

Customer Service Centre Handbook

OCR Level 1 NVQ Certificate in Customer Service

OCR Level 2 NVQ Certificate in Customer Service

OCR Level 3 NVQ Diploma in Customer Service

Scheme code 03454, 03455, 03456

Version 4 – updated February 2019

Please note:

03454 is closed for entry and closed for certification on 31st August 2018

03456 is closed for entry and closes for certification on 31st August 2019

1. Key updates to this handbook

Section	Title of section and change	Version and date issued
All sections	Updated: Registered office address Copyright	Version 04 February 2019
2	2.9 Qualification size updated for clarity	
3	3.5 Authentication 3.18 Candidate cumulative assessment record	
9	9.2 Our professional development programme (CPD)	
All sections	Amended reference to the Admin Guide to the new Administration area on the OCR website References to the Qualifications and Credit Framework (QCF) have been changed to Regulated Qualifications Framework.	
2	The following information has been updated: 2.5 Unique Learner Numbers and the Personal Learning Record 2.10 Funding - information and links updated 2.13 Delivery in Wales and Northern Ireland 2.16 Reporting a suspected malpractice	
3	3.1 and 3.12: Information added about data protection	
7	Administration arrangements – section deleted	
10	10.3 complaints information updated	

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1 Introduction

OCR entry code	Title	Qualification Number
03454	OCR Level 1 NVQ Certificate in Customer Service	500/9843/3
03455	OCR Level 2 NVQ Certificate in Customer Service	500/8625/X
03456	OCR Level 3 NVQ Diploma in Customer Service	500/8626/1

The information provided in this handbook is correct at the time of production. Occasionally we may update this information so please check the qualification [webpages](#) for the most up-to-date information.

This handbook contains what you need to know about the planning, delivery and assessment of these qualifications. Staff involved in the delivery of these qualifications must have access to and understand the requirements in this handbook.

To access information on how to administer these qualifications please follow the link to the Administration area <http://www.ocr.org.uk/administration/>.

You should ensure 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.

1.1 The OCR Customer Service suite of qualifications

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).

These qualifications are in the Regulated Qualifications Framework.

1.2 Administration arrangements for these qualifications

For information on how to administer these qualifications please follow the link to OCR's Administration area, www.ocr.org.uk/administration/.

2 General information

2.1 Qualification profile

Title	OCR Level 1 NVQ Certificate in Customer Service			
OCR code	03454			
QAN	500/9843/3			
Level	This qualification is on the Regulated Qualifications Framework at Level 1			
Qualification structure	To achieve this qualification, candidates must complete a total of 22 credits, 8 from the mandatory units, 14 from the optional units. Candidates must select at least 1 unit from each optional group 1, 2 and 3 of which a minimum of 8 credits must be achieved at Level 1.			
Age group approved	Pre-16	16-18	18+	19+
	✓	✓	✓	✓
This qualification is suitable for	This qualification provides an opportunity to gain the basic skills and knowledge needed for a career in customer service or any job which involves dealing with customers, encompassing a broad range of competencies from the customer service sector. This NVQ has been designed so that some evidence can be gained from the workplace and some from simulation.			
Entry requirements	There are no formal entry requirements for this qualification.			
Assessment	This qualification is pass/fail.			
	This qualification is internally assessed by centre staff and externally verified by OCR Assessors.			
Last date to enter candidates	Closed for entry and closed for certification on 31st August 2018.			

Title	OCR Level 2 NVQ Certificate in Customer Service			
OCR code	03455			
QAN	500/8625/X			
Level	This qualification is on the Regulated Qualifications Framework at Level 2			
Qualification structure	To achieve this qualification, candidates must complete a total of 28 credits, 8 credits from the mandatory units, 20 credits from the optional units. Candidates must select at least 1 unit from each optional group 1, 2, 3 and 4 of which a minimum of 11 credits must be achieved at Level 2.			
Age group approved	Pre-16	16-18	18+	19+
	✓	✓	✓	✓
This qualification is suitable for	People whose customer service role requires well developed behavioural competence but whose scope for independent decision making and bringing about change is limited.			
Entry requirements	There are no formal entry requirements for this qualification			
Assessment	This qualification is pass/fail. This qualification is internally assessed by centre staff and externally verified by OCR Assessors.			
Last date to enter candidates	If we are going to withdraw a qualification we'll set an end date for entries and certification and we'll tell you what the arrangements are for the last date to enter candidates and make claims for certificates.			

Title	OCR Level 3 NVQ Diploma in Customer Service			
OCR code	03456			
QAN	500/8626/1 (Qualification Accreditation Number)			
Level	This qualification is on the Regulated Qualifications Framework at Level 3.			
Qualification structure	To achieve this qualification, candidates must complete a total of 42 credits, 12 credits from the mandatory units, 30 credits from the optional units. Candidates must select at least 1 unit from each optional group 1, 2, 3 and 4 of which a minimum of 10 credits must be achieved at Level 3.			
Age group approved	Pre-16	16-18	18+	19+
		✓	✓	✓
This qualification is suitable for	People who have the scope to bring about permanent improvements in service delivery that benefit customers and the organisation for which they work. Such individuals do not have to be in roles where they have direct line responsibility for people.			
Entry requirements	There are no formal entry requirements for this qualification.			
Assessment	This qualification is pass/fail. This qualification is internally assessed by centre staff and externally verified by OCR Assessors.			
Last date to enter candidates	Closed for entry and closes for certification on 31st August 2019			

2.2 Target market

These qualifications are suitable for those who wish to undertake Customer Service activities at Levels 1, 2 or 3.

2.3 Qualification aims

The aim of these qualifications is to recognise the skills and competences of candidates in the workplace.

The **OCR Level 1 NVQ Certificate in Customer Service** provides an opportunity to gain the basic skills and knowledge needed for a career in customer service or any job which involves dealing with customers, encompassing a broad range of competencies from the customer service sector. This NVQ has been designed so that some evidence can be gained from the workplace and some from simulation.

The **OCR Level 2 NVQ Certificate in Customer Service** is primarily aimed at candidates who undertake a customer service role and recognises that employment in the customer service sector involves a diverse range of functions, tasks and activities that are constantly developing and changing.

It is suitable for candidates:

- who have particular customer service and administrative job roles
- who are working in a customer service environment
- whose role is to provide service to customers.

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 supervisions 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.

2.4 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.

2.5 Unique Learner Number (ULN) and the Personal Learning Record (PLR)

This is a personal ten-digit number, which is used to ensure learner achievement information can be provided to their Personal Learning Record (PLR). ULNs are provided and administered by the Learning Records Service (LRS).

Learners over the age of 14 in UK education or training can access the PLR using their ULN. Learners keep the same ULN to access their PLR throughout their lives and whatever their level of learning.

Candidates that claim certification for publically funded qualifications must have a valid ULN.

Where a candidate has a ULN, you must enter their ten digit number in the ULN field when making entries via Interchange. 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 PLR.

Further information about this can be found in the [Administration area](#) and at the [Learner Records Service](#).

2.6 Progression opportunities

These qualifications have been designed to encourage progression to further learning in a related discipline and candidates may also progress to employment in a wide range of customer service roles as this qualification provides evidence of achievement of a range of practical skills, understanding and knowledge in Customer Service.

2.7 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.

For example, health and safety issues and their application are an integral part of Unit B12. In this unit candidates will need to understand the legislative requirements and how to maintain and develop a healthy safe and safe customer service environment.

2.8 Qualification size

The size of each qualification is described in terms of Guided Learning Hours (GLH) and Total Qualification Time (TQT).

GLH indicates the approximate time (in hours) that the learner will be supervised during any teaching, learning or assessment activities. We have worked with people who are experienced in delivering the qualification to determine what content needs to be taught and how long it will take to deliver.

TQT is comprised of two elements: GLH, and an estimate of the number of hours a learner will reasonably spend on any unsupervised learning or assessment activities (including homework) so they can successfully achieve their qualification.

OCR Level 2 NVQ Certificate in Customer Service requires a minimum of 192 glh and 280 TQT

2.9 Funding

Funding arrangements can be subject to change. For the latest details about approval and funding eligibility, we recommend you visit the following websites:

[Register of Regulated Qualifications](#) – Ofqual’s register of regulated qualifications

Department for Education (DfE) [Section 96](#) – for confirmation of the approval of qualifications to be delivered to specific age ranges

[Education and Skills Funding Agency](#) for funding education and training for children, young people and adults in England

[Department for the Economy](#) for public funding in Northern Ireland

[Qualifications in Wales](#) database (QiW) for public funding in Wales

Use the Ofqual Qualification Number (QN) when you’re looking for information on qualification eligibility for public funding.

If you have any queries about funding for these qualifications email us at funding@ocr.org.uk.

2.10 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.

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.

2.11 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 in the OCR Administration area, <http://www.ocr.org.uk/administration/> 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.

2.12 Delivery in Wales and Northern Ireland

Candidates in Wales and 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, we have used neutral terms so candidates may apply whatever is appropriate to their own situation.

We will provide handbooks, assessments and supporting documentation in English. Only answers provided in English will be assessed.

2.13 Accessibility

There can be adjustments to standard assessment arrangements 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 shared between the centre and OCR. Please read the JCQ booklet *Access Arrangements and Reasonable Adjustments* at www.jcq.org.uk.

For further guidance on access arrangements and special consideration follow the link to the Administration area <http://www.ocr.org.uk/administration/>.

If the tutor/assessor thinks any aspect of these qualifications unfairly restricts access and progression, please email or call the OCR Customer Support Centre.

2.14 Reporting suspected malpractice

It is the responsibility of the Head of Centre¹ to report all cases of suspected malpractice involving centre staff or candidates. A JCQ Report of Suspected Malpractice form (JCQ/M1 for candidate suspected malpractice or JCQ/M2a for staff suspected malpractice) is available to download from the [JCQ website](http://www.jcq.org.uk) and should be completed as soon as possible and emailed to malpractice@ocr.org.uk.

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

Further information regarding reporting and investigating suspected malpractice and the possible sanctions and penalties which could be imposed, is contained in the JCQ publication: *General and Vocational Qualifications – Suspected Malpractice in Examinations and Assessments*; this is available from the [JCQ website](http://www.jcq.org.uk). Centres may also like to refer to the OCR Website for more details.

¹ This is the most senior officer in the organisation, directly responsible for the delivery of OCR qualifications, e.g. the Head Teacher or Principal of a school/college. The Head of Centre accepts full responsibility for the correct administration and conduct of OCR exams

3 Assessment

3.1 Assessment: How it works

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.

Centre assessors, who are responsible for assessing candidates' evidence for internally assessed units, must make sure that candidates know they must comply with the Data Protection Act when they are producing work for assessment. Candidates must not reference another individual's personal details in any evidence produced for assessment. It is the candidate's responsibility to make sure evidence that includes another individual's personal details is anonymised

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 and OCR verified

3.2 Initial assessment of candidates

It is important for centres to carry out some form of initial assessment that identifies what competence and knowledge a candidate already has and the gaps that they need to look at. This will help plan the assessment because it allows assessors to help candidates understand the best place to start collecting evidence. It will also identify units which candidates might have difficulty finishing. Please note that evidence generated from the optional units can often be cross-referenced to the mandatory units.

It is recommended that, in the majority of cases, it would be beneficial for candidates to start with an optional unit which reflects the work they carry out within their job role.

3.3 Assessment planning

Assessors must take responsibility for assessment planning with candidates. This will involve agreeing a number of issues with candidates including:

- finding the best source of evidence to use for particular units
- finding the best way of assessing the candidate
- confirming the best times, dates and places for the assessments to take place
- agreeing and listing candidate action to be undertaken before the next assessment visit.

Assessors must provide regular opportunities for reviewing assessment plans with candidates and give constructive feedback on each occasion. Assessment plans should provide guidance to the candidate about what evidence they should collect and why.

3.4 Making assessment decisions

It is not necessary for candidates to meet all the criteria every time they carry out an activity but **it is necessary that all candidates produce their own evidence to meet all assessment criteria.** They must consistently provide enough evidence for assessors to believe that the candidate is competent in their working environment.

In line with the Learning and Development standard A1, assessors should:

- plan with the candidates
- assess candidate performance, knowledge and understanding
- look at the evidence
- question and give feedback to the candidate working towards these qualifications.

They should also be satisfied that the candidate has demonstrated competence when meeting the assessment criteria.

All criteria must be completed before the assessor can sign the unit off as complete.

Full details of the administration arrangements associated with these qualifications please follow the link to OCR's Administration area, www.ocr.org.uk/administration/.

Methods of assessment

It is the assessor's responsibility to agree the best method of assessing a candidate in relation to their individual circumstances. The methods agreed must be:

- valid
- reliable
- safe and manageable
- suitable to the needs of the candidate.

Valid

A valid assessment method is one that is capable of measuring the knowledge or skills in question. For example, a written test cannot measure a candidate's practical skills or their ability to work well with others.

Validity can also be compromised if a candidate does not understand what is required of them. For example, one valid method of assessing a candidate's knowledge and understanding is to question them. If the questions posed are difficult for the candidate to understand (not in terms of the content but the way they are phrased, for example), the validity of the assessment method is questionable.

As well as assessment methods being valid, the evidence presented must also be valid. For example, it would not be appropriate to present an organisation's policy on "data protection" as evidence towards the requirement of the unit, "the main things you must do and not do in your job under laws covering data protection", unless developed by the candidate, as it would not allow for valid assessment. It may be more appropriate for the candidate and assessor to have a discussion

about the policy and for the candidate to explain how it is relevant, illustrated with examples from their work of their compliance to the requirements. This discussion could then be assessed by the assessor and recorded as evidence.

Reliable

A reliable method of assessment will produce consistent results for different assessors on each assessment occasion. Internal verifiers must make sure that all assessors' decisions are consistent.

Safe and manageable

Assessors and internal verifiers must make sure that the assessment methods are safe and manageable and do not put unnecessary demands on the candidate and/or the organisation they work for.

Suitable to the needs of the candidate

OCR has tried to make sure that the achievement of these qualifications is free from constraints outside the requirements of the candidate's job role.

For candidates who have access requirements please see section 2.13 [Accessibility](#) of this handbook.

If centre staff think that any aspect of these qualifications unfairly restricts access and progression, they should talk to their OCR external verifier about this.

OCR in partnership with the sector body and other awarding bodies have identified the following main assessment methods which are suitable for these qualifications:

- **direct observation** of practice by a qualified assessor for occupational specific units
- **examining the evidence** by an assessor
- **questioning** the candidate or witness by an assessor
- **inference of knowledge** from direct observation

In some situations, the assessor can speak to the candidate to provide evidence of the candidate's performance and knowledge (see [Professional discussion](#)).

3.5 Authentication

Tutors must be confident that the work they mark is the candidate's own. This does not mean that a candidate must be supervised throughout the completion of all work but the tutor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of the candidate's work.

Wherever possible, the tutor should discuss work-in-progress with candidates. This will not only ensure that work is underway in a planned and timely manner but will also provide opportunities for tutors to check authenticity of the work and provide general feedback.

Where permitted by the specification, the work of individual candidates may be informed by working with others, for example, in undertaking research, but candidates must provide an individual response as part of any task outcome.

Please note: Your centre must confirm to us that the evidence produced by candidates is authentic. The Evidence Record Sheet includes a declaration for candidates to sign and is available from the webpage.

Plagiarism

Candidates 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 the candidate being disqualified. Plagiarism sometimes occurs innocently when candidates are unaware of the need to reference or acknowledge their sources. It is therefore important that centres ensure that candidates understand that work they submit must be their own and that they understand the meaning of plagiarism and what penalties may be applied. Candidates may refer to research, quotations or evidence but they must list their sources.

Resubmitting work for summative assessment

If the tutor and the candidate feel they have not performed at their best during the assessment, the candidate can, at the tutor's discretion, improve their work and resubmit it for assessment. The tutor must ensure it is in the candidate's interests to reattempt the assessment.

Tutors should set a realistic date for the resubmission of work, having considered the purpose of the unit and what the candidate intends to improve. Tutors must record the reasons why they have allowed candidates to resubmit in the centre's assessment decision records and record the feedback given to the candidate on the original work. OCR monitors the assessment decisions which are made.

Centres must not encourage multiple resubmissions of work. Resubmission at the centre assessment stage is intended to allow the candidate to reflect on feedback and improve, but not to be an iterative process where they make small modifications through ongoing feedback to eventually achieve the desired level.

3.6 Examining the evidence

Only approved and qualified assessors (see [Assessor and internal verifier requirements](#)) may examine the evidence for the assessment of these qualifications.

Evidence can:

- reflect how the candidate carried out the process
- be the product of a candidate's work
- be a product relating to the candidate's competence.

For example:

The process that the candidate carries out could be recorded in an observation or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the qualification.

The product of a candidate's work could be, for example, email messages to or from colleagues, project reports etc.

After the assessor has examined the evidence, the assessor must record an assessment decision and the justification for the decision. The assessor should also give feedback to the candidate.

3.7 Observation

Only approved and qualified assessors (see [Assessor and internal verifier requirements](#)) may carry out observations for the assessment of these qualifications.

The assessor and candidate should plan observations 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 should also give feedback to the candidate.

3.8 Questioning

Only approved and qualified personnel (see [Assessor and internal verifier requirements](#)) may question a candidate or witness for the assessment of these qualifications.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through.

Assessors should ask open questions; that is questions where the candidate has to give an answer (other than 'yes' or 'no'). Assessors should also be careful to avoid complicated questions which may confuse the candidate.

It is important that assessors record assessment decisions after they have questioned the candidate. They must record enough information to justify the decisions they make. This does not mean that assessors must record, word for word, the questions put to the candidate and the answers the candidate gives. However, assessors must record enough information about what they asked and how the candidate 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 a candidate's competence over a period of time.

3.9 Professional discussion

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

3.10 Witness testimonies

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

If a witness provides a written statement they should include the following:

- the candidate's name
- the date, time and venue of the activity carried out
- a description of the activities performed by the candidate
- the date of writing the testimony
- a description of the witness' relationship to the candidate
- 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 it relates. Witnesses must direct the information in their testimonies to describing what the candidate did. The assessor will then judge whether the candidate's activities demonstrate competence to the standards. It is not acceptable for candidates to produce written witness testimonies for witnesses to sign, to support a qualification they are working towards.

3.11 Personal statements

This is a candidate's own account of what they did, backed up by reference to evidence or witnesses. Candidates can also produce reflective accounts, but someone who can authenticate them as a true account of what took place must countersign these or alternatively the assessor could question or discuss the evidence with the candidate.

Case studies can be used to generate evidence and can often be cross-referenced and/or used as the basis for discussion to extend evidence on the skills required to for example, handle a situation, or take a different approach to a situation for a different type of customer. The case study could include for example:

- date, time and place
- type of customer/s
- the customer's query/request/problem
- action by the candidate
- outcomes e.g. result/customer comment etc.

3.12 Product evidence

Documents included as product evidence e.g. emails, letters, logs/diaries of how customers have been dealt with/work carried out, forms etc. must have been produced by the candidate or used by them in their job. The evidence must be annotated by the candidate or through assessor questioning to demonstrate their relevance to the candidate and the candidate's job role.

3.13 Where evidence comes from

Evidence may come from a number of different sources, for example:

- from a candidate carrying out workplace activities. Candidates must not reference another individual's personal details in any evidence produced for summative assessment. It is the candidate's responsibility to make sure evidence that includes another individual's personal details is anonymised to comply with the Data Protection Act.
- knowledge evidence may come from a candidate carrying out workplace activities or from the candidate answering the assessor's questions.

3.14 Real work

The qualification(s) require(s) that all assessment of a candidate's performance must take place within the workplace, and that observation should be of naturally occurring practice within the candidate's work role. This will include the demonstration of the application of knowledge. This principle will apply to all units, except where simulation has been deemed acceptable. This principle will apply to all units, except for Units C1 and C2.

3.15 Simulation

Wherever possible, assessment of the Customer Service National NVQ Units should be carried out in a real job (either paid or voluntary). Where this is not possible, this Assessment Strategy does allow for the use of simulation for the following Level 1 NVQ units only:

C1 Recognise and deal with customer queries, requests and problems

C2 Take details of customer service problems.

However, where access to assessment is jeopardised by this, guidance should be sought from OCR who will decide the issue in conjunction with the Sector Skills Council

To undertake assessment of simulated activities for these units, the Guidelines for Simulation shown below must be met:

Simulation can **only** be applied to the Level 1 S/NVQ Units listed below

- ✓ C1 Recognise and deal with customer queries, requests and problems
- ✓ C2 Take details of customer service problems

Simulation is defined by Skills CfA as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

To undertake the assessment of simulated activities for these two units the following guidelines must be met:

- when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say
- the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced
- the person taking part in the simulation as a customer must be credible for the situation that is being simulated
- any resources or equipment that would normally be in real work should be available and in working order for the simulation
- candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work
- candidates should complete the required tasks taking account of legislation and regulation that would apply in real work
- candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality
- whilst the primary purpose of the Simulation is for Assessment, feedback must be given in a way that builds confidence.

Simulations should only be undertaken in the minority of cases, where the candidate is unable to complete the units because of the lack of opportunity within their practice:

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

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

The use of simulation will be indicated in each unit. A realistic working environment is defined by an environment that replicates what is likely to happen when an individual is carrying out their normal duties and activities.

3.16 Medium that can be used

Evidence can take many forms, for example, written work, audio/visual recordings, digitally formatted documents, a product or photographs (of a product). It is not permitted to use photographs of children without parental permission.

3.17 Amount of evidence needed

The amount of evidence per unit cannot be stipulated, as it depends on the type of evidence used and the strength/weight of each item. It is for the assessor, in discussion with the candidate, to judge when all learning outcomes, assessment criteria and evidence requirements have been met for unit sign-off.

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

OCR may accept some evidence from candidates who have been assessed in a language other than English, Welsh or Irish as long as there is enough evidence to show that candidates are competent in English, Welsh or Irish to the standard required for competent performance throughout the UK.

3.18 Cumulative assessment record (CAR)

To build a **Cumulative Assessment Record (CAR)**, candidates will need to fill in an evidence record sheet (or equivalent) for each unit. Compiling the CAR is an ongoing process involving discussion and agreement between the candidate and their assessor. The candidate should fill in and keep the CAR while working towards their qualification. An assessor may help the candidate complete the CAR if necessary.

As well as collecting evidence, candidates must record all their assessed evidence in their personal cumulative assessment record (CAR). The CAR is the candidate's record of what evidence has been accepted as proof of competence and where that evidence can be found. It can also be used to record progress towards, and achievement of units.

Templates are available for the recording documents to be used in a CAR and you will need to customise these for the qualification the candidate is taking. You may also design your own forms which must be approved during the approval visit or by our external verifier. The forms can be in any format but as a minimum they must contain the following information:

- the candidate's name and location
- the title and level of the qualification they are taking
- the candidate's start date on the programme and confirmation of candidate registration
- the name of the centre assessor
- the name of the internal quality assurance personnel
- the date and outcome of the initial assessment of the candidate
- dates and details of candidate reviews and feedback sessions
- assessment method(s) used

- dates of all assessments and their outcomes (that is, the decision whether the candidate has met the requirements or not) cross-referenced to the unit
- enough detail of the assessments to justify the decision made
- dates and outcomes of internal quality assurance
- action resulting from internal quality assurance
- candidate's achievement(s).

We have provided other forms and recording documents which assessors and candidates might want to use for these qualification(s) please see the OCR website www.ocr.org.uk.

3.19 Verification – how it works

Internal verification

It is the centre's responsibility to appoint an internal verifier to manage the internal verification process. The purpose of internal verification is to make sure and show that assessment is valid and consistent, through monitoring and sampling assessment decisions.

Internal verifiers must agree the use of simulated activities before they take place and must sample all evidence produced through simulated activities (see section 3.14 [Simulation](#)).

The role of the internal verifier is more fully explained in the OCR Administration area, <http://www.ocr.org.uk/administration/>.

External verification

OCR will allocate an external verifier who will visit the centre to verify assessments and internal verification.

External verifiers will want to interview candidates, assessors and internal verifiers during their visits. Assessment records and evidence for all candidates must also be available for verifiers to see if they ask to. It is the assessor's (and not the internal or external verifiers') responsibility to 'sign off' each unit of competence.

Centres should have the following available for each external verification visit:

- a list of candidates registered for these qualifications, together with their achievements to date plus certification records
- access to evidence (for example, up-to-date portfolios) and CARs
- access to OCR on-line claim system (Interchange)
- relevant assessors and selected candidates as requested by the external verifier (EV), including those whose certificates have been claimed through Direct Claims Status (DCS)
- all portfolios (access to evidence) relating to certificates claimed through DCS
- a copy of the external verifier's last visit report
- a sample signature list for all assessors and internal verifiers
- details of training and curriculum vitae for new members of the assessment team
- all centre records (see Centre records – assessment and verification for more details)

- evidence of achieving action points since the last external verifier visit
- notes of any action carried out due to particular points mentioned by an external verifier in any correspondence since their last visit
- recommendations to the external verifier
- if recorded evidence is used, ensure all recordings and appropriate playback equipment is available.

Centre records – assessment and verification

A centre must make sure that assessment and verification records are available for external verification purposes. Assessment and/or internal verification records must record the following minimum information:

- candidate's name and location
- the title and level of the qualification they are taking
- candidate's start date on the programme and confirmation of registration with OCR
- name of the assessor
- name of the internal verifier
- date and outcome of the initial assessment of the candidate
- dates and details of candidate reviews and feedback sessions
- dates of all assessments and their outcomes (that is, the decision whether the candidate has met the requirements or not) cross-referenced to the unit
- enough detail of the assessment to justify the decision made
- an indication of the use of simulation, if used
- dates and outcomes of internal verification
- action resulting from internal verification
- certification.

Records should show formative assessment decisions (ongoing decision making), summative assessment decisions and feedback to the candidate.

4 Assessor and Internal Verifier 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 are a sufficient number of people either trained or qualified to internally verify for the number of candidates and assessors
- put verification systems and internal verifiers in place to ensure that all assessments are valid, reliable, authentic and sufficient and provide quality assured training for those people identified as being responsible for verification
- ensure that there is a system of standardisation in place to ensure that all assessments are consistent and fair
- ensure that those undertaking the roles of verification and assessment maintain their skills, knowledge and understanding regarding assessment and verification and the associated qualification.

The occupational expertise of those undertaking the roles of assessment and internal verification is one of the key factors underpinning valid, fair and reliable assessment. The integrity of assessments and verifications is of paramount importance. Centres must ensure that there is sufficient time to conduct effective assessment and internal verification.

4.2 Assessor and Internal Verifier 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 or 3 National Occupational Standards for Customer Service appropriate to the Level the EV is working at, and the ability to interpret them across a wide variety of Customer Service environments
- experience and working knowledge of the operational and assessment processes of the Customer Service S/NVQ at the Level the EV is working at
- relevant and credible customer service experience across the level and breadth of the National Occupational Standards and S/NVQs at the Level the EV is working at
- knowledge of current customer service practice and emerging issues in the customer service arena
- high levels of communication and interpersonal skills.

The tables below show the requirements for the Occupational Competence of Assessors, Internal and External Verifiers for Level 1, 2 and 3. The table suggest ways in which evidence can be gained, however these are not compulsory and are a guide only. The tick boxes on the right show whether the evidence applies to Assessors (A), Internal Verifiers (IV) or External Verifier (EV).

Appendix A

The Assessor, IV and EV working at Level 1 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 1 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the CfA		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the CfA Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the CfA	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 1	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 1	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Appendix B

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the CfA		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the CfA Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the CfA	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 2	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Appendix C

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies, UKCES, Accreditation Bodies and the CfA		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the CfA Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the CfA	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 3	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVS and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

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

OCR Level 1 NVQ Certificate in Customer Service

OCR Level 2 NVQ Certificate in Customer Service

OCR Level 3 NVQ Diploma in Customer Service

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 OCR's Administration area for full details, <https://www.ocr.org.uk/administration/>.

5.2 Replacement certificates

For details on replacement certificates refer to the Administration area, certificates, <https://www.ocr.org.uk/administration/>.

5.3 Enquiries about results

Under certain circumstances, you may wish to query the result(s) issued to one or more candidates.

To find out more about this, please refer to the JCQ Post-Results Services booklet and the Administration area, post results services, <https://www.ocr.org.uk/administration/>.

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 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.

OCR Level 1 NVQ Certificate in Customer Service

Qualification Accreditation Number 500/9843/3

To achieve this qualification, candidates must achieve a total of 22 credits made up as follows:

- from mandatory Group A, candidates must achieve 8 credits
- from the optional groups, candidates must achieve 14 credits by completing a minimum of one unit from each optional group, a minimum of which 8 credits should be achieved at Level 1.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group A - Mandatory Units					
F1	Communicate using customer service language	F/601/1609	4	1	30
F2	Follow the rules to deliver customer service	L/601/1614	4	2	30
Optional Units					
Group B – Impression and Image					
A1	Maintain a positive and customer-friendly attitude	R/601/1209	5	1	33
A2	Adapt your behaviour to give a good customer service impression	L/601/1211	5	1	33
A3	Communicate effectively with customers	R/601/1212	5	2	33
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2	33
A5	Promote additional services or products to customers	D/601/0936	6	2	40
A6	Process information about customers	H/601/1215	5	2	33
A7	Live up to the customer service promise	M/601/1217	6	2	40
A8	Make customer service personal	T/601/1218	6	2	40
A9	Go the extra mile in customer service	M/601/1220	6	2	40
A10	Deal with customers face to face	T/601/1221	5	2	33
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2	33
A12	Make telephone calls to customers	J/601/1224	6	2	40

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group C – Delivery					
B1	Do your job in a customer-friendly way	A/601/1205	5	1	33
B2	Deliver reliable customer service	J/601/1210	5	2	33
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2	33
B4	Recognise diversity when delivering customer service	K/601/1216	5	2	33
B5	Deal with customers across a language divide	A/601/1219	8	2	53
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2	27
B7	Deal with customers using bespoke software	L/601/1225	5	2	33
B8	Maintain customer service through effective handover	Y/601/1227	4	2	27
Group D – Handling Problems					
C1	Recognise and deal with customer queries, requests and problems	M/601/1508	5	1	33
C2	Take details of customer service problems	T/601/1509	4	1	27
C3	Resolve customer service problems	M/601/1511	6	2	40
C4	Deliver customer service to difficult customers	T/601/1512	6	2	40

OCR Level 2 NVQ Certificate in Customer Service

Qualification Accreditation Number 500/8625/X

To achieve this qualification, candidates must achieve a total of 28 credits made up as follows:

- from mandatory Group A, candidates must achieve 8 credits
- from the optional groups, candidates must achieve 20 credits by completing a minimum of one unit from each optional group, of which a minimum 11 credits must be achieved at Level 2.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group A - Mandatory Units					
F1	Communicate using customer service language	F/601/1609	4	1	30
F2	Follow the rules to deliver customer service	L/601/1614	4	2	30
Optional Units					
Group B – Impression and Image					
A1	Maintain a positive and customer-friendly attitude	R/601/1209	5	1	33
A2	Adapt your behaviour to give a good customer service impression	L/601/1211	5	1	33
A3	Communicate effectively with customers	R/601/1212	5	2	33
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2	33
A5	Promote additional services or products to customers	D/601/0936	6	2	40
A6	Process information about customers	H/601/1215	5	2	33
A7	Live up to the customer service promise	M/601/1217	6	2	40
A8	Make customer service personal	T/601/1218	6	2	40
A9	Go the extra mile in customer service	M/601/1220	6	2	40
A10	Deal with customers face to face	T/601/1221	5	2	33
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2	33
A12	Make telephone calls to customers	J/601/1224	6	2	40
A13	Deal with customers in writing or electronically	R/601/1226	6	3	40
A14	Use customer service as a competitive tool	D/601/1228	8	3	53
A15	Organise the promotion of additional services or products to customers	D/601/1231	7	3	47
A16	Build a customer service knowledge set	K/601/1233	7	3	47
Group C – Delivery					
B1	Do your job in a customer-friendly way	A/601/1205	5	1	33
B2	Deliver reliable customer service	J/601/1210	5	2	33
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2	33
B4	Recognise diversity when delivering customer service	K/601/1216	5	2	33

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
B5	Deal with customers across a language divide	A/601/1219	8	2	53
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2	27
B7	Deal with customers using bespoke software	L/601/1225	5	2	33
B8	Maintain customer service through effective handover	Y/601/1227	4	2	27
B9	Deliver customer service using service partnerships	H/601/1229	6	3	40
B10	Organise the delivery of reliable customer service	Y/601/1230	6	3	40
B11	Improve the customer relationship	H/601/1232	7	3	47
Group D – Handling Problems					
C1	Recognise and deal with customer queries, requests and problems	M/601/1508	5	1	33
C2	Take details of customer service problems	T/601/1509	4	1	27
C3	Resolve customer service problems	M/601/1511	6	2	40
C4	Deliver customer service to difficult customers	T/601/1512	6	2	40
C5	Monitor and solve customer service problems	J/601/1515	6	3	40
C6	Apply risk assessment to customer service	D/601/1519	10	3	67
C7	Process customer service complaints	D/601/1522	6	3	40
Group E – Development and Improvement					
D1	Develop customer relationships	T/601/1526	6	2	40
D2	Support customer service improvements	A/601/1530	5	2	33
D3	Develop personal performance through delivering customer service	R/601/1534	6	2	40
D4	Support customers using on-line customer services	H/601/1540	5	2	33
D5	Buddy a colleague to develop their customer service skills	M/601/1542	5	2	33
D6	Develop your own customer service skills through self-study	R/601/1548	6	2	40
D7	Support customers using self-service technology	Y/601/1549	5	2	33
D8	Work with others to improve customer service	D/601/1553	8	3	53
D9	Promote continuous improvement	H/601/1554	7	3	47
D10	Develop your own and others' customer service skills	K/601/1555	8	3	53
D11	Lead a team to improve customer service	H/601/1568	7	3	47
D12	Gather, analyse and interpret customer feedback	H/601/1571	10	3	67
D13	Monitor the quality of customer service transactions	T/601/1574	7	3	47

OCR Level 3 NVQ Diploma in Customer Service

Qualification Accreditation Number 500/8626/1

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 of 10 credits must be achieved at Level 3.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group A - Mandatory Units					
F3	Demonstrate understanding of customer service	K/601/1622	6	3	40
F4	Demonstrate understanding of the rules that impact on improvements in customer service	J/601/1627	6	3	40
Optional Units					
Group B – Impression and Image					
A3	Communicate effectively with customers	R/601/1212	5	2	33
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2	33
A5	Promote additional services or products to customers	D/601/0936	6	2	40
A6	Process information about customers	H/601/1215	5	2	33
A7	Live up to the customer service promise	M/601/1217	6	2	40
A8	Make customer service personal	T/601/1218	6	2	40
A9	Go the extra mile in customer service	M/601/1220	6	2	40
A10	Deal with customers face to face	T/601/1221	5	2	33
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2	33
A12	Make telephone calls to customers	J/601/1224	6	2	40
A13	Deal with customers in writing or electronically	R/601/1226	6	3	40
A14	Use customer service as a competitive tool	D/601/1228	8	3	53
A15	Organise the promotion of additional services or products to customers	D/601/1231	7	3	47
A16	Build a customer service knowledge set	K/601/1233	7	3	47
A17	Champion customer service	T/601/1235	10	4	67
A18	Make customer service environmentally friendly and sustainable	F/601/1237	11	4	73

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
Group C – Delivery					
B2	Deliver reliable customer service	J/601/1210	5	2	33
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2	33
B4	Recognise diversity when delivering customer service	K/601/1216	5	2	33
B5	Deal with customers across a language divide	A/601/1219	8	2	53
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2	27
B7	Deal with customers using bespoke software	L/601/1225	5	2	33
B8	Maintain customer service through effective handover	Y/601/1227	4	2	27
B9	Deliver customer service using service partnerships	H/601/1229	6	3	40
B10	Organise the delivery of reliable customer service	Y/601/1230	6	3	40
B11	Improve the customer relationship	H/601/1232	7	3	47
B12	Maintain and develop a healthy and safe customer service environment	M/601/1234	8	4	53
B13	Plan, organise and control customer service operations	A/601/1236	10	4	67
B14	Review the quality of customer service	J/601/1238	8	4	53
B15	Build and maintain effective customer relations	L/601/1239	8	4	53
B16	Deliver seamless customer service with a team	F/601/1240	8	4	53
Group D – Handling Problems					
C3	Resolve customer service problems	M/601/1511	6	2	40
C4	Deliver customer service to difficult customers	T/601/1512	6	2	40
C5	Monitor and solve customer service problems	J/601/1515	6	3	40
C6	Apply risk assessment to customer service	D/601/1519	10	3	67
C7	Process customer service complaints	D/601/1522	6	3	40
C8	Handle referred customer complaints	K/601/1524	10	4	67
Group E – Development and Improvement					
D1	Develop customer relationships	T/601/1526	6	2	40
D2	Support customer service improvements	A/601/1530	5	2	33
D3	Develop personal performance through delivering customer service	R/601/1534	6	2	40
D4	Support customers using on-line customer services	H/601/1540	5	2	33
D5	Buddy a colleague to develop their customer service skills	M/601/1542	5	2	33
D6	Develop your own customer service skills through self-study	R/601/1548	6	2	40

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level	GLH
D7	Support customers using self-service technology	Y/601/1549	5	2	33
D8	Work with others to improve customer service	D/601/1553	8	3	53
D9	Promote continuous improvement	H/601/1554	7	3	47
D10	Develop your own and others' customer service skills	K/601/1555	8	3	53
D11	Lead a team to improve customer service	H/601/1568	7	3	47
D12	Gather, analyse and interpret customer feedback	H/601/1571	10	3	67
D13	Monitor the quality of customer service transactions	T/601/1574	7	3	47
D14	Implement quality improvements to customer service	L/601/1578	10	4	67
D15	Plan and organise the development of customer service staff	L/601/1581	9	4	60
D16	Develop a customer service strategy for a part of an organisation	M/601/1587	11	4	73
D17	Manage a customer service award programme	A/601/1592	7	4	47
D18	Apply technology or other resources to improve customer service	Y/601/1597	11	4	73
D19	Review and re-engineer customer service processes	R/601/1601	11	4	73
D20	Manage customer service performance	K/601/1605	7	4	47

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 Regulated Qualifications Framework level on which the unit is regulated.

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.

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/by-type/vocational-qualifications/customer-service/>

7 Recording Documentation

7.1 Recording assessment

OCR has provided a master evidence record sheet. When evidence is recorded on the evidence record sheet, assessors will be advised to identify the method that has been used to assess the evidence. OCR external verifiers will look for this information when verifying the NVQ.

7.2 Recording the method of assessment

The master evidence record sheet includes a box in which you must record the method of assessment. The following list shows the individual codes you should use when filling in these record sheets:

Method of assessment used	Code to be inserted on evidence reference sheet
Observation of the candidate by the assessor	O
Examination of the evidence by the assessor: Examination of a product Examination of the witness testimony Examination of a case history Examination of a personal statement Examination of written answers to questions	EP EWT ECH EPS EWQ
Questioning of the candidate or witness by the assessor: Questioning of the candidate Questioning of the witness	QC QW
Professional Discussion	PD
Simulated Activities	S

7.3 Recording documents

The following recording documents are included:

- Evidence record sheet
- Witness list
- Record of achievement

Evidence record sheet

This form (or a suitable alternative) is **mandatory** for candidates' Cumulative Assessment Record (CAR). It is the vehicle for linking evidence to the 'assessment criteria and evidence requirements'. The evidence for the unit should be listed (as it is collected) down the left-hand side. The assessment method should be indicated and then the relevant 'assessment criteria and evidence requirements' that the candidate is claiming should be selected from the appropriate column. The evidence record sheet, where possible, should be filled in by the candidate with the help of an assessor if necessary.

Witness List

This form is designed to capture all the necessary information about witnesses who have contributed to a candidate's evidence of competence. The use of this form is **optional**.

Record of achievement

This form is designed to record a candidate's progress through the qualification. It will show, at a glance, which units the assessor considers the candidate to have finished and met all the requirements for.

8 Guidance For Candidates

8.1 What are NVQs in Customer Service?

These qualifications aim to recognise candidates' achievements within customer service environments. For example:

1. provide accreditation for the interpersonal skills identified as critical for those intending to work in a customer service environment
2. prepare candidates for employment in a job that involves customer service
3. improve the essential knowledge, understanding and skills required for employment in a customer service role, whilst employed
4. update the knowledge skills and understanding of those already employed in a customer service role to improve their performance.

These qualifications are based on the Customer Service National Occupational Standards at Levels 1, 2 and 3 and are designed to certificate occupational competence at these levels. These qualifications incorporate a choice of optional units which will enable you to tailor the qualification/s to your needs.

8.2 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 1 NVQ Certificate in Customer Service

Qualification Number 500/9843/3

To achieve this qualification, you must achieve a total of 22 credits made up as follows:

- from mandatory Group A, you must achieve 8 credits
- from the optional groups, you must achieve 14 credits by completing a minimum of one unit from each optional group, a minimum of which 8 credits should be achieved at Level 1.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
F1	Communicate using customer service language	F/601/1609	4	1
F2	Follow the rules to deliver customer service	L/601/1614	4	2
A1	Maintain a positive and customer-friendly attitude	R/601/1209	5	1
A2	Adapt your behaviour to give a good customer service impression	L/601/1211	5	1
A3	Communicate effectively with customers	R/601/1212	5	2
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2
A5	Promote additional services or products to customers	D/601/0936	6	2
A6	Process information about customers	H/601/1215	5	2
A7	Live up to the customer service promise	M/601/1217	6	2
A8	Make customer service personal	T/601/1218	6	2
A9	Go the extra mile in customer service	M/601/1220	6	2
A10	Deal with customers face to face	T/601/1221	5	2
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2
A12	Make telephone calls to customers	J/601/1224	6	2
B1	Do your job in a customer-friendly way	A/601/1205	5	1
B2	Deliver reliable customer service	J/601/1210	5	2
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2
B4	Recognise diversity when delivering customer service	K/601/1216	5	2
B5	Deal with customers across a language divide	A/601/1219	8	2
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2
B7	Deal with customers using bespoke software	L/601/1225	5	2
B8	Maintain customer service through effective handover	Y/601/1227	4	2
C1	Recognise and deal with customer queries, requests and problems	M/601/1508	5	1
C2	Take details of customer service problems	T/601/1509	4	1
C3	Resolve customer service problems	M/601/1511	6	2
C4	Deliver customer service to difficult customers	T/601/1512	6	2

OCR Level 2 NVQ Certificate in Customer Service

Qualification Number 500/8625/X

To achieve this qualification, you must achieve a total of 28 credits made up as follows:

- from mandatory Group A, you must achieve 8 credits
- from the optional groups, you must achieve 20 credits by completing a minimum of one unit from each optional group, of which a minimum 11 credits must be achieved at Level 2.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
F1	Communicate using customer service language	F/601/1609	4	1
F2	Follow the rules to deliver customer service	L/601/1614	4	2
A1	Maintain a positive and customer-friendly attitude	R/601/1209	5	1
A2	Adapt your behaviour to give a good customer service impression	L/601/1211	5	1
A3	Communicate effectively with customers	R/601/1212	5	2
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2
A5	Promote additional services or products to customers	D/601/0936	6	2
A6	Process information about customers	H/601/1215	5	2
A7	Live up to the customer service promise	M/601/1217	6	2
A8	Make customer service personal	T/601/1218	6	2
A9	Go the extra mile in customer service	M/601/1220	6	2
A10	Deal with customers face to face	T/601/1221	5	2
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2
A12	Make telephone calls to customers	J/601/1224	6	2
A13	Deal with customers in writing or electronically	R/601/1226	6	3
A14	Use customer service as a competitive tool	D/601/1228	8	3
A15	Organise the promotion of additional services or products to customers	D/601/1231	7	3
A16	Build a customer service knowledge set	K/601/1233	7	3
B1	Do your job in a customer-friendly way	A/601/1205	5	1
B2	Deliver reliable customer service	J/601/1210	5	2
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2
B4	Recognise diversity when delivering customer service	K/601/1216	5	2
B5	Deal with customers across a language divide	A/601/1219	8	2
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2
B7	Deal with customers using bespoke software	L/601/1225	5	2
B8	Maintain customer service through effective handover	Y/601/1227	4	2

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
B9	Deliver customer service using service partnerships	H/601/1229	6	3
B10	Organise the delivery of reliable customer service	Y/601/1230	6	3
B11	Improve the customer relationship	H/601/1232	7	3
Group D – Handling Problems				
C1	Recognise and deal with customer queries, requests and problems	M/601/1508	5	1
C2	Take details of customer service problems	T/601/1509	4	1
C3	Resolve customer service problems	M/601/1511	6	2
C4	Deliver customer service to difficult customers	T/601/1512	6	2
C5	Monitor and solve customer service problems	J/601/1515	6	3
C6	Apply risk assessment to customer service	D/601/1519	10	3
C7	Process customer service complaints	D/601/1522	6	3
D1	Develop customer relationships	T/601/1526	6	2
D2	Support customer service improvements	A/601/1530	5	2
D3	Develop personal performance through delivering customer service	R/601/1534	6	2
D4	Support customers using on-line customer services	H/601/1540	5	2
D5	Buddy a colleague to develop their customer service skills	M/601/1542	5	2
D6	Develop your own customer service skills through self-study	R/601/1548	6	2
D7	Support customers using self-service technology	Y/601/1549	5	2
D8	Work with others to improve customer service	D/601/1553	8	3
D9	Promote continuous improvement	H/601/1554	7	3
D10	Develop your own and others' customer service skills	K/601/1555	8	3
D11	Lead a team to improve customer service	H/601/1568	7	3
D12	Gather, analyse and interpret customer feedback	H/601/1571	10	3
D13	Monitor the quality of customer service transactions	T/601/1574	7	3

OCR Level 3 NVQ Diploma in Customer Service

Qualification Number 500/8626/1

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

- from mandatory Group A, you must achieve 12 credits.
- from the optional groups, you must achieve 30 credits by completing a minimum of one unit from each optional group from which 10 credits must be achieved at Level 3.

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

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
F3	Demonstrate understanding of customer service	K/601/1622	6	3
F4	Demonstrate understanding of the rules that impact on improvements in customer service	J/601/1627	6	3
Optional Units				
Group B – Impression and Image				
A3	Communicate effectively with customers	R/601/1212	5	2
A4	Give customers a positive impression of yourself and your organisation	L/601/0933	5	2
A5	Promote additional services or products to customers	D/601/0936	6	2
A6	Process information about customers	H/601/1215	5	2
A7	Live up to the customer service promise	M/601/1217	6	2
A8	Make customer service personal	T/601/1218	6	2
A9	Go the extra mile in customer service	M/601/1220	6	2
A10	Deal with customers face to face	T/601/1221	5	2
A11	Deal with incoming telephone calls from customers	F/601/1223	5	2
A12	Make telephone calls to customers	J/601/1224	6	2
A13	Deal with customers in writing or electronically	R/601/1226	6	3
A14	Use customer service as a competitive tool	D/601/1228	8	3
A15	Organise the promotion of additional services or products to customers	D/601/1231	7	3
A16	Build a customer service knowledge set	K/601/1233	7	3
A17	Champion customer service	T/601/1235	10	4
A18	Make customer service environmentally friendly and sustainable	F/601/1237	11	4
Group C – Delivery				
B1	Do your job in a customer-friendly way	A/601/1205	5	1
B2	Deliver reliable customer service	J/601/1210	5	2
B3	Deliver customer service on your customer's premises	Y/601/1213	5	2
B4	Recognise diversity when delivering customer service	K/601/1216	5	2
B5	Deal with customers across a language divide	A/601/1219	8	2

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
B6	Use questioning techniques when delivering customer service	A/601/1222	4	2
B7	Deal with customers using bespoke software	L/601/1225	5	2
B8	Maintain customer service through effective handover	Y/601/1227	4	2
B9	Deliver customer service using service partnerships	H/601/1229	6	3
B10	Organise the delivery of reliable customer service	Y/601/1230	6	3
B11	Improve the customer relationship	H/601/1232	7	3
B12	Maintain and develop a healthy and safe customer service environment	M/601/1234	8	4
B13	Plan, organise and control customer service operations	A/601/1236	10	4
B14	Review the quality of customer service	J/601/1238	8	4
B15	Build and maintain effective customer relations	L/601/1239	8	4
B16	Deliver seamless customer service with a team	F/601/1240	8	4
Group D – Handling Problems				
C3	Resolve customer service problems	M/601/1511	6	2
C4	Deliver customer service to difficult customers	T/601/1512	6	2
C5	Monitor and solve customer service problems	J/601/1515	6	3
C6	Apply risk assessment to customer service	D/601/1519	10	3
C7	Process customer service complaints	D/601/1522	6	3
C8	Handle referred customer complaints	K/601/1524	10	4
Group E – Development and Improvement				
D1	Develop customer relationships	T/601/1526	6	2
D2	Support customer service improvements	A/601/1530	5	2
D3	Develop personal performance through delivering customer service	R/601/1534	6	2
D4	Support customers using on-line customer services	H/601/1540	5	2
D5	Buddy a colleague to develop their customer service skills	M/601/1542	5	2
D6	Develop your own customer service skills through self-study	R/601/1548	6	2
D7	Support customers using self-service technology	Y/601/1549	5	2
D8	Work with others to improve customer service	D/601/1553	8	3
D9	Promote continuous improvement	H/601/1554	7	3
D10	Develop your own and others' customer service skills	K/601/1555	8	3
D11	Lead a team to improve customer service	H/601/1568	7	3
D12	Gather, analyse and interpret customer feedback	H/601/1571	10	3
D13	Monitor the quality of customer service transactions	T/601/1574	7	3

Unit No	Unit title	Unit Accreditation No (UAN)	Credit value	Level
D14	Implement quality improvements to customer service	L/601/1578	10	4
D15	Plan and organise the development of customer service staff	L/601/1581	9	4
D16	Develop a customer service strategy for a part of an organisation	M/601/1587	11	4
D17	Manage a customer service award programme	A/601/1592	7	4
D18	Apply technology or other resources to improve customer service	Y/601/1597	11	4
D19	Review and re-engineer customer service processes	R/601/1601	11	4
D20	Manage customer service performance	K/601/1605	7	4

8.3 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.

8.4 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.

8.5 How are the units assessed?

Like all NVQs, this qualification is competence-based which means all of the units are assessed through a best mix of training, assessment and observation to fulfil the requirements of the NVQ. Your assessor will work with you to decide on the most appropriate way to collect evidence during the course of your normal work. There are no exams for these qualifications.

8.6 Do I need to pass all of the units?

The units that need to be passed in order to achieve a full NVQ in Customer Service are detailed in [section 8.2](#). However, each unit represents a worthwhile achievement in its own right, and certification is also available at unit level.

8.7 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).

8.8 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 the functional skills assessment.

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

9 Support and other information

9.1 Useful documents and links

OCR's Administration area <http://www.ocr.org.uk/administration/>

[What is malpractice?](#)

JCQ Publications at <http://www.jcq.org.uk>

Access Arrangements and Reasonable Adjustments

Suspected Malpractice in Examinations and Assessments

Ofqual at <http://ofqual.gov.uk/how-we-regulate/regulatory-documents/>

9.2 Our professional development programme (CPD)

As part of our teacher training we offer a broad range of courses. We're constantly looking for ways to improve the support we offer you and to make our professional development programme more accessible and convenient to all.

To find out more about professional development, please visit our website.

9.3 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) in Customer Service.

10 Contacting us

10.1 Feedback and enquiries

We aim to provide consistently great customer service and your feedback is invaluable in helping us to achieve our goal. For questions about our qualifications, products and services, please contact the [Customer Support Centre](#). To leave your feedback on the OCR website, people and processes please use our [feedback form](#).

Write to: Customer Support Centre
OCR
Progress House
Westwood Way
Coventry
CV4 8JQ

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

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

10.2 Complaints

We are committed to providing a high quality service but understand that sometimes things can go wrong. We welcome your comments and want to resolve your complaint as efficiently as possible. To make a complaint please follow the process set out on our [website](#).

11 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