



SFJ Awards Level 2 Certificate in Customer Service

**Consultation Draft
December 2018**



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Proposed SFJ Awards Level 2 Certificate in Customer Service

Draft Qualification Structure and Units

December 2018

1 About SFJ Awards

SFJ Awards is part of the Workforce Development Trust, together with Skills for Justice and Skills for Health. For over 10 years **Skills for Health** and **Skills for Justice** have been working with employers, Governments of the UK and agencies within the skills system, to better equip workforces with the right skills now and for the future.

During this time both Skills for Health and Skills for Justice have earned an enviable reputation for their knowledge of the health and justice sectors and their proactive approach to the development of skills and qualifications, along with an ability to deliver genuinely workable solutions for the employers they represent.

SFJ Awards is an awarding organisation that builds upon this reputation. We work with employers in the policing, community safety, legal, armed forces and health sectors and understand their specific challenges, enabling us to quality assure learning outcomes that are suited to the needs of the sectors.

Customer satisfaction is the cornerstone of our organisation, and is delivered through an efficient service, providing excellent value for money.

2 Background to proposed SFJ Awards Level 2 Certificate in Customer Service

This new qualification is being developed by SFJ Awards to provide a smaller qualification based on newer standards, that is more suitable to centre requirements. It is based on feedback received from current centres delivering the older qualifications.

SFJ Awards wish to consult with any stakeholders who may have an interest in and wish to comment on the draft qualification.

3 What units include

The draft units included in the SFJ Awards Level 2 Certificate in Customer Service are made up of the following main components:

- Unit title – providing a clear indication of the content of the unit
- Unit level – indicating the level of the unit in relation to RQF level descriptors, included in section 7

- Learning outcomes – setting out what a learner is expected to know, understand or be able to do as the result of a process of learning
- Assessment criteria – specifying the standard a learner is expected to meet to demonstrate that the learning outcomes have been achieved
- Guided Learning Hours (GLH) – define the number of hours where the learner is given specific input, usually by a tutor, in order to achieve the learning outcomes
- Credit value – specifying the number of credits that will be awarded to a learner who has achieved the learning outcomes

4 Proposed qualification structure

The proposed qualification consists of 27 credits which have been designed to develop the knowledge and skills required to deliver Customer Service:

Structure:	14 credits from the mandatory units and a minimum of 13 credits from the optional units
Number of Credits:	27
Guided Learning Hours:	142
Total Qualification Time:	270 hours

Mandatory units

Unit No	Unit Title	Level	Credit Value	GLH
1	Deliver customer service	2	5	27
2	Understand customers	2	2	17
3	Principles of customer service	2	3	22
4	Manage personal performance and development	2	4	18

Optional units

Unit No	Unit Title	Level	Credit Value	GLH
5	Communicate verbally with customers	2	3	14
6	Communicate with customers in writing	2	3	20
7	Deal with customers face to face	2	5	33
8	Deal with incoming telephone calls from customers	2	3	16
9	Make telephone calls to customers	2	3	16
10	Promote additional products and/or services to customers	2	2	14

11	Process information about customers	2	3	14
12	Exceed customer expectations	2	3	15
13	Deliver customer service whilst working on customers' premises	2	4	20
14	Carry out customer service handovers	2	3	15
15	Resolve customer service problems	2	5	22
16	Deliver customer service to challenging customers	2	3	16
17	Develop customer relationships	2	3	18
18	Support customer service improvements	2	3	12
19	Support customers through real-time online customer service	2	3	15
20	Use social media to deliver customer service	2	3	18
21	Support customers using self-service equipment	2	3	18
22	Provide post-transaction customer service	2	5	22
23	Deal with incidents through a contact centre	2	7	40

The draft units are available in Section 6 of this document.

5 Consultation

The development team would welcome feedback on the proposed **SFJ Awards Level 2 Certificate in Customer Service**.

We are looking for feedback on the following:

- Unit content
- Qualification structure
- Qualification and unit level
- Credit values
- Guided Learning Hours (GLH)
- Total Qualification Time (TQT)¹
- Is the qualification fit for purpose?
- Are there any changes you would recommend?
- Is there anything missing from the qualification?

Please send this consultation on to any colleagues who may also be able to comment on the development.

¹ See Section 8 for information on TQT

Comments can be sent by email and/or comments/tracked changes included on the units.

All feedback should be sent to the Qualifications Team at SFJ Awards by **18 January 2019**.

E-mail: QualificationsTeam@sfjawards.com

Address: SFJ Awards
Consult House
Meadow Court Business Park
4 Hayland Street
Sheffield
S9 1BY

If you have any queries on the consultation, please contact us on the above email or by telephone 0114 284 1970.

6 Draft units

Mandatory Group A

Title	Deliver customer service	
Level	2	
Unit Number	A/506/2130	
Credit Value	5	
GLH	27	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand customer service delivery	1.1 Explain the relationship between customers' needs and expectations and customer satisfaction 1.2 Describe the features and benefits of an organisation's products and/or services 1.3 Explain the importance of treating customers as individuals 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation 1.5 Explain when and to whom to escalate problems 1.6 Describe methods of measuring their own effectiveness in the delivery of customer service	
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to an organisation 2.2 Explain how a brand affects an organisation's customer service offer 2.3 Explain the importance of using customer service language that supports a brand promise 2.4 Identify their own role in ensuring that a brand promise is delivered	

3. Be able to prepare to deal with customers	3.1 Keep up to date with an organisation's products and/or services 3.2 Prepare resources that are necessary to deal with customers before starting work
4. Be able to provide customer service	4.1 Maintain organisational standards of presentation and behaviour when providing customer service 4.2 Adapt their own behaviour to meet customers' needs or expectations 4.3 Respond to customers' requests in line with organisational guidelines 4.4 Inform customers of the progress of their requests 4.5 Confirm that customers' expectations have been met in line with the service offer 4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5. Be able to support improvements to customer service delivery	5.1 Identify ways that customer service could be improved for an organisation and individuals 5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Title	Understand customers	
Level	2	
Unit Number	F/506/2131	
Credit Value	2	
GLH	17	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers	
2. Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty	

Title	Principles of customer service	
Level	2	
Unit Number	TBC	
Credit Value	3 changed due to criteria being taken out	
GLH	22 changed due to criteria being taken out	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand customer service	1.1 Explain the purpose of customer service 1.2 Define the term “service offer” 1.3 Explain the value of a “service offer” to an organisation 1.4 Explain the importance of delivering consistently high-quality customer service 1.5 Explain barriers to providing effective customer service	
2. Understand how legal and ethical requirements relate to customer service	2.1 Describe how health, safety and environmental legislation affects customer service delivery 2.2 Explain how ethical considerations affect customer service 2.3 Explain how equality legislation affects customer service 2.4 Describe how legislation affects the use and storage of customer information	
3. Understand how to deliver effective customer service	3.1 Explain how to identify customers’ needs and expectations 3.2 Explain the importance of managing customers’ expectations 3.3 Explain how to behave in a way that meets customers’ expectations 3.4 Describe techniques that can be used to put customers at ease and gain their trust 3.5 Explain the importance of following up actions and keeping promises when delivering customer service	

4. Understand the management of customer service information	4.1 Explain how customer service information can be used 4.2 Explain the importance of systems to manage customer service information 4.3 Describe the uses of a customer complaints process
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Title	Manage personal performance and development	
Level	2	
Unit Number	L/506/1788	
Credit Value	4	
GLH	18	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 Agree criteria for measuring progress and achievement with line manager 1.3 Complete tasks to agreed timescales and quality standards 1.4 Report problems beyond their own level of competence and authority to the appropriate person 1.5 Take action needed to resolve any problems with personal performance	
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 Explain the benefits of achieving an acceptable “work-life balance”	
3. Be able to identify their own development needs	3.1 Identify organisational policies relating to personal development 3.2 Explain the need to maintain a positive attitude to feedback on performance 3.3 Explain the potential business benefits of personal development 3.4 Identify their own preferred learning style(s)	

	<p>3.5 Identify their own development needs from analyses of the role, personal and team objectives</p> <p>3.6 Use feedback from others to identify their own development needs</p> <p>3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs</p>
<p>4. Be able to fulfil a personal development plan</p>	<p>4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2 Make use of formal development opportunities that are consistent with business needs</p> <p>4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4 Review progress against agreed objectives and amend plans accordingly</p> <p>4.5 Share lessons learned with others using agreed communication methods</p>

Optional Group B

Title	Communicate verbally with customers	
Level	2	
Unit Number	D/506/2119	
Credit Value	3	
GLH	14	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to communicate verbally with customers	1.1 Explain the importance of effective communication in customer service 1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience 1.3 Explain why “customer service language” is used 1.4 Describe different questioning techniques that can be used when communicating with customers 1.5 Describe verbal and non-verbal signals that show how a customer may be feeling 1.6 Describe the types of information needed when communicating verbally with customers	
2. Be able to use customer service language to communicate with customers	2.1 Identify customers’ wants and priorities 2.2 Listen “actively” to what customers are saying 2.3 Communicate clearly, concisely and professionally with customers 2.4 Use a tone of voice and expression that reinforces messages when communicating with customers 2.5 Use language that reinforces empathy with customers 2.6 Adapt their response in accordance with customers’ changing behaviour	

	<ul style="list-style-type: none">2.7 Provide information and advice that meets customers' needs2.8 Maintain organisational standards of behaviour and communication when interacting with customers2.9 Check that customers have understood what has been communicated2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers
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Title	Communicate with customers in writing	
Level	2	
Unit Number	T/506/2126	
Credit Value	3	
GLH	20	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes 1.2 Describe practices for producing different forms of written communications 1.3 Describe the potential benefits and limitations associated with communicating with customers in writing 1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing	
2. Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication 2.2 Gather the information needed to draft the communication 2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer	
3. Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs 3.3 Record decisions and actions taken and the reasons for them	

	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing
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Title	Deal with customers face to face	
Level	2	
Unit Number	TBC	
Credit Value	5	
GLH	33	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to deal with customers face to face.	1.1 Explain the importance of speaking clearly and slowly when dealing with a customer face to face. 1.2 State the importance of taking the time to listen carefully to what the customer is saying. 1.3 Identify the organisation's procedures that impact on the way they are able to deal with their customers face to face. 1.4 Describe the features and benefits of the organisation's services or products. 1.5 Explain the organisation's service offer and how it affects the way they deal with customers face to face. 1.6 Explain the principles of body language that enables them to interpret customer feelings without verbal communication. 1.7 Explain the difference between behaving assertively, aggressively and passively. 1.8 Explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction. 1.9 Describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them.	

<p>2. Be able to communicate effectively with customers</p>	<p>2.1 Plan conversation with customers that have structure and clear direction. 2.2 Hold a conversation with their customer that establishes rapport. 2.3 Focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation. 2.4 Explain their services or products and their organisation's service offer to their customer clearly and concisely. 2.5 Adapt their communication to meet the individual needs of their customer. 2.6 Anticipate their customer's requests and needs for information. 2.7 Balance conflicting demands for their attention whilst maintaining rapport with their current customer. 2.8 Calm down situations when one customer is adversely affecting the customer service enjoyed by other customers.</p>
<p>3. Be able to improve the rapport with their customer through body language.</p>	<p>3.1 Present a professional and respectful image when dealing with their customer. 3.2 Show an awareness of their customer's needs for personal space. 3.3 Focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation. 3.4 Ensure that their customer focus is not disrupted by colleagues. 3.5 Observe all customers and the total customer service situation whilst maintaining rapport with their current customer. 3.6 Observe their customer to read non-verbal clues about the customer's wishes and expectations.</p>

Title	Deal with incoming telephone calls from customers	
Level	2	
Unit Number	H/506/2154	
Credit Value	3	
GLH	16	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to deal with incoming customer calls	1.1 Explain why an organisation should have guidance on dealing with telephone calls 1.2 Explain why an organisation should have an identity checking process 1.3 Explain the importance of keeping customer information up to date 1.4 Explain the importance of keeping customers informed of the progress of their call 1.5 Describe how body language and facial expressions can be detected over the telephone 1.6 Describe different questioning techniques used when dealing with incoming calls 1.7 Explain how to handle abusive calls	
2. Be able to establish the purpose of incoming customer calls	2.1 Verify the identity of callers in line with organisational guidelines 2.2 Speak clearly, concisely and politely using speech and tone to create a rapport 2.3 Adapt their own communication style to meet customers' needs 2.4 Listen actively to what customers are saying to collect as much information as possible 2.5 Use questioning techniques that are appropriate to the conversation 2.6 Record information in line with organisational guidelines	
3. Be able to deal with customer questions and requests	3.1 Respond in a way that best meets customer and organisational requirements 3.2 Give clear and concise information that meets customers' needs 3.3 Manage the length of the conversation	

	3.4 Confirm that the customer is satisfied with the outcomes of the conversation 3.5 Complete agreed post-call follow up actions
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Title	Make telephone calls to customers	
Level	2	
Unit Number	K/506/2155	
Credit Value	3	
GLH	16	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to make telephone calls to customers	1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls 1.2 Explain the importance of keeping customer information up to date 1.3 Explain the reasons for organisational guidance on dealing with telephone calls 1.4 Explain the reasons for organisational identity checking processes 1.5 Explain how body language and facial expressions can be detected over the telephone 1.6 Describe different questioning techniques when dealing with customers 1.7 Explain organisational guidelines for what can and cannot be said or promised 1.8 Explain how to handle abusive calls from customers	
2. Be able to plan telephone calls to customers	2.1 Identify the objective(s) of calls 2.2 Prepare the information needed to make calls 2.3 Plan the structure of calls 2.4 Identify customers' likely responses and how they can be dealt with	
3. Be able to make telephone calls to customers	3.1 Use telecommunications equipment in accordance with organisational standards 3.2 Confirm the identity of customers in line with organisational guidelines 3.3 Make the customer aware of the purpose of the call as early as possible 3.4 Speak clearly, concisely and politely, using speech and tone to create rapport	

	<ul style="list-style-type: none">3.5 Adapt their own communication style to meet customers' needs3.6 Listen actively to what customers are saying to collect as much information as possible3.7 Give clear and concise information that meets customers' needs3.8 Record information in line with organisational guidelines3.9 Complete agreed follow up actions after closing the telephone call
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Title	Promote additional products and/or services to customers	
Level	2	
Unit Number	L/506/2133	
Credit Value	2	
GLH	14	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services 1.2 Explain the importance of keeping product/service knowledge up to date 1.3 Explain how to match products and/or services to customer needs 1.4 Describe techniques to promote additional products and/or services	
2. Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience 2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers 2.3 Provide information to customers that will help them to decide whether to select additional products and/or services 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services	

Title	Process information about customers	
Level	2	
Unit Number	R/506/2134	
Credit Value	3	
GLH	14	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to process customer information	1.1 Describe the functions of customer information systems 1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information 1.3 Explain different responsibilities and levels of authority for processing customer service information 1.4 Explain the reliability of sources of customer information 1.5 Explain the validity of customer information	
2. Be able to process customer information	2.1 Record information about customers in line with organisational standards and procedures 2.2 Keep customer information up to date 2.3 Respond to requests for customer information from authorised people in a timely manner 2.4 Retrieve customer information that meets the requirements of the request 2.5 Supply customer information in a format appropriate for the recipient 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information	

Title	Exceed customer expectations	
Level	2	
Unit Number	Y/506/2135	
Credit Value	3	
GLH	15	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive 1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3 Explain the types of actions that customers are likely to perceive as adding value 1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer	
2. Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer 2.2 Explain the service offer clearly and concisely to customers 2.3 Identify options that offer added value without affecting other customers adversely 2.4 Make offers to customers within their own authority levels 2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer 2.6 Record agreements made and actions taken	

Title	Deliver customer service whilst working on customers' premises	
Level	2	
Unit Number	T/506/2143	
Credit Value	4	
GLH	20	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit 1.2 Explain the importance of being positive about the product and/or service 1.3 Explain organisational standards of presentation, behaviour and communication 1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed 1.5 Explain how to identify possible risks relating to the work to be carried out 1.6 Explain the way in which legislation affects the work to be carried out	
2. Be able to deliver customer service whilst working on customers' premises	2.1 Identify themselves to customers 2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises 2.3 Confirm with customers the nature of work to be carried out on their premises 2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed 2.5 Treat customers, their premises and property with consideration 2.6 Confirm that the customer is satisfied with the outcome 2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises	

Title	Carry out customer service handovers	
Level	2	
Unit Number	T/506/2157	
Credit Value	3	
GLH	15	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand the customer service handover process	1.1 Explain an organisation's customer service handover procedures 1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues 1.3 Explain why, when and how to set reminders to follow up on actions handed over to others 3.1 Explain levels of their own responsibility in the customer service handover process	
2. Be able to plan customer service handovers	2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members 2.2 Agree with colleagues when to pass customer service issues from one person to another 3.2 Agree methods of information exchange	
3. Be able to carry out customer service handovers	3.3 Explain to customers to whom and why a handover is being made 3.4 Exchange information with colleagues in line with organisational procedures 3.5 Check that actions required by others following handovers have been complete 3.6 Identify further actions when the activities required by others have not been completed 3.7 Share feedback with colleagues to make improvements to handover processes	

Title	Resolve customer service problems	
Level	2	
Unit Number	A/506/2158	
Credit Value	5	
GLH	22	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand the resolution of customer service problems	1.1 Describe an organisation's customer service and complaints procedures 1.2 Describe techniques to identify customer service problems and their causes 1.3 Describe techniques to deal with situations where customers become agitated or angry 1.4 Explain the limits of their own authority for resolving customers' problems and making promises 1.5 Explain the purpose of encouraging customers to provide feedback 1.6 Describe methods used to encourage customers to provide feedback	
2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems 2.2 Identify workable options for resolving problems within organisational guidelines 2.3 Use the most appropriate method of communication for dealing with customers 2.4 Agree with customers the option that best meets their needs and those of the organisation 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process 2.7 Share customer feedback with others to improve the resolution of customer service problems	

	2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
3. Be able to manage unresolved customer service problems	3.1 Explain to customers the reasons why problems cannot be resolved 3.2 Refer customers to other sources of help if their problems cannot be resolved

Title	Deliver customer service to challenging customers	
Level	2	
Unit Number	F/506/2159	
Credit Value	3	
GLH	16	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment 1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers 1.3 Explain behaviours that make it challenging to deal with customers 1.4 Explain the difference between assertive and aggressive behaviour 1.5 Describe techniques to deal with customers' challenging behaviour 1.6 Explain their own levels of authority for agreeing actions outside the service offer 1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters	
2. Be able to deal with challenging customers	2.1 Identify the signs that indicate that a customer is challenging 2.2 Express understanding of customers' point of view without admitting liability 2.3 Explain to customers the limits of the service they can offer 2.4 Explain to customers the reasons for an organisation's position and policy 2.5 Agree a way forward that balances customer satisfaction and organisational need 2.6 Obtain help from colleagues when options for action are beyond their level of authority	

	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers
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Title	Develop customer relationships	
Level	2	
Unit Number	Y/506/2149	
Credit Value	3	
GLH	18	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers 1.2 Explain the value of customer loyalty and retention 1.3 Explain how customers' expectations may change over time 1.4 Explain the use of customer feedback as a means of developing customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers 1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships	
2. Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback 2.3 Share feedback from customers with others 2.4 Identify added value that the organisation could offer customers 2.5 Bring to customers' attention products or services that may interest them	

Title	Support customer service improvements	
Level	2	
Unit Number	T/506/2160	
Credit Value	3	
GLH	12	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to support customer service improvements	1.1 Describe different sources of information that may help identify ways of improving customer service 1.2 Describe the constraints on suggesting improvements to customer service 1.3 Explain the limits of their own authority in implementing improvements	
2. Be able to identify the potential for improvements to customer service	2.1 Use information from a range of sources to understand the customer experience 2.2 Identify potential areas where customer service could be improved from an analysis of information 2.3 Make recommendations for improvement that are based on evidence from analysed information	
3. Be able to support the implementation of improvements to customer service	3.1 Implement agreed improvements within the limits of their own authority 3.2 Inform customers of improvements to customer service 3.3 Identify the impact of improvements to customer service and feedback to relevant people	

Title	Support customers through real-time online customer service	
Level	2	
Unit Number	A/506/2161	
Credit Value	3	
GLH	15	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to support customers through real-time online customer service	1.1 Explain how an organisation's online customer service system works 1.2 Explain how to navigate their own customer service site 1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services 1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems	
2. Be able to establish the customer service support needed by customers	2.1 Identify customers' familiarity with the site 2.2 Identify the difficulties faced by customers when navigating websites 2.3 Identify the support for customers that will meet their needs	
3. Be able to support online customer service in real-time	3.1 Step through screen sequences while the customer operates the system 3.2 Communicate with customers in terms they can understand 3.3 Inform customers of what is happening and why certain steps are required 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service	

Title	Use social media to deliver customer service	
Level	2	
Unit Number	J/506/2163	
Credit Value	3	
GLH	18	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand social media in a business environment	1.1 Explain how different social media platforms can be used for customer service 1.2 Describe different audience groups for a range of social media platforms 1.3 Explain the importance of monitoring customer posts in social media networks 1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes 1.5 Explain the etiquette of communication within different social media platforms 1.6 Explain the importance of security settings and how they are used on different social media platforms 1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media	
2. Be able to deal with customers using social media	2.1 Monitor social media to identify customer questions, requests and comments 2.2 Make responses that are appropriate to posts made by customers on social media networks 2.3 Take action to ensure that customers are satisfied before closing dialogue 1.8 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media	

Title	Support customers using self-service equipment	
Level	2	
Unit Number	H/506/2977	
Credit Value	3	
GLH	18	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand how to support customers using self-service equipment	1.1 Explain how the self-service equipment works 1.2 Describe problems that are commonly encountered by customers when using self-service equipment 1.3 Explain demonstration techniques to use when supporting customers using self-service equipment 1.4 Explain organisational procedures for the use of equipment and fault reporting	
2. Be able to identify the help needed by customers using self-service equipment	2.1 Identify signs that show when a customer is having difficulty with the self-service equipment 2.2 Identify a style and level of intervention that meets customers' needs	
3. Be able to help customers to use self-service equipment	3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment 3.2 Use staff override functions to enable self-service equipment to be used by customers 3.3 Explain to customers how to use the equipment and complete the transaction 3.4 Report equipment-related errors and issues to the right person	

Title	Provide post-transaction customer service	
Level	2	
Unit Number	K/506/2978	
Credit Value	5	
GLH	22	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Understand post-transaction customer service	1.1 Explain organisational policies and procedures for post-transaction customer service 1.2 Explain the purposes and range of post-transaction activities 1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service 1.4 Explain how legislation and regulation affect customers' rights 1.5 Explain the advantages and disadvantages of post-transaction customer service programmes	
2. Be able to provide post-transaction customer service	2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines 2.2 Use unplanned opportunities post-transaction to provide customer service 2.3 Identify reasons for contacting customers post-transaction 2.4 Confirm customers' levels of satisfaction post-transaction 2.5 Make recommendations to decision makers to enhance customer satisfaction 2.6 Present a professional and helpful image	

Title	Deal with incidents through a contact centre	
Level	2	
Unit Number	K/503/0421	
Credit Value	7	
GLH	40	
Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	
1. Be able to deal with incidents through a contact centre	1.1 Respond to incoming calls in a calm and professional manner 1.2 Maintain control of the conversation 1.3 Record the contact and information in an incident log in accordance with organisational procedures 1.4 Assess and prioritise reported incidents in accordance with organisational procedures 1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures 1.6 Provide information, advice and support in response to requests in accordance with organisational procedures 1.7 Escalate incident responses in accordance with organisational procedures	
2. Be able to use contact centre communications systems to deploy incident management resources	2.1 Communicate with external organisations in accordance with organisational procedures 2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident 2.3 Use agreed conventions of wording, style and approach appropriate for different communication media	

<p>3. Understand how to deal with incidents in a contact centre</p>	<p>3.1 Describe the incident management services offered by the contact centre</p> <p>3.2 Describe the impact of regulation or legislation on incident management</p> <p>3.3 Describe the purpose and use of decision trees</p> <p>3.4 Describe how to determine the appropriate allocation of resources to incidents</p> <p>3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response</p> <p>3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident</p> <p>3.7 Describe standard wording and codes used by the organisation when dealing with incident management</p> <p>3.8 Describe the type and extent of resources available for deployment in incident management</p>
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7 Level Descriptors²

Level	Knowledge Descriptor (the learner...)	Skills Descriptor (the learner can...)
2	<p>Has knowledge and understanding of facts, procedures and ideas in an area of study or field of work to complete well-defined tasks and address straightforward problems.</p> <p>Can interpret relevant information and ideas.</p> <p>Is aware of a range of information that is relevant to the area of study or work.</p>	<p>Select and use relevant cognitive and practical skills to complete well-defined, generally routine tasks and address straightforward problems.</p> <p>Identify, gather and use relevant information to inform actions.</p> <p>Identify how effective actions have been.</p>

² Qualification and Component Levels, Ofqual November 2018
<https://www.gov.uk/guidance/ofqual-handbook/section-e-design-and-development-of-qualifications>

8 Total Qualification Time (TQT)

Values for Total Qualification Time³, including Guided Learning, are calculated by considering the different activities that Learners would typically complete to achieve and demonstrate the learning outcomes of a qualification. They do not include activities which are required by a Learner's Teacher based on the requirements of an individual Learner and/or cohort. Individual Learners' requirements and individual teaching styles mean there will be variation in the actual time taken to complete a qualification. Values for Total Qualification Time, including Guided Learning, are estimates.

Some examples of activities which can contribute to Total Qualification Time include

- Independent and unsupervised research/learning
- Unsupervised compilation of a portfolio of work experience
- Unsupervised e-learning
- Unsupervised e-assessment
- Unsupervised coursework
- Watching a pre-recorded podcast or webinar
- Unsupervised work-based learning
- All Guided Learning

Some examples of activities which can contribute to Guided Learning include:

- Classroom-based learning supervised by a Teacher
- Work-based learning supervised by a Teacher
- Live webinar or telephone tutorial with a Teacher in real time
- E-learning supervised by a Teacher in real time
- All forms of assessment which take place under the Immediate Guidance or Supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training, including where the assessment is competence-based and may be turned into a learning opportunity.

³ Total Qualification Time, Ofqual November 2018
<https://www.gov.uk/guidance/ofqual-handbook/section-e-design-and-development-of-qualifications>