. OCR has systems in place which allow you to be awarded a certificate listing the unit (or units) you have achieved even if you are unable to complete the full qualification.

9.4 How do I know that these qualifications are right for me?

These qualifications are designed for candidates wishing to gain an appropriate qualification for the purposes of working in the customer service sector.

These qualifications may also form a progression route to higher level courses such as Higher National Diploma (HND) or other appropriate higher education qualifications.

9.5 How are the units assessed?

The units are assessed by centre based assessment and external moderation.

9.6 Do I need to pass all of the units?

The units that need to be passed in order to achieve a full Certificate in Principles of Customer Service are detailed in section 9.2. However, each unit represents a worthwhile achievement in its own right, and certification is also available at unit level.

9.7 How do I keep track of my achievements?

We have designed a **Record of Achievement** form for you to use to keep track of your achievements. This form is optional (you do not have to use it if you do not want to).

9.8 Can my work for these qualifications prepare me for my Functional Skills?

The work that you do for these qualifications may help to prepare you for functional skills assessment. Mapping to functional skills can be viewed in the individual units.

OCR wishes you every success in your achievement of these qualifications.

10 Mapping and Signposting

10.1 National Occupational Standards (NOS) Mapping

These qualifications provide a key progression route between education and employment (or further study/training leading to employment). It is directly relevant to the needs of employers and relates to National Occupational Standards (NOS).

Each unit contains details of the signposting to the NOS.

10.2 Functional skills signposting

Training provided for customer service may help to prepare candidates for the functional skills assessment (e.g. report writing may be good preparation for English). It is likely however that further training would be needed to fully prepare candidates for functional skills assessment.

11 Further Support and Information

11.1 Enquiries

For enquiries relating to any of OCR's vocational qualifications, please contact the OCR Customer Contact Centre on:

Telephone: 024 76 851509
Fax: 024 76 851633
Email: vocational.qualifications@ocr.org.uk

Alternatively, you could visit OCR's website at www.ocr.org.uk for further information on OCR qualifications.

11.2 Results enquiries

For information about result enquiries please refer to the OCR website at www.ocr.org.uk.

11.3 Customer feedback

We welcome feedback from customers on all aspects of our provision. Comments relating to this documentation should be sent to:

The OCR Qualifications Manager
Principles of Customer Service
Qualifications Division
OCR
Coventry Office
Westwood Way
Coventry
CV4 8JQ

11.4 OCR Training Events

Information on OCR's training events for centres can be found on the OCR website by going to www.ocr.org.uk, or by contacting:

OCR Training
Customer Support Division
Progress House
Westwood Way
Coventry CV4 8JQ

Telephone: 02476 496 398
Fax: 02476 496 399
Email: training@ocr.org.uk

11.5 OCR Publications

The OCR Publications Service offers support to OCR customers, centres, parents and candidates. It offers a wide range of up-to-date materials for sale which relate to our key qualifications. These materials include specifications, past papers, mark schemes and a range of support materials.

The OCR Publications Catalogue holds the full list of materials currently available to order. To obtain a copy of this and to order publications, please go to <http://publications.ocr.org.uk> or call our dedicated order line on 0870 770 6622.

Orders can also be emailed to publications@ocr.org.uk or posted to the address on the order form printed in the OCR Publications Catalogue.

OCR Support Materials prepare extra resources to help you deliver our qualifications. These support materials can be ordered from OCR Publications and more information about the materials can be obtained from support.materials@ocr.org.uk.

11.6 Documents related to these qualifications

OCR's *Admin guide: Vocational Qualifications (A850)*

JCQ publications:

- *Access Arrangements, Reasonable Adjustments and Special Consideration;*
- *Instructions for Conducting Examinations;*
- *Suspected Malpractice in Examinations and Assessments*

12 Glossary

Analyse	to examine in detail in order to discover meaning, essential features, etc
Apply	to devote oneself with diligence to bring into operation or use to put to practical use; utilise; employ
Assess	to judge the worth, importance, etc, of; evaluate
Calculate	to solve (one or more problems) by a mathematical procedure; compute
Carry out	to perform or cause to be implemented
Chart	to plot or outline the course of to make a detailed plan of to make a chart of
Classify	to arrange or order by classes; categorise
Collect	to gather together or be gathered together
Communicate	to impart (knowledge) or exchange (thoughts, feelings, or ideas) by speech, writing, gestures, etc
Compare	to regard or represent as analogous or similar; liken
Compile	to make or compose from other materials or sources
Complete	to make whole or perfect to end; finish
Conduct	to do or carry out
Contrast	to distinguish by comparison of unlike or opposite qualities
Contribute	to give (support, money, etc) for a common purpose or fund to supply (ideas, opinions, etc) as part of a debate or discussion
Cook	to prepare (food) by the action of heat, as by boiling, baking, etc, or (of food) to become ready for eating through such a process
Define	to state precisely the meaning of (words, terms, etc)
Deliver	to carry (goods, etc) to a destination, esp. to carry and distribute (goods, mail, etc) to several places to hand over, transfer, or surrender to produce or perform something promised or expected
Demonstrate	to show, manifest, or prove, esp. by reasoning, evidence, etc
Describe	to give an account or representation of in words
Design	to work out the structure or form of (something)
Detail	to list or relate fully to include all or most particulars
Develop	to come or bring to a later or more advanced or expanded stage; grow or cause to grow gradually
Devise	to work out, contrive, or plan (something) in one's mind
Discuss	to have a conversation about; consider by talking over; debate to treat (a subject) in speech or writing
Estimate	to form an approximate idea of (distance, size, cost, etc); calculate roughly; gauge

Evaluate	to ascertain or set the amount or value of to judge or assess the worth of; appraise
Examine	to look at, inspect, or scrutinise carefully, or in detail; investigate
Explain	to make (something) comprehensible, esp. by giving a clear and detailed account of the relevant structure, operation, surrounding circumstances, etc
Explore	to examine or investigate, esp. systematically
Generate	to produce or bring into being; create
Give	to present or deliver voluntarily (something that is one's own) to the permanent possession of another or others to impart or communicate
Identify	to prove or recognise as being a certain person or thing; determine the identity of
Illustrate	to clarify or explain by use of examples, analogy, etc
Implement	to carry out; put into action; perform
Interact	to act on or in close relation with each other
Interpret	to clarify or explain the meaning of; elucidate
Investigate	to inquire into (a situation or problem) thoroughly; examine systematically, especially in order to discover the truth
Justify	to prove or see to be just or valid; vindicate to show to be reasonable; warrant or substantiate
Keep	to have or retain possession of
Lead	to show the way to (an individual or a group) by going with or ahead to guide or be guided by holding, pulling, etc to phrase a question to (a witness) that tends to suggest the desired answer
Measure	to determine the size, amount, etc, of by measurement
Monitor	to observe or record (the activity or performance) of (an engine or other device)
Organise	to form (parts or elements of something) into a structured whole; co ordinate
Outline	to give the main features or general idea of
Participate	to take part, be or become actively involved, or share (in)
Perform	to carry out or do (an action)
Plan	to have in mind as a purpose to make a plan of (a building)
Prepare	to make ready or suitable in advance for a particular purpose or for some use, event etc to put together using parts or ingredients; compose or construct to equip or outfit
Present	to show, exhibit to put forward; submit to bring or suggest to the mind
Produce	to bring (something) into existence; yield to bring forth (a product) by physical or mental effort; make
Profile	to draw, write or make a profile of

Promote	to further or encourage the progress or existence of to raise to a higher rank, status degree etc to urge the adoption of; work for to encourage the sale of (a product) by advertising or securing financial support
Propose	to put forward (a plan, motion, etc) for consideration or action
Provide	to put at the disposal of; furnish or supply
Recognise	to perceive (a person, creature, or thing) to be the same as or belong to the same class as something previously seen or known; know again
Recommend	to advise as the best course or choice; counsel
Research	to carry out investigations into (a subject, problem etc)
Review	to look at or examine again to look back upon
Select	to choose (someone or something) in preference to another or others
Serve	to render or be of service to (a person, cause, etc); help to distribute or provide
Show	to make, be, or become visible or noticeable to indicate or explain; prove
Suggest	to put forward (a plan, idea, etc) for consideration
Summarise	to make or be a summary of; express concisely
Understand	to know and comprehend the nature or meaning of
Undertake	to contract to or commit oneself to (something) or to do (something)
Use	to put into service or action; employ for a given purpose