

Customer Service

Level 2 Level 3 Level 4

Scheme Codes 05943 05944 05945

What is an NVQ?

An NVQ (National Vocational Qualification) is a qualification that assesses someone's competence (that is the skills, knowledge and understanding they have) within a work situation. NVQs are based on the national occupational standards that describe the level and breadth of performance expected of individuals whose work involves Customer Service practices. These NVQs are based on the national occupational standards developed by the Institute of Customer Service (ICS). They are the government approved body who set the standards for the Customer Service sector.

The awarding body for these NVQs is Oxford Cambridge and RSA Examinations (OCR) and the regulatory body is the Qualifications and Curriculum Authority (QCA).

These qualifications have been accepted by QCA for inclusion in the National Qualifications Framework (NQF).

Who are these NVQs for?

The OCR Level 2 NVQ 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 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 supervision 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

The OCR Level 4 NVQ in Customer Service is aimed at candidates working in a senior role within an organisation that treats customer service as a priority. The candidate does not have to be a line manager of other people or even have manager as part of the title; however they should hold a position that would allow them to influence decision making and shape how customer service is delivered inside or outside of the organisation.

It is suitable for candidates who:

- have a role that is clearly linked to customer service, for example, customer service managers, customer service team leaders or people who have significant responsibility for operations, staff and other resources
- who may have a general management type job that includes some aspects of customer service
- are consultants or specialists who have responsibility for a particular aspect of the business which impacts directly on customer service, such as IT.

These NVQs are work-orientated qualifications and are suitable for those who have current real work experience. They are open to candidates of any age, of either gender and there are no entry barriers on grounds of race, creed or previous academic attainment or learning.

What is its purpose?

The objective of these qualifications is to reflect the work of candidates who undertake Customer Service activities at Levels 2, 3 or 4.

They provide a statement of competence that testifies to the ability of candidates to work to meet customer objectives. They cover support systems, processes and services and recognise that employment in Customer Service involves a diverse range of functions, tasks and activities that are constantly developing in the light of changing customer needs.

These NVQs assess a candidate's competence against the national occupational standards for Customer Service at Levels 2, 3 and 4. Candidates must prove they are competent in a wide range of activities.

What are the benefits of these NVQs?

Employees will benefit from:

- A clearer understanding of their responsibility within their organisation
- The opportunity to develop new skills
- The recognition of existing skills

Employers will benefit from:

- Improved staff performance and motivation
- Improvements in the quality of service to customers
- The opportunity to ensure levels of service are to national standard

- Improvements in the quality and service provided

What are the structures of these NVQs?

To achieve a full **OCR Level 2 NVQ in Customer Service**, candidates must achieve 7 units made up of 2 mandatory units and 5 optional units, at least one unit from each theme.

This qualification contains 3 units that can be brought forward from Level 1; all three units can be claimed towards a Level 2 qualification.

This qualification contains 5 units that can be carried forward to Level 3; from these, a maximum of 3 units may be claimed towards a Level 3 qualification.

To achieve a full **OCR Level 3 NVQ in Customer Service**, candidates must achieve 8 units made up of 2 mandatory units and 6 optional units, at least one unit from each theme.

This qualification contains 5 units that can be brought forward from Level 2; from these a maximum of 3 units may be claimed towards a Level 3 qualification.

This qualification contains 5 units that can be carried forward to Level 4; all of these can be claimed towards a Level 4 qualification.

To achieve a full **OCR Level 4 NVQ in Customer Service**, candidates must achieve 9 units made up of 2 mandatory units and 7 optional units, at least one unit from each theme.

This qualification contains 5 units that can be brought forward from Level 3; all of these can be claimed towards a Level 4 qualification.

NVQ units of competence

OCR Level 2 NVQ in Customer Service

Mandatory units

- 1 Prepare yourself to deliver good customer service
- 5 Provide customer service within the rules

Optional units

Theme: Impression and Image

- 9 Give customers a positive impression of yourself and your organisation
- 10 Promote additional services or products to customers
- 11 Process customer service information
- 12 Live up to the customer service promise
- 13 Make customer service personal
- 14 Go the extra mile in customer service
- 15 Deal with customers in writing or using ICT
- 16 Deal with customers face to face
- 17 Deal with customers by telephone

Theme: Delivery

- 21 Deliver reliable customer service
- 22 Deliver customer service on your customer's premises

23 Recognise diversity when delivering customer service

Theme: Handling Problems

6 Recognise and deal with customer queries, requests and problems

31 Resolve customer service problems

Theme: Development and Improvement

36 Develop customer relationships

37 Support customer service improvements

38 Develop personal performance through delivering customer service

OCR Level 3 NVQ in Customer Service

Mandatory units

7 Understand customer service to improve service delivery

8 Know the rules to follow when developing customer service

Optional units

Theme: Impression and Image

13 Make customer service personal

14 Go the extra mile in customer service

15 Deal with customers in writing or using ICT

18 Use customer service as a competitive tool

19 Organise the promotion of services or products to customers

Theme: Delivery

22 Deliver customer service on your customer's premises

23 Recognise diversity when delivering customer service

24 Deliver customer service using service partnerships

25 Organise the delivery of reliable customer service

26 Improve the customer relationship

Theme: Handling Problems

32 Monitor and solve customer service problems

33 Apply risk assessment to customer service

34 Process customer service complaints

Theme: Development and Improvement

39 Work with others to improve customer service

40 Promote continuous improvement in customer service

41 Develop your own and others' customer service skills

42 Lead a team to improve customer service

43 Gather, analyse and interpret customer feedback

OCR Level 4 NVQ in Customer Service

Mandatory units

7 Understand customer service to improve service delivery

8 Know the rules to follow when developing customer service

Optional units

Theme: Impression and Image

18 Use customer service as a competitive tool

20 Champion Customer Service

Theme: Delivery

27 Maintain and develop a healthy and safe customer service environment

28 Plan, organise and control customer service operations

29 Evaluate the quality of customer service

30 Build and maintain effective customer relations

Theme: Handling Problems

33 Apply risk assessment to customer service

35 Handle referred customer complaints

Theme: Development and Improvement

42 Lead a team to improve customer service

44 Implement quality improvements to customer service

45 Plan and organise the development of customer service staff

46 Develop a customer service strategy for an area

47 Work as a member of a team to deliver seamless customer service

48 Manage a customer service award programme

Who is involved in the delivery of these NVQs?

Assessment centre

Any organisation, whether it is a place of employment, college or private training organisation can be approved to offer these qualifications, as long as it meets the criteria set out in the OCR publication 'Administrative Guide to Verified Qualifications' (reference code L526). This includes being able to provide suitably occupationally competent assessors and internal verifiers.

Once approved, an **assessment centre** will register candidates for the NVQ and allocate each candidate an **assessor** or **assessors**.

Trainer

The trainer will develop a candidate's knowledge, understanding and skills in relation to the NVQ that is being undertaken.

Trainers will:

- provide opportunities for learning
- provide ongoing mentoring to the candidate, including review and feedback on learning experiences and development of competence
- provide opportunities for a candidate to practice what they have learnt in a realistic, but safe and protected, working environment or, where this is not appropriate, in a simulated environment.

Assessor

The assessor will judge the evidence of a candidate's performance, knowledge and understanding against the units of competence in order to decide whether the candidate has demonstrated competence. The assessor will have suitable and reliable experience and be trained and qualified as an NVQ assessor. The criteria for appointing assessors are set out in the section **assessor and internal verifier requirements**. An assessor may be a candidate's line manager, a tutor at college, or someone specially appointed to this role. Assessments may also be carried out by a team of assessors.

The roles of trainer and assessor are inextricably linked and may be carried out by the same person, however, training activities must be clearly separated from assessment and only assessed evidence of competence should be presented as evidence towards the NVQ. The roles of assessor and trainer must be separate and preferably, where an individual has advised on a candidate's development they should not be that candidate's only assessor.

Internal verifier

Each assessor's work must be checked and confirmed by an **internal verifier** who is also a member of the staff of the assessment centre. The criteria for appointing internal verifiers are set out in the section **assessor and internal verifier requirements**. The internal verifier checks and standardises assessment decisions made by the assessors in the centre.

External verifier

The **external verifier** checks the assessment and internal verification decisions and processes made in the centre and authorises the claims for certificates. The external verifier is appointed by OCR.

How are these NVQs assessed?

Like all NVQs, these qualifications are **competence-based**. This means that they are linked to a person's ability to competently perform a range of tasks connected with their work.

To gain these NVQs a candidate must achieve the level of competence described in the NVQ units of competence. The units of competence contain the national occupational standards for Customer Service NVQs at Level 2, 3 and 4.

What are the important assessment requirements for these NVQs?

Simulation

Simulation is defined 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. Only units 1, 5 and 6 can be assessed via the use of simulated activities. The requirement and guidelines on this will be detailed in the centre handbook.

Assessor and Internal Verifier Requirements

The following criteria/tables have been developed by Standards Setting Body, the Institute of Customer Service and should be viewed as a minimum.

Where do Key Skill units fit in?

The evidence produced for the Customer Service NVQs may also prove the skills required for the Key Skills units up to Level 4.

Individual Key Skills units are available in the following six areas:

- Communication
- Application of Number
- Information Technology
- Personal skills – working with others
- Personal skills – improving own learning and performance
- Problem solving

For more information on Key Skills contact the OCR Customer Contact Centre on (024) 7685 1509, e-mail vocational.qualifications@ocr.org.uk

Is a Modern Apprenticeship Framework Available?

For information on Apprenticeships in this area contact:

The Institute of Customer Service (ICS)

Telephone: 0208 336 1686

Website: www.instituteofcustomerservice.com

| The Assessors and IV's working at Level 2 must have: | | This can be evidenced by: | A | IV |
|---|---|--|----------|-----------|
| 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 Bodies, DfES and Accreditation Bodies and the ICS | | ✓ |
| | | explaining the differences between the 4 UK Countries | ✓ | ✓ |
| 3. | Knowledge of current practice and emerging issues and changes in Customer Service across organisation 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 ICS Website for new developments | ✓ | ✓ |
| | | keeping up to date with media news regarding Customer Service | ✓ | ✓ |
| | | joining the ICS | ✓ | ✓ |
| 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 5. | 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 demonstrating at least 1 years experience of delivering Customer Service as part of their job | ✓ | ✓ |
| | | demonstrating at least 2 years experience of delivering Customer Service as part of their job | | |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE. | producing certificates or evidence of working towards these units | ✓ | ✓ |
| 7. | Demonstrated high levels of communication and interpersonal skills | gathering feedback from candidates, employers or peers | ✓ | ✓ |

| The Assessors and IV's working at Level 3 must have: | | This can be evidenced by: | A | IV |
|---|---|--|----------|-----------|
| 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 Bodies, DfES and Accreditation Bodies and the ICS | | ✓ |
| | | 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 ICS Website for new developments | ✓ | ✓ |
| | | keeping up to date with media news regarding Customer Service | ✓ | ✓ |
| | | joining the ICS | ✓ | ✓ |
| 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 5. | 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 | | |
| | | demonstrating at least 2 year's experience of delivering Customer Service as part of their job | ✓ | ✓ |
| | | demonstrating at least 3 year's experience of delivering Customer Service as part of their job | | |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE. | producing certificates or evidence of working towards these units | ✓ | ✓ |
| 7. | Demonstrated high levels of communication and interpersonal skills | gathering feedback from candidates, employers or peers | ✓ | ✓ |

| The Assessors and IV's working at Level 4 must have: | | This can be evidenced by: | A | IV |
|---|---|--|----------|-----------|
| 1. | A thorough understanding of the National Occupational Standards in Customer Service at Level 4 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 Bodies, DfES and Accreditation Bodies and the ICS | | ✓ |
| | | 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 ICS Website for new developments | ✓ | ✓ |
| | | keeping up to date with media news regarding Customer Service | ✓ | ✓ |
| | | joining the ICS | ✓ | ✓ |
| 4. | Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 4 | 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 | ✓ | ✓ |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 5. | Relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 4 | gathering feedback from a variety of employers and centres | | |
| | | demonstrating at least 1 years experience of delivering Customer Service as part of their job | ✓ | ✓ |
| | | demonstrating at least 4 years experience of delivering Customer Service as part of their job | | |
| | | responding appropriately to ICS recommended questions | ✓ | ✓ |
| 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 be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE. | producing certificates or evidence of working towards these units | ✓ | ✓ |
| 7. | Demonstrated high levels of communication and interpersonal skills | gathering feedback from candidates, employers or peers | ✓ | ✓ |

What to do next?

To seek approval to offer the qualification(s), please apply on-line following the step-by-step guide to applying for approval for vocational qualifications indicated on our 'Centre Approval' webpage.

You might be interested to know that OCR staff are available to help with any aspect of setting up a vocational assessment centre. Through an advisory telephone call or a centre visit, we can assist, not only with the completion of the form, but also provide advice on the following areas:

- identifying potential candidates and marketing opportunities
- meeting OCR requirements
- identifying resourcing levels, both in terms of staff and equipment
- the documents you might need for the benefit of the candidates and a smooth running centre operation

For further information, please get in touch with our **Customer Contact Centre** by phone: **(024 7685 1509)**; email: **vocational.qualifications@ocr.org.uk**; or in writing: **OCR Customer Contact Centre, OCR, Westwood Way, Coventry, CV4 8JQ.**

A summary of how the approval process works is provided in our **Admin Guide for Vocational Qualifications** (publication ref. code: A850). Our **Fees List** contains the charges for centre evaluation, candidate entries and certification. Both documents are available to download from our website **www.ocr.org.uk**

What other related OCR qualifications are available?

OCR offers a range of qualifications relevant to Customer Service NVQs:

| | General Qualifications | Vocationally-related Qualifications | Occupational Qualifications |
|----------------|---|---|---|
| Level 1 | GNVQ Foundation in Business | Customer Service OCR Nationals Certificate in Preparation for Employment, Certificate in Career Planning | Administration Customer Service Retail |
| Level 2 | GNVQ Intermediate in Business | Customer Service Certificate in Preparation for Employment Certificate in Career Planning OCR Nationals - Business | Administration Customer Service Retail Advice and Guidance Support |
| Level 3 | VCE Business includes Customer Service optional unit | Customer Service OCR National – Business | Administration Customer Service Retail Advice and Guidance |
| Level 4 | | | Customer Service Admin Advice and Guidance |

www.ocr.org.uk

OCR customer contact centre

Vocational qualifications

Telephone 024 76 851509

Facsimile 024 76 851633

Email vocational.qualifications@ocr.org.uk

General qualifications

Telephone 01223 553998

Facsimile 01223 552627

Email general.qualifications@ocr.org.uk

OCR

1 Hills Road, Cambridge CB1 2EU

Telephone 01223 552552

Facsimile 01223 553377



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