



# Evidence Requirements for Customer Service S/NVQs



**April 2010**

These Evidence Requirements were developed by the Awarding Organisations/Bodies listed below:



*Active IQ*

*City and Guilds of London Institute*

*Edexcel*

*Education Development International plc (EDI)*

*IMI Awards Ltd*

*NCFE*

*Open University (OU)*

*Oxford Cambridge and RSA examinations (OCR)*

*Scottish Qualifications Authority (SQA)*

*Skillsfirst Awards*

*Vocational Training Charitable Trust (VTCT)*



## **Unit F1 – Communicate using customer service language**

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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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.

## **Unit F2 – Follow the rules to deliver customer service**

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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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

### **Unit F3 – Demonstrate understanding of customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
5. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

## **Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

## **Unit F5 – Demonstrate understanding of customer service management**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

## **Unit F6 – Follow organisational rules, legislation and external regulations when managing customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 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. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.

## **Unit A1 – Maintain a positive and customer-friendly attitude**

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 evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you are positive and customer-friendly with customers who are:
  - a easy to deal with
  - b difficult to deal with.
6. You need to include evidence that you are positive and customer-friendly:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.



## Unit A2 – Adapt your behaviour to give a good customer service impression

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 evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you are positive and customer-friendly with customers who are:
  - a easy to deal with
  - b difficult to deal with.
6. You need to include evidence that you are positive and customer-friendly:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.

### **Unit A3 – Communicate effectively with customers**

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 evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Level 1 – February 2010*)
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You need to include evidence that you have communicated effectively with customers:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.
6. You need to include evidence that you have communicated effectively with different customers who:
  - a have an easy-going attitude
  - b have a difficult attitude
  - c are easy to understand
  - d are difficult to understand.
7. The messages you pass on to colleagues may be verbal, in writing or passed on by any other method you would be expected to use within your job.

## **Unit A4 - Give customers a positive impression of yourself and your organisation**

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of creating a positive impression with customers:
  - 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.
6. You must provide evidence that you communicate with customers effectively by:
  - a using appropriate spoken or written language
  - b applying the conventions and rules appropriate to the method of communication you have chosen.

## Unit A5 - Promote additional services or products to customers

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence that the additional services or products offered include:
  - a use of services or products that are new to your customer
  - b additional use of services or products that your customer has used before.
6. Your evidence must show that you:
  - a identify what your customer wants by seeking information directly
  - b identify what your customer wants from spontaneous customer comments.

## Unit A6 - Process information about customers

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence that you have processed information relating to:
  - a new customers
  - b existing customers.
6. Your evidence must show that you have:
  - a checked whether the information you are collecting and retrieving is accurate and up-to-date
  - b selected information that is directly relevant to each of your customers.

## Unit A7 - Live up to the customer service promise

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your organisation's service offer, vision and promise may be expressed formally or may be simply an informal description of the way customer service is delivered.
5. Your evidence of your organisation's service offer, vision and promise must include examples of:
  - a the way these are communicated to customers
  - b how your job role links with your organisation's offers.
6. You must show how you deliver the customer service promise:
  - a through your own efforts
  - b working with others.
7. Your evidence must show that you have taken opportunities to reinforce your organisation's message:
  - a through organisation initiatives
  - b by responding to opportunities when dealing with customers.

## Unit A8 - Make customer service personal

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of making customer service personal:
  - 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.
6. Your evidence must include examples of how you have dealt with customers who are:
  - a happy with the service they are receiving
  - b unhappy about the service they are receiving.
7. You must provide evidence that you have made customer service more personal:
  - a when you have taken the initiative
  - b in response to an opportunity presented when your customer has asked a question.

## Unit A9 - Go the extra mile in customer service

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence of going the extra mile with customers:
  - 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.
5. Your evidence must show that you have:
  - a followed organisational procedures to go the extra mile for customers
  - b used your own initiative when going the extra mile for customers.



## Unit A10 - Deal with customers face to face

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010)*
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. Your evidence must include examples of dealing with customers who:
  - a have standard expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
5. Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
6. You must provide evidence of dealing with customers face to face:
  - 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.
7. You must include examples of how you have made use of :
  - a verbal communication skills
  - b non-verbal communication skills.

## Unit A11 - Deal with incoming telephone calls from customers

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
5. Your evidence must include examples of dealing with customers who:
  - a have standard expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
6. Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
7. You must provide evidence of dealing with customers by telephone:
  - 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.
8. You must provide evidence that you have taken messages that are passed on to colleagues:
  - a verbally
  - b in a form that maintains a permanent record.

## Unit A12 – Make telephone calls to customers

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
5. Your evidence must include examples of dealing with customers who:
  - a are receptive to the content of your call
  - b are not receptive to the content of your call.
6. You must provide evidence of dealing with customers by telephone:
  - 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.

## **Unit A13 - Deal with customers in writing or electronically**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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. Your communication with customers may be in writing, by text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
5. Your evidence must include examples of dealing with customers who:
  - a have routine expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
6. The style and tone of your communication must follow organisational guidelines and you must provide evidence that you have taken account of:
  - a your job role and position in your organisation
  - b the personal style and preferences of your customer
  - c the conventions of the medium of communication you are using.
7. You must show that you have communicated with customers when:
  - a you have initiated the contact
  - b you are responding to a customer.

## **Unit A14 - Use customer service as a competitive tool**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:
  - a tangible in that they can be measured
  - b intangible in that they are represented solely by feelings and perceptions of the customer experience.
5. Your evidence must include examples of competitive analysis involving:
  - a direct competitors
  - b competitors offering substitute services or products.
6. Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
  - a loyal customers
  - b customers returning from competitors
  - c new customers.

## **Unit A15 - Organise the promotion of additional services or products to customers**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You must provide evidence that you:
  - a use agreed organisational procedures and systems
  - b create your own opportunities.
5. Your evidence must show that you have:
  - a taken responsibility for your own actions in promoting services or products
  - b used spontaneous customer feedback to identify opportunities for promoting services or products
  - c used customer feedback that you have requested to identify opportunities for promoting services or products
6. Your evidence must include examples of:
  - a existing customers extending their use of your services or products
  - b new customers making use of your services or products.

## **Unit A16 – Build a customer service knowledge set**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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.

There are no additional evidence requirements other than those expressed within the Unit.

## Unit A17 - Champion customer service

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. You must provide evidence that you have monitored developments that, in relation to your own area of responsibility, are:
  - a strategic
  - b operational.
5. Your evidence must show that you have analysed the implications of customer service developments for:
  - a the quality of services or products
  - b the way services or products are delivered
  - c customer relationships.
6. You must provide evidence that you have responded to requests for information and advice from two of these groups:
  - a front line staff
  - b supervisors or team leaders
  - c senior managers
  - d colleagues in other departments
  - e service partners.
7. Your evidence must show that you have provided information and advice about:
  - a the quality of services or products
  - b the way services or products are delivered
  - c customer relationships.
8. Your evidence must show that you have communicated customer service advice and information using two different communication media.



## **Unit A18 - Make customer service environmentally friendly and sustainable**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. The customer service systems referred to in your evidence may be formal or informal.
5. The waste management policy used in your evidence must cover:
  - a reduction
  - b re-use
  - c re-cycling
  - d disposal.
6. Your evidence should include working with customers who are:
  - a receptive to environmental initiatives
  - b resistant to environmental initiatives.

## Unit B1 - Do your job in a customer-friendly way

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 evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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. Your evidence must show that you have done your job in a customer-friendly way:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.
5. You need to include evidence that you are doing your job in a customer-friendly for customers who are:
  - a easy to deal with
  - b difficult to deal with.

## Unit B2 - Deliver reliable customer service

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence that you have worked with different customers who have different needs and expectations.
5. You must provide evidence of delivering reliable 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.

### Unit B3 - Deliver customer service on your customer's premises

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence that you deliver excellent 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.
5. You must provide evidence that you deliver excellent customer service during:
  - a planned visits to your customer's premises
  - b visits to your customer's premises made at short notice.
6. You must provide evidence that you deliver excellent customer service:
  - a when your work goes to plan
  - b when your work does not go to plan.
7. You must provide evidence that you deliver excellent customer service:
  - a with your customer present
  - b when your customer is not present.

## Unit B4 - Recognise diversity when delivering customer service

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your evidence must show that you have developed your approach to diversity taking account of:
  - a relevant legislation
  - b sector or industry codes of practice
  - c the policies and procedures of your own organisation.
5. You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to four of these sources of diversity:
  - a age
  - b disability
  - c national origin
  - d sexual orientation
  - e values
  - f ethnic culture
  - g education
  - h lifestyle
  - i beliefs
  - j physical appearance
  - k social class
  - l economic status.
6. You must provide examples of situations when you have adapted your behaviour to:
  - a deliberately adopt different approaches to different groups of customers
  - b deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements.

## **Unit B5 – Deal with customers across a language divide**

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence of dealing with customers across a language divide:
  - a during routine delivery of customer service
  - b during a busy time in your job
  - c during a quiet time in your job.

## Unit B6 – Use questioning techniques when delivering customer service

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence of using questioning techniques when delivering 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.
5. You need to include evidence of using questioning techniques with customers who are:
  - a. easy to deal with
  - b. difficult to deal with.

## Unit B7 – Deal with customers using bespoke software

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of dealing with customers using bespoke software:
  - 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.



## Unit B8 – Maintain customer service through effective hand over

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence of maintaining customer service through effective hand over:
  - 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.
5. You do not need to be more senior than your colleague or be their supervisor to pass on responsibility to them for customer service actions or check completion.

## **Unit B9 - Deliver customer service using service partnerships**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 produce 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 service level agreement between service partners in your evidence may be formal or informal.
5. You must provide examples of working in a service partnership on occasions when:
  - a the service partners are cooperative
  - b the service partners are un-cooperative.
6. You must include evidence to show that you have worked in a service partnership with:
  - a regular or long term suppliers
  - b new suppliers.
7. Your evidence must show that you have negotiated agreements with service partners that are of benefit to:
  - a your organisation
  - b your service partner

## **Unit B10 - Organise the delivery of reliable customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You need to include evidence that you have dealt with a variety of customers including:
  - a customers who are easy to deal with
  - b customers who are difficult to deal with
  - c existing customers
  - d new customers.
5. Your evidence must show that you have:
  - a taken responsibility for your own actions in the delivery of customer service
  - b used spontaneous customer feedback to improve customer service
  - c used customer feedback that you have requested to improve customer service
6. The system you use for recording data can be manual or electronic.

## **Unit B11 - Improve the customer relationship**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. Your evidence must include examples of using:
  - a organisational procedures
  - b exceptions to standard practice that are legal and benefit your organisation.
5. You need to provide evidence that you have dealt with customers who:
  - a have different needs and expectations
  - b appear angry or confused
  - c behave unusually.

## **Unit B12 - Maintain and develop a healthy and safe customer service environment**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for performance evidence within this Unit except when realistic practices are staged to test emergency procedures.
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 for your assessor to be confident that you are competent.
4. Your evidence must show that you have assessed and controlled risks associated with:
  - a the use of equipment
  - b the working environment
  - c working practices
  - d potential breaches of security
  - e factors that affect the well-being of staff
  - f factors that affect the well-being of customers.
5. You must provide evidence that you have collected and evaluated key requirements of:
  - a legal requirements
  - b regulatory requirements
  - c organisational codes of practice
  - d ethical codes of practice.

## **Unit B13 - Plan, organise and control customer service operations**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. Your plans must provide evidence that you have taken into account:
  - a the aims, objectives and targets for your area of responsibility
  - b your organisation's customer service strategy
  - c your customers' needs and expectations.
5. Your evidence must show that your plans include consideration of:
  - a time
  - b physical resources
  - c human resources
  - d financial resources.
6. You must show that you have negotiated with:
  - a front-line staff
  - b supervisors or team leaders
  - c senior managers.
7. You must provide evidence that you have collected and analysed:
  - a qualitative information
  - b quantitative information.

## **Unit B14 - Review the quality of customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. You must include evidence of collecting and analysing information that is:
  - a quantitative
  - b qualitative.
5. Your communication of the results of your measurements may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
6. Your evidence must show that you have communicated the results of your measurements to three of these groups of people:
  - a front line staff
  - b supervisors or team leaders
  - c senior managers
  - d colleagues in other departments
  - e service partners.

## Unit B15 - Build and maintain effective customer relations

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. You must provide evidence that you can build and maintain relationships with:
  - a potential or new customers
  - b existing customers
  - c customers with particular needs and expectations
  - d customers who have experienced problems with your organisation's services or products.
4. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence that you have collected feedback that is:
  - a qualitative
  - b quantitative
  - c formal
  - d informal.



## **Unit B16 – Deliver seamless customer service with a team**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. Your evidence must show that you have built relationships with members of your organisation from two of these groups of people:
  - a front line staff
  - b supervisors or team leaders
  - c senior managers
  - d colleagues in other departments
  - e service partners.
5. Your evidence must show that you have communicated with team members and service partners using two different communication media.

## **Unit C1 - Recognise and deal with customer queries, requests and problems**

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 also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. *(Guidelines for the assessment of Simulated Activities and a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your evidence must include examples of problems which are:
  - a brought to your attention by customers
  - b identified first by you and/or by your colleagues.
5. The problems included in your evidence must include examples of:
  - a a difference between customer expectations and what is offered by your organisation
  - b a problem resulting from a system or procedure failure.

## Unit C2 – Take details of customer service problems

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 also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work. (*Guidelines for the assessment of Simulated Activities and a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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. You need to include evidence of taking details of customer service problems from customers who are:
  - a. easy to deal with
  - b. difficult to deal with.
5. You may include evidence that you have passed details to a colleague able to deal with the problem either verbally or in writing.

### Unit C3 - Resolve customer service problems

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your evidence must include examples of resolving problems involving each of the following:
  - a a problem first identified by customers
  - b a problem identified within the organisation before it has affected your customer
  - c a problem caused by differences between your customer's expectations and what your organisation can offer
  - d a problem caused by a system or procedure failure
  - e a problem caused by a lack of resources or human error.
5. You must provide evidence that you:
  - a supplied relevant information when customers have requested it
  - b supplied relevant information when customers have not requested it
  - c have used agreed organisational procedures when solving problems
  - d have made exceptions to usual practice with the agreement of others.

## Unit C4 – Deliver customer service to difficult customers

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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.
5. You must provide evidence of delivering customer service to difficult customers:
  - 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.

## Unit C5 - Monitor and solve customer service problems

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. Your evidence must include examples of problems which are:
  - a brought to your attention by customers
  - b are identified first by you and/or by a colleague.
5. The problems included in your evidence must include examples of a:
  - a difference between customer expectations and what is offered by your organisation
  - b problem resulting from a system or procedure failure
  - c problem resulting from a shortage of resources or human error.
6. You must show that you have considered the options for solving problems from the point of view of:
  - a your customer
  - b the potential benefits to your organisation
  - c the potential risks to your organisation.
7. You must provide evidence that you have made use of options that:
  - a follow organisational procedures or guidelines
  - b make agreed and authorised exceptions to usual practice.

## Unit C6 - Apply risk assessment to customer service

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 procedures you follow for risk assessment may be formal or informal and may or may not be written.
5. You must provide evidence that you have identified risks in your own area of responsibility:
  - a through your everyday work
  - b actively carrying out a risk assessment
  - c through discussion with colleagues.
6. Your evidence must show that when carrying out a risk assessment you have:
  - a listed each risk
  - b identified the consequences of each risk
  - c estimated the probability of each risk occurring
  - d made a judgement about any action that is justified taking into account the consequences and probability of each risk.
7. You must provide evidence that you have worked with two of these groups of people to identify possible actions for managing risk:
  - a team members or colleagues
  - b suppliers or service partners
  - c supervisors, team leaders or managers.
8. Your evidence must show that you have carried out risk assessments that have caused you to:
  - a take action to manage the risk
  - b decide that the level of risk is tolerable and take no action.

## Unit C7 - Process customer service complaints

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You must provide evidence that you have processed complaints that are seen by your organisation as:
  - a justified
  - b unjustified.
5. You must provide evidence of processing customer service complaints:
  - 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.
6. You need to provide evidence that you have dealt with customers who:
  - a have different needs and expectations
  - b appear angry or confused
  - c behave unusually.
7. You must provide evidence that you have processed complaints and taken full account of:
  - a organisational procedures
  - b sector or industry codes of practice
  - c legislation.



## Unit C8 - Handle referred customer complaints

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. You must provide evidence that you have collected and analysed:
  - a qualitative information
  - b quantitative information.
5. You must show that you have dealt with complaints from customers who are:
  - a prepared to accept your proposed solutions
  - b not prepared to accept your proposed solutions.
6. The complaints included in your evidence must include examples of:
  - a a difference between customer expectations and what is offered by your organisation
  - b a problem resulting from a system or procedure failure
  - c a problem resulting from a shortage of resources or human error.

## Unit D1 - Develop customer relationships

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
5. You must provide evidence of taking actions to meet the needs and expectations of your customer and of your organisation:
  - a without being asked by your customer
  - b at your customer's request.
6. You must include evidence that you have balanced the needs of your customers and your organisation by:
  - a making use of alternative products or services offered by the organisation
  - b varying the service you would normally offer within organisational guidelines
  - c saying 'no' to your customer and explaining the limits of your organisation's service offer.

## Unit D2 - Support customer service improvements

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. You must provide evidence that you have:
  - a contributed to improving customer service through your own efforts
  - b contributed to improving customer service by working with others.
5. Your evidence must cover two changes with which you have been actively involved. In each case you must be able to identify the part you played in;
  - a linking customer feedback with the reasons for the change
  - b implementing the change
  - c gathering customer reactions to the change.
6. Your evidence for each change must show how:
  - a the change has improved customer service
  - b your customers have reacted to the change.
7. Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

### **Unit D3 - Develop personal performance through delivering customer service**

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. An 'appropriate person' must be one or more of the following
  - your manager
  - your supervisor or team leader
  - a colleague detailed to help you learn
  - your assessor
  - your mentor
  - someone from your training or personnel department.
5. You must provide evidence that you have developed your personal development plan taking account of:
  - a information about the knowledge and skills relevant to your customer service role
  - b your own learning style preferences
  - c your workload
  - d opportunities for learning on the job.
6. Your personal development plan must be put on record and agreed with an appropriate person.

## Unit D4 – Support customers using on-line customer services

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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.
5. You must provide evidence of supporting customers who are:
  - a new to the use of on-line services for this particular purpose
  - b familiar with the use of on-line services for this particular purpose
6. Your evidence must include examples of helping customers with difficulties caused by:
  - a the customer's use of the on-line services
  - b a system or equipment failure.

## Unit D5 – Buddy a colleague to develop their customer service skills

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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. You must provide evidence of buddying a colleague to develop their customer service skills:
  - 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.

## Unit D6 – Develop your own customer service skills through self-study

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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. Your evidence must show that you have taken personal responsibility for identifying, locating and using learning materials with only limited guidance and support from your line manager, mentor or colleagues.
5. The information sources and learning materials referred to in your evidence may be any or all of the following:
  - a paper based
  - b on-line or other electronic media
  - c structured discussions.

## Unit D7 – Support customers using self-service technology

1. Your evidence should be collected when carrying out 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 collected in 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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010)*
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 self –service technology used in your evidence may be any technology used outside the home to allow customers to interact with an organisation and help themselves. Examples include, but are not restricted to, scanning groceries, printing a boarding pass, printing photos, buying from an automated vending machine, and using an electronic kiosk to obtain information of conduct a transaction.
5. You must provide evidence of supporting customers who are:
  - a new to the use of self-service equipment for this particular purpose
  - b familiar with the use of self-service equipment for this particular purpose
6. Your evidence must include examples of helping customers with difficulties caused by:
  - a the customer’s use of the technology
  - b a system or equipment failure.



## **Unit D8 - Work with others to improve customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. Your evidence must include examples of agreeing customer service roles and responsibilities which are:
  - a part of your own role
  - b part of other people's roles.
5. You must provide evidence that you have worked with two of these groups of people:
  - a team members or colleagues
  - b suppliers or service partners
  - c supervisors, team leaders or managers.
6. Your evidence must show that your work with others involves communication by two of these methods as expected within your job role:
  - a face to face
  - b in writing
  - c by telephone
  - d using text messages
  - e by e-mail
  - f using the internet (including social networking)
  - g using an intranet.

## **Unit D9 - Promote continuous improvement**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You must provide evidence that you have organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.
5. You must show that your proposals for improvements:
  - a are based on planned and analysed customer feedback
  - b take into account all relevant regulations
  - c take into account the costs and benefits to the organisation.
6. You may carry out this work alone or with colleagues. However, you must provide evidence that you have taken an active role in:
  - a collecting and analysing feedback
  - b proposing initiatives for change
  - c implementing the change
  - d evaluating and reviewing the change.
7. Your evidence must clearly show the part you have played in each step of the continuous improvement process.
8. The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.

## **Unit D10 - Develop your own and others' customer service skills**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. Your personal development plan may be based on existing customer service skills and development activities that already take place in your organisation or new activities that you have to devise.
5. You must have constructed your personal development plan taking account of information about the knowledge and skills relevant to your:
  - a customer service role
  - b own preferred method of learning
  - c workload
  - d opportunities for learning on the job
  - e opportunities for learning off the job.
6. Feedback about your customer service performance must involve your line manager or supervisor and your evidence must show this.
7. Your evidence of coaching may relate either to a single colleague or several colleagues who may be:
  - a new to the organisation or department
  - b new to the job, procedure or system
  - c experienced but seeking to refresh or improve their customer service skills.

## Unit D11 - Lead a team to improve customer service

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. You must provide evidence you have line management or supervisory responsibility for the team members used in your evidence.
5. You must show that you have taken into account the organisational constraints of:
  - a time
  - b human resources
  - c physical resources
  - d financial resources.
6. You must also show that you have taken into account the team or individual constraints of:
  - a existing workloads
  - b individual capabilities and sensitivities
  - c initiatives and objectives currently being undertaken by the organisation
  - d influences operating on the team from outside.
7. Your evidence must provide evidence that you have taken time with each team member to:
  - a plan and organise their work
  - b provide support and guidance
  - c give and seek feedback on performance.
8. The feedback you provide to team members may be
  - a formal or informal
  - b verbal or in writing.

## **Unit D12 - Gather, analyse and interpret customer feedback**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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. Your evidence must show that you have collected feedback from customers:
  - a using informal methods such as conversation and observation of customer reactions
  - b using two different formal methods such as questionnaire, telephone or interview surveys.
5. Your evidence must include feedback that you have collected:
  - a using a method you have devised
  - b following established organisational procedures.
6. You must provide evidence that you have displayed the results of your data collection:
  - a in tabulated form
  - b in graphical or pictorial form.

### **Unit D13 – Monitor the quality of customer service transactions**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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.

There are no additional evidence requirements other than those expressed within the Unit.

## Unit D14 - Implement quality improvements to customer service

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. Your evidence must include planning for and using the following resources when implementing improvements to customer service:
  - a time
  - b human resources
  - c physical resources
  - d financial resources.
5. You must provide evidence of communicating with:
  - a customers
  - b front-line staff
  - c colleagues
  - d supervisors/team leaders
  - e senior managers
  - f service partners.
6. Your communication may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
7. You must include evidence of collecting, analysing and using information that is:
  - a quantitative
  - b qualitative.

## **Unit D15 - Plan and organise the development of customer service staff**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. Your evidence must show that you have been involved with the training and development of staff from two of the following groups
  - a new staff
  - b existing staff
  - c front-line staff
  - d supervisors and team leaders
  - e part-time staff
  - f support staff
  - g service partners.
5. You must show that you monitor the performance of staff involved in development and training activities through:
  - a formal monitoring mechanisms such as appraisals and Key Performance Indicators (KPIs)
  - b informal and more immediate monitoring such as direct supervision.



## **Unit D16 - Develop a customer service strategy for a part of an organisation**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. You should be able to identify and analyse the needs and expectations of:
  - a existing customers
  - b potential or new customers.
5. Your evidence of the approach taken by other organisations may relate to competitors or to organisations that provide similar services or products but are not competitors.
6. The mission, aims, objectives, targets and values of your organisation may be expressed formally or informally.

## Unit D17 - Manage a customer service award programme

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. The award programmes used in your evidence may relate to individuals, teams, special projects, trainees, incentive schemes or customer nominated awards.
5. You must provide evidence that you have planned details of your award programme that include:
  - a the criteria for making the award
  - b what the award will be
  - c the frequency of the award
  - d the procedure for judging the award
  - e how the award will be presented and publicised.
6. The business case for the award programme may be made formally or informally.
7. Your evidence must show that you have evaluated the customer service award programme from the point of view of:
  - a benefits to the organisation
  - b benefits to the supervisors and managers of the winners
  - c the effect on the winner or winners
  - d the effect on others who are not winners.

## **Unit D18 – Apply technology or other resources to improve customer service**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. The technology used in your evidence may be electronic or non-electronic.
5. The costs you establish for each option for improving customer service must be financial.
6. The business case you plan for applying technology or other resources to improve customer service may be formal or informal.
7. Your review of the implementation of customer service improvements may be formal or informal.

## **Unit D19 – Review and re-engineer customer service processes**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. The 'appropriate people' with who you agree the boundaries of the customer service process to be reviewed must include one or more of the following:
  - a people in other departments or sections of the organisation
  - b internal customers
  - c external customers
  - d internal suppliers
  - e service partners
  - f service delivery colleagues
  - g line managers.
5. Your plan for implementing agreed recommendations may be formal or informal.

## **Unit D20 - Manage customer service performance**

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
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 for your assessor to be confident that you are competent.
4. The techniques used in your evidence for interpreting customer service performance statistics and identifying trends may be any which are practical for your organisation.