

Unit Title:	Follow the rules to deliver customer service
Unit number	F2
Level:	2
Credit value:	4
Guided learning hours:	30

Unit purpose and aim

This unit requires the learner to understand the rules that apply to customer service delivered by their organisation and how they apply to the learner and their job.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Follow their organisation's customer service practices and procedures</p>	<p>The Learner can:</p> <p>1.1 Follow organisational practices and procedures that relate to their customer service work</p> <p>1.2 Recognise the limits of what they are allowed to do when delivering customer service</p> <p>1.3 Refer to somebody in authority when they need to</p> <p>1.4 Work in a way that protects the security of customers and their property</p> <p>1.5 Work in a way that protects the security of information about customers</p>	<p>Candidates should have an understanding of:</p> <ul style="list-style-type: none"> • The internal procedures and instructions relating to their job role to include: <ul style="list-style-type: none"> - Time management - Targets - Rules of conduct - Personal appearance - Appropriate use of equipment - Awareness of complaint's procedure, customer charter, mission statement • How to follow the internal procedures and instructions by demonstrating: <ul style="list-style-type: none"> - Positive attitude - Appropriate verbal and written communication - Appropriate body language - Appropriate behaviour - Knowledge of products and/or services

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<ul style="list-style-type: none"> • Limitations to their authority e.g.: <ul style="list-style-type: none"> - Exchanges - Refunds - Discounts - Returns - Specialist knowledge - Complaints - Health and safety issues - Special orders • And who to refer to e.g.: <ul style="list-style-type: none"> - Experienced colleague - Supervisor - Manager - Specialist • Legislation e.g.: <ul style="list-style-type: none"> - Health and Safety at Work Act - Management of Health and Safety at Work Regulations - RIDDOR - COSHH - DSE Regulations - Noise at Work Regulations - Manual Handling Regulations - Safety Signs Regulations - PPE Regulations • The difference between a hazard and a risk, the types of hazards and action needed to control the associated risk • The importance of following health and safety legislation e.g.: <ul style="list-style-type: none"> - Financial consequences - Legal consequences - Welfare of customers and employees - Damage to reputation

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<ul style="list-style-type: none"> • The Data Protection Act 2003 including: <ul style="list-style-type: none"> - The importance to their customers - The organisational procedures that are in place - The limits to their responsibility - Who to refer to
<p>2 Know how to follow the rules to deliver customer service</p>	<p>2.1 Describe organisational practices and procedures that relate to their customer service work</p> <p>2.2 Identify the limits of what they are allowed to do when delivering customer service</p> <p>2.3 Explain when and how they should refer to somebody in authority about the rules for delivering customer service</p> <p>2.4 Explain how they protect the security of customers and their property</p> <p>2.5 Explain how they protect the security of information about customers</p> <p>2.6 Describe their health and safety responsibilities as they relate to their customer service work</p> <p>2.7 Explain their responsibilities to deliver customer service treating customers equally</p> <p>2.8 Explain why it is important to respect customer and organisation confidentiality</p> <p>2.9 List the main things they must do and not do in their job under legislation that affects their customer service work</p> <p>2.10 List the main things that they must do and not do in their job under external regulations that affect their customer service work</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • The procedures and practices relating to customer service • The limits of their responsibility and who to refer to <p>Candidates must have an understanding of legislation and regulations that applies to their role associated with customer service to include:</p> <ul style="list-style-type: none"> • Equal opportunities • Disability discrimination • Data protection • Employment rights and responsibilities • Consumer protection • Any other sector-specific legislation, regulation or code of practice <p>Candidates must have an understanding of how the legislation/regulations:</p> <ul style="list-style-type: none"> • Are important to the customer • Effects organisational procedures • The limits of their responsibilities • Who they would refer to

Assessment

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

Evidence requirements

1. Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook which can be downloaded from the OCR website: www.ocr.org.uk*).
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
5. You must provide evidence of following the rules to deliver customer service:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down

Guidance on assessment and evidence requirements

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

National Occupational Standards (NOS) mapping/signposting

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

Additional information

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