

# SKILLS FOR BUSINESS

## STUDENT GUIDE

LEVEL 2 NVQ CERTIFICATE IN CUSTOMER  
SERVICE (03455)

Within the Apprenticeship Framework for

# Customer Service

SKILLS FOR  
BUSINESS

OCR 

# STUDENT GUIDE

## INTRODUCTION

You are about to start the OCR Level 2 NVQ Certificate in Customer Service. We wish you every success and hope that this will be one of many OCR qualifications which you take throughout your life.

This guide has been designed to give you information about:

- the aims and structure of your qualification
- the people who will be involved in your qualification and what they will do
- the assessment process you will go through in order to gain your qualification
- the evidence you have to produce to show you can work to the required standards
- any extra forms you will use to help you



# ARE YOU STUDYING THIS QUALIFICATION AS PART OF AN APPRENTICESHIP FRAMEWORK?

The framework describes the qualifications that an apprentice has to achieve to successfully complete an Apprenticeship in Customer Service.

The components in this Apprenticeship are:

| COMPETENCE                                  | TECHNICAL KNOWLEDGE                                   | KEY SKILLS/<br>FUNCTIONAL SKILLS/<br>ESSENTIAL SKILLS<br>WALES                                 | EMPLOYMENT RIGHTS<br>AND RESPONSIBILITIES                                  | PERSONAL LEARNING<br>AND THINKING SKILLS   |
|---|---|--|--|--|
| Level 2 NVQ Certificate in Customer Service | Level 2 Certificate in Principles of Customer Service | Application of Number Level 1 Communications Level 1<br>or<br>Maths Level 1<br>English Level 1 | Delivered through Skills CfA Employer Rights and Responsibilities workbook | Personal Learning and Thinking Skills has been mapped where evidence is naturally occurring through the mandatory units of competence. Skills CfA has provided guidance on how further evidence can be obtained through completion of the units.<br><a href="http://www.skillsdfa.org/apprenticeships/resources.html">www.skillsdfa.org/apprenticeships/resources.html</a> |

This qualification satisfies the competence required to complete an Apprenticeship in Customer Service.

# ABOUT THIS QUALIFICATION

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).

## Qualification aims

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.

## Qualification structure

The national occupational standards for your qualification have been grouped into the main activities which make up a job. These groups of activities are called units. There are two types of units:

- **Mandatory units** – you will have to achieve all of these to get your qualification. You will also have to achieve some optional units
- **Optional units** – you will be able to choose from a number of optional units. You will receive help to choose the best optional units to match your job or interests.

Each unit has:

- **a unit aim** - this explains what the unit is all about and relates the unit content to typical tasks you may carry out
- **learning outcomes** - these set out what you are expected to know, understand or be able to do as a result of the learning process
- **assessment criteria** - these detail the requirements that you will be assessed against in order to evidence the learning outcomes
- **evidence requirements** - these detail the context in which the learning outcomes and assessment criteria should be met.



# WHO WILL BE INVOLVED IN YOUR QUALIFICATION

Assessment of your qualification is carried out at your centre. Your centre may be your place of work, a college, training agency or combination of these. The people involved in the assessment process are listed below.

An **assessor** (this may be your manager or supervisor at work) will:

- help you plan and organise your workload and evidence
- provide feedback and offer advice
- examine your portfolio of evidence
- observe you carrying out your job over a period of time
- ask you questions about the work you do
- judge when you are competent and meet the national standards.

An **internal verifier**:

- is employed by your centre to maintain the quality of assessment within the centre
- will visit your place of work to see you being assessed and may wish to speak with you
- will check the assessment of your portfolio of evidence
- will check your assessor is following correct assessment procedures.

An **external verifier**:

- is contracted by OCR to ensure that your centre meets the required national standard
- will make visits to your centre to observe assessment and examine evidence in portfolios
- may wish to speak with you as part of this process
- will check the centre is following the correct assessment and verification procedures.

## Witnesses

These are normally people in your workplace who regularly see you doing your job and know how your job should be done. As you plan your assessment with your assessor you will be asked to think about who these people are. They may be your supervisor or line manager.



# ASSESSMENT

In order for you 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 criterion are fully addressed.

When your assessor is satisfied that you have 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.

## Initial assessment

Before you begin this qualification, you must have received some form of initial assessment. Initial assessment determines your starting point. It identifies any competence or knowledge you already have, and also shows where there are any gaps in your competencies and knowledge. Initial assessment is undertaken to help plan your progress through this qualification because it allows your assessor to help you understand the best place to start collecting evidence. It will also identify units which you might have difficulty finishing.

Your assessor will spend time with you at the start of your programme making sure that you:

- are taking the right level of qualification
- understand which mandatory units you have to take
- have chosen the optional units you want to take
- understand what you need to know or learn to gain the qualification
- understand what you have to do to collect evidence to show that you are competent
- agree an assessment plan
- agree and sign a learning contract.

Your assessor will agree a number of issues with you including:

- finding the best source of evidence to use for particular units
- finding the best way of assessing you
- confirming the best times, dates and places for the assessments to take place.

Your assessor will make a note of their assessment planning and regularly give you feedback.

With your assessor you will make and agree an assessment plan. This will show:

- the units the plan covers
- when you will be observed
- where you will be observed
- what you will be doing
- what evidence you will produce.

Your assessor will be looking to find tasks which you do at work which will produce evidence for more than one unit. You may be able to produce evidence for more than one unit at a time.

The assessment plan is very important as it will help you prepare for the assessment. You may need to agree with other people when you are to be assessed, especially if you work in a team. You must let your supervisor or manager know so that, as far as possible, your work does not change on the day the assessment is planned.

Each time you prepare with your assessor for an assessment in your workplace, you will make an assessment plan. You will review, update and amend your plan many times as you progress through your qualification. This is called the assessment planning cycle.

## Assessment evidence

There are various assessment methods that can be used as evidence for this qualification. These will be explained in more detail in the next section of this guide.

## Assessment feedback

Your assessor will give you specific feedback on your performance after assessment. You will also meet regularly to review your progress and evidence, and update your assessment plan.

## Assessment decisions

When you think you have completed a unit, your assessor will make the final assessment decision. Remember that you must provide enough evidence to meet all the criteria in every unit you are claiming. You must meet all of the learning outcomes, assessment criteria and evidence requirements.

Your assessor's decision will be either

- that you are competent or
- that you are not yet competent.

If you are not yet competent, you and your assessor will return to the assessment planning cycle and decide how you can collect further evidence.



# RECORDING EVIDENCE

It has been agreed that the following assessment methods are most suitable for this qualification:

- **direct observation** of practice by an assessor or by the expert witness for occupational specific units
- **examination** of evidence by an assessor
- **questioning** by an assessor
- inference of **knowledge** from direct observation
- professional **discussion** with an assessor.

In some situations, the assessor may speak to you to provide evidence of your performance and knowledge (see **Professional discussion**).

## Direct observation of practice

Direct observation is where the assessor watches what you are doing. They check your practice against the assessment criteria to determine if you are meeting the given standard.

You and your assessor should plan direct observations of practice 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 must also give you feedback on your practice and the decision made.

## Examination of evidence

This is where the assessor reviews the evidence you have produced to see if it meets the assessment criteria.

Evidence can be:

- a reflection of how you carried out a process
- the product of your work
- a product relating to your competence.

For example:

The process that you carry out could be recorded in an observation or witness testimony. It is the assessor's responsibility to determine if the evidence you submit for assessment meets the requirements of the qualification.

Your work could be: notebook entries, completed forms, computer records, statements obtained, or reports completed. After the assessor has examined the evidence, the assessor must record an assessment decision and the justification for the decision. The assessor must also give you feedback on your evidence and the decision made.

## Questioning

Your assessor may question you or your witness for the assessment of these qualifications.

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

- test your knowledge of facts and procedures
- check if you understand principles and theories
- collect information on the type and purpose of the processes you have gone through.

Your assessor will record assessment decisions after they have questioned you. They will record enough information to justify the decisions they make. This does not mean that assessors will record, word for word, the questions put to you and the answers you give. However, assessors will record enough information about what they asked and how you 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 your competence over a period of time.

## Professional discussion

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

## Witness statements/testimonies

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

If a witness provides a written statement they need to include the following information:

- your name
- the date, time and venue of the activity carried out
- a description of the activities you performed
- the date of writing the testimony
- a description of the witness' relationship to you
- 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 you did. The assessor will then judge whether the activities demonstrate competence. It is not acceptable for you to produce written witness testimonies for witnesses to sign.



## Simulation

Sometimes it is not possible to do the activities that are set down in the assessment criteria. For example the assessment criteria may state that you need to evacuate a burning building. It may be that you never have to do this activity in real life. So for these types of activities simulation may be used.

Your assessor will know which assessment criteria can be evidenced through simulation.

Examples of where simulation may be used include:

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

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

## Copyright and plagiarism

Assessors must be confident that the work they mark is your own work. This does not mean that you must be supervised throughout the completion of all work but the assessor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of your work.

Students 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 you being disqualified. It is therefore important you understand that work you submit must be your own. You may refer to research, quotations or evidence but you must list your sources.

## YOUR PORTFOLIO

We have looked at the different types of evidence you might produce for your qualification. In this section we will look at how you should record your evidence.

### The portfolio

A portfolio is a well-organised collection of your evidence for your qualification. It can be any shape or size, depending on the type of evidence you want to have assessed. It can be paper based or in an electronic format.

Your centre will help you to decide which will be the best option for you when you start your qualification.

The portfolio belongs to you and it is your responsibility to keep it safe and secure. If the portfolio is lost or damaged you may have to reproduce some evidence, which may delay your progress towards your qualification. Your centre may arrange to store the portfolio for you if you decide this is the best way to keep it safe.

Sometimes your centre will need to store the portfolio so it can be checked by the internal and external verifiers. When you have completed your portfolio, the centre will usually keep it until the external verifier has visited. The portfolio will then be returned to you.

### Building a portfolio

It is your responsibility to collect your evidence and build a portfolio. Although your centre will help you to do this, it is up to you to make sure you agree a way of organising evidence that you are happy with.

Your portfolio must show how the evidence you have collected covers the standards. It should be clearly logged and referenced, so that your assessor and verifiers can check it easily. You must show you have covered all of the learning outcomes, assessment criteria and evidence requirements in the qualification units.

We recommend that you use a simple referencing system for your evidence. You will often find that one piece of evidence can be used for more than one unit. In these cases, you should clearly cross-reference the evidence to the units and elements it covers, indicating specific assessment criteria.

There may be some evidence that you cannot put into your portfolio because it is too bulky, or because it is confidential. In these cases, you should make a note in your portfolio to explain where the evidence can be found.

## Portfolio contents

Whether you have an electronic or paper-based portfolio, it will need to contain the following information:

### Introductory section:

- your personal and contact details
- your centre contact details
- the name and scheme code of your qualification
- your OCR candidate number (you get this when the centre registers you with OCR for this qualification)
- your curriculum vitae, job description or personal statement
- names and contact details of staff involved in assessing and verifying your qualification
- names and contact details of witnesses.

### Assessment section:

- a summary of your achievements
- an evidence log or locator to reference your evidence to the standards
- your assessment plans and reviews including
  - your assessment feedback
  - assessment decisions.

### Evidence section:

- index of evidence
- your pieces of evidence
- evidence assessment records such as records of observations and professional discussions
- records of questions and your answers
- unit progress and sign off record.

## Recording forms

There is a set of OCR Recording Forms you can use to help you build your portfolio. Your centre has access to these on the OCR website.



# CUSTOMER SERVICE JOB ROLES

Customer Service roles can be diverse in nature, from those specifically dedicated to providing customer-facing service for organisations (such as working on a customer service desk), to those where customer service is an inherent aspect of the job role, such as a Dental Nurse or Postman.

The following list is designed to provide an example of the types of roles that necessitate good customer service skills. It is in no way intended to be an exhaustive list:

## Level 2

- Customer Service Agents
- Customer Service and Sales Representatives
- Reception Desk Administrators (Hotel, Leisure Centre, Solicitors etc)
- Customer Service and Sales Desk Assistants
- Call Centre Operators
- Shipping Clerks
- Helpdesk Assistants
- Customer Service Operatives
- Waiter/Bar Tender
- Sales Assistant/Personal Shopper
- Courier
- Hairdresser/Beautician
- Benefits Adviser
- Housing Warden
- Community Police Officer (patrol and front desk)
- Transport Worker (ticket office, travel adviser)
- Dental Nurse
- Bus Driver
- Postman
- Travel Agent

## Level 3

- Sales Team Supervisor
- Customer Service Team Leader
- PR Assistant
- Marketing Executive
- Senior Sales Assistant
- Department Manager
- Buyer/Merchandiser
- Manager (restaurant, bar, retail, office, warehouse)



# LEVEL 2 CERTIFICATE IN CUSTOMER SERVICE

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:

## GROUP A MANDATORY UNITS (8 CREDITS)

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE                                   | CREDIT VALUE | LEVEL |
|---------|---------------------------|--|--------------|-------|
| F1      | F/601/1609                | Communicate using customer service language  | 4            | 1     |
| F2      | L/601/1614                | Follow the rules to deliver customer service | 4            | 2     |

## GROUP B OPTIONAL UNITS - IMPRESSION AND IMAGE

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE   | CREDIT VALUE | LEVEL |
|---------|---------------------------|--|--------------|-------|
| A1      | R/601/1209                | Maintain a positive and customer-friendly attitude                     | 5            | 1     |
| A2      | L/601/1211                | Adapt your behaviour to give a good customer service impression        | 5            | 1     |
| A3      | R/601/1212                | Communicate effectively with customers                                 | 5            | 2     |
| A4      | L/601/0933                | Give customers a positive impression of yourself and your organisation | 5            | 2     |
| A5      | D/601/0936                | Promote additional services or products to customers                   | 6            | 2     |
| A6      | H/601/1215                | Process information about customers                                    | 5            | 2     |
| A7      | M/601/1217                | Live up to the customer service promise                                | 6            | 2     |
| A8      | T/601/1218                | Make customer service personal   | 6            | 2     |
| A9      | M/601/1220                | Go the extra mile in customer service                                  | 6            | 2     |
| A10     | T/601/1221                | Deal with customers face to face                                       | 5            | 2     |
| A11     | F/601/1223                | Deal with incoming telephone calls from customers                      | 5            | 2     |
| A12     | J/601/1224                | Make telephone calls to customers                                      | 6            | 2     |
| A13     | R/601/1226                | Deal with customers in writing or electronically                       | 6            | 3     |
| A14     | D/601/1228                | Use customer service as a competitive tool                             | 8            | 3     |

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE   | CREDIT VALUE | LEVEL |
|---------|---------------------------|--|--------------|-------|
| A15     | D/601/1231                | Organise the promotion of additional services or products to customers | 7            | 3     |
| A16     | K/601/1233                | Build a customer service knowledge set                                 | 7            | 3     |

### GROUP C OPTIONAL UNITS - DELIVERY

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE  | CREDIT VALUE | LEVEL |
|---------|---------------------------|---|--------------|-------|
| B1      | A/601/1205                | Do your job in a customer-friendly way                      | 5            | 1     |
| B2      | J/601/1210                | Deliver reliable customer service                           | 5            | 2     |
| B3      | Y/601/1213                | Deliver customer service on your customer's premises        | 5            | 2     |
| B4      | K/601/1216                | Recognise diversity when delivering customer service        | 5            | 2     |
| B5      | A/601/1219                | Deal with customers across a language divide                | 8            | 2     |
| B6      | A/601/1222                | Use questioning techniques when delivering customer service | 4            | 2     |
| B7      | L/601/1225                | Deal with customers using bespoke software                  | 5            | 2     |
| B8      | Y/601/1227                | Maintain customer service through effective handover        | 4            | 2     |
| B9      | H/601/1229                | Deliver customer service using service partnerships         | 6            | 3     |
| B10     | Y/601/1230                | Organise the delivery of reliable customer service          | 6            | 3     |
| B11     | H/601/1232                | Improve the customer relationship                           | 7            | 3     |

### GROUP D OPTIONAL UNITS - HANDLING PROBLEMS

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE  | CREDIT VALUE | LEVEL |
|---------|---------------------------|---|--------------|-------|
| C1      | M/601/1508                | Recognise and deal with customer queries, requests and problems | 5            | 1     |
| C2      | T/601/1509                | Take details of customer service problems                       | 4            | 1     |
| C3      | M/601/1511                | Resolve customer service problems                               | 6            | 2     |
| C4      | T/601/1512                | Deliver customer service to difficult customers                 | 6            | 2     |
| C5      | J/601/1515                | Monitor and solve customer service problems                     | 6            | 3     |
| C6      | D/601/1519                | Apply risk assessment to customer service                       | 10           | 3     |
| C7      | D/601/1522                | Process customer service complaints                             | 6            | 3     |

## GROUP E OPTIONAL UNITS - DEVELOPMENT AND IMPROVEMENT

| UNIT NO | UNIT ACCREDITATION NUMBER | UNIT TITLE   | CREDIT VALUE | LEVEL |
|---------|---------------------------|--|--------------|-------|
| D1      | T/601/1526                | Develop customer relationships                                   | 6            | 2     |
| D2      | A/601/1530                | Support customer service improvements                            | 5            | 2     |
| D3      | R/601/1534                | Develop personal performance through delivering customer service | 6            | 2     |
| D4      | H/601/1540                | Support customers using on-line customer services                | 5            | 2     |
| D5      | M/601/1542                | Buddy a colleague to develop their customer service skills       | 5            | 2     |
| D6      | R/601/1548                | Develop your own customer service skills through self-study      | 6            | 2     |
| D7      | Y/601/1549                | Support customers using self-service technology                  | 5            | 2     |
| D8      | D/601/1553                | Work with others to improve customer service                     | 8            | 3     |
| D9      | H/601/1554                | Promote continuous improvement                                   | 7            | 3     |
| D10     | K/601/1555                | Develop your own and others' customer service skills             | 8            | 3     |
| D11     | H/601/1568                | Lead a team to improve customer service                          | 7            | 3     |
| D12     | H/601/1571                | Gather, analyse and interpret customer feedback                  | 10           | 3     |
| D13     | T/601/1574                | Monitor the quality of customer service transactions             | 7            | 3     |



## UNIT F1 (F/601/1609)

### COMMUNICATE USING CUSTOMER SERVICE LANGUAGE

#### Learning Outcome 1 - Identify customers and their characteristics and expectations

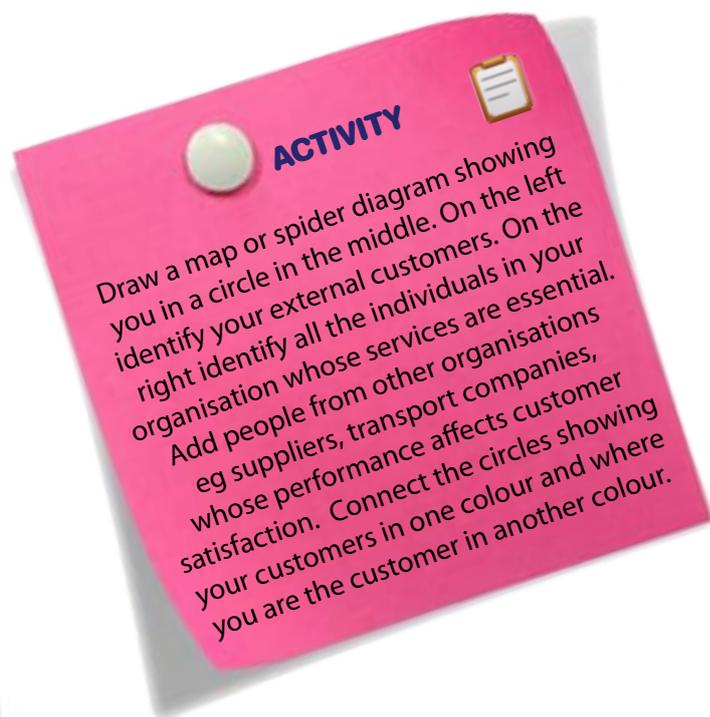
##### Assessment criteria. I can:

- 1.1 Recognise typical customers and their expectations
- 1.2 Discuss customer expectations with colleagues using recognised customer service language
- 1.3 Follow procedures through which myself and my colleagues deliver effective customer service

#### Learning Outcome 2 - Identify my organisation's services and products

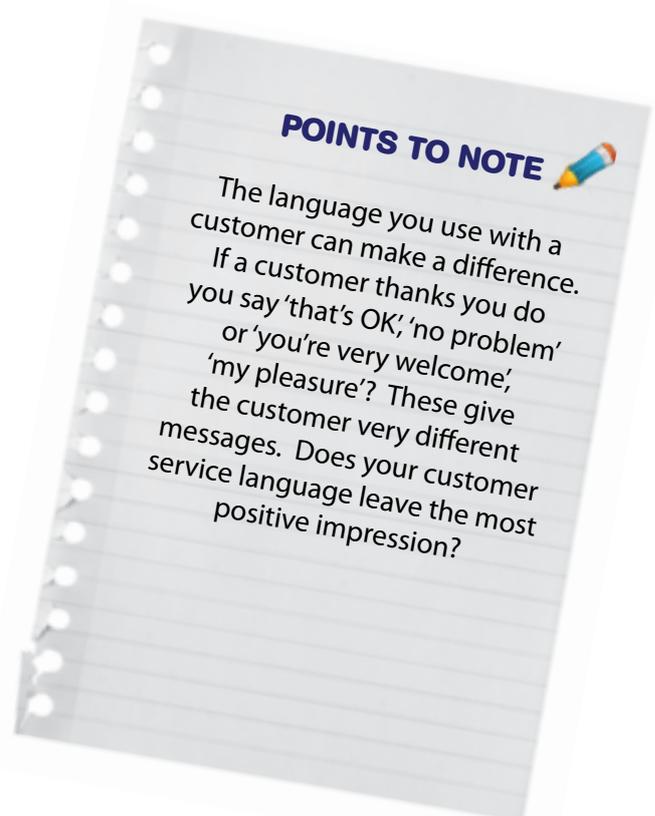
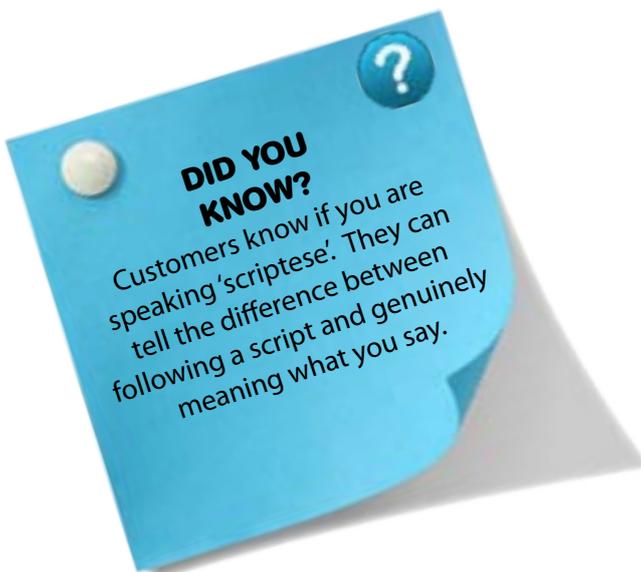
##### Assessment criteria. I can:

- 2.1 Outline my organisation's services and products to customers
- 2.2 Greet customers politely and positively
- 2.3 List the information I need to deliver effective customer service and where that information can be found



**Learning outcome 3 - Know how to communicate using customer service language****Assessment criteria. I can:**

- 3.1 Identify the differences between an internal customer and an external customer
- 3.2 List my organisation's services or products
- 3.3 Describe the connection between customer expectations and customer satisfaction in customer service
- 3.4 Describe why organisation procedures are important to good customer service
- 3.5 Explain why teamwork is central to good customer service
- 3.6 Identify the service offer of my organisation
- 3.7 Identify the part I play in delivering customer service
- 3.8 Identify who are my customers
- 3.9 Describe the main characteristics of typical customers that I deal with
- 3.10 Identify what impresses my customers and what annoys my customers
- 3.11 Identify who's who and who does what to deliver customer service in my organisation
- 3.12 Describe the kinds of information I need to give good customer service to customers
- 3.13 Explain how to find information about my organisation's services or products
- 3.14 List typical customer service problems in my work and who should be told about them
- 3.15 Explain how the way I behave affects my customer's service experience



### Typical customers

Your organisation's product or service may attract typical customers with certain characteristics and expectations. For example, not all, but most older customers expect you to be more polite and attentive.

### Internal and external customers

Internal customers work for your organisation and benefit from the service you provide. External customers are members of the public or other organisations who benefit directly from the product or service offered by your organisation.

### Customer satisfaction

You can only satisfy or exceed a customer's needs and expectations if you know what they are. Get to know what impresses and what annoys your customer. Find out what they want and always check you have understood their expectations correctly.

### Teamwork

It takes a team to deliver excellent customer service. The person who has direct contact with the customer is supported by a chain of people who manufacture, supply, order, receive the product, update the records, pay the bills etc. Good communication keeps this chain strong.

### Customer service problems

If something is a problem for the customer, it is a problem for your organisation. A complaint is a gift and a problem is an opportunity to improve your customer service. Don't ignore it, it won't go away but your customer might.



# UNIT F2 (L/601/1614)

## FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

### THIS IS A MANDATORY UNIT

This unit requires you to understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job role.

The unit is divided into two outcomes:

1. Follow my organisation's customer service practices and procedures.
2. Know how to follow the rules to deliver customer service.



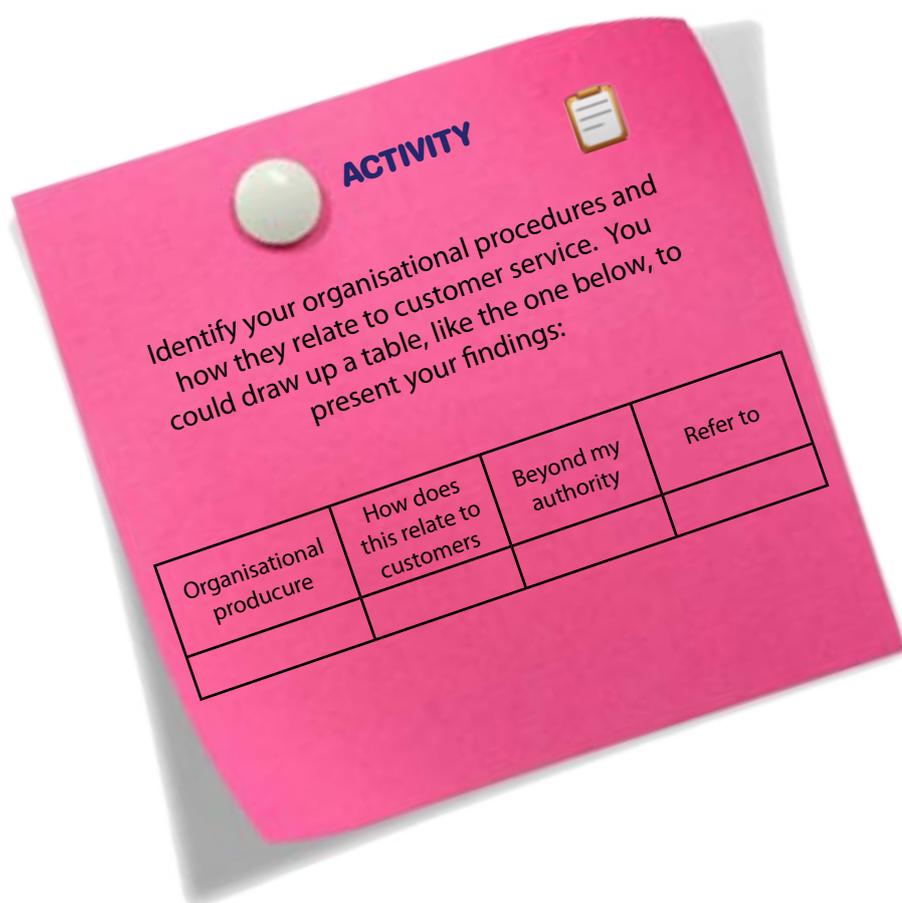
## UNIT F2 (L/601/1614)

### FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

#### Learning outcome 1 - Follow my organisation's customer service practices and procedures

##### Assessment criteria. I can:

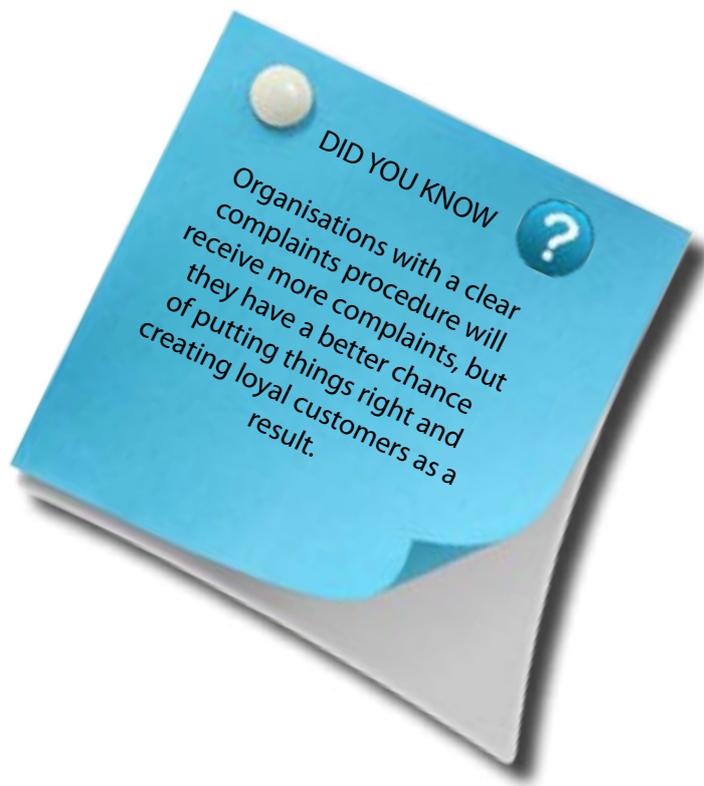
- 1.1 Follow organisational practices and procedures that relate to my customer service work
- 1.2 Recognise the limits of what I am allowed to do when delivering customer service
- 1.3 Refer to somebody in authority when I need to
- 1.4 Work in a way that protects the security of customers and their property
- 1.5 Work in a way that protects the security of information about customers



**Learning outcome 2 - Know how to follow the rules to deliver customer service**

**Assessment criteria. I can:**

- 2.1 Describe organisational practices and procedures that relate to my customer service work
- 2.2 Identify the limits of what I am allowed to do when delivering customer service
- 2.3 Explain when and how I should refer to somebody in authority about the rules for delivering customer service
- 2.4 Explain how I protect the security of customers and their property
- 2.5 Explain how I protect the security of information about customers
- 2.6 Describe my health and safety responsibilities as they relate to my customer service work
- 2.7 Explain my responsibilities to deliver customer service treating customers equally
- 2.8 Explain why it is important to respect customer and organisation confidentiality
- 2.9 List the main things I must do and not do in my job under legislation that affects my customer service work
- 2.10 List the main things that I must do and not do in my job under external regulations that affect my customer service work



## UNIT F2 (L/601/1614)

# FOLLOW THE RULES TO DELIVER CUSTOMER SERVICE

### Key terms

#### Organisational procedures

Procedures are drawn up to meet legal requirements and encourage consistent good practice at work. They ensure the health, safety and well-being of employees and customers.

#### Legislation and codes of practice

Legislation protects employees and customers. Full details can be found at [www.legislation.gov.uk](http://www.legislation.gov.uk). There may also be guidelines or codes of practice specific to your sector.

#### Security of customers and their property

Visiting customers need to know about particular health and safety requirements and how to keep their personal possessions, car etc safe.

#### Security of customer information

Customers need to know you are following the requirements of the Data Protection Act and that information about them will be processed fairly and securely.

#### Customer and organisational confidentiality

Sensitive information shared by customers must not be passed on or recorded, nor should organisational practices be discussed outside of work. Respect and loyalty are key qualities.





## **SKILLS FOR BUSINESS QUALIFICATIONS**

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