

SFJ Awards Level 2 Certificate in Customer Service

Qualification Handbook

SFJ Awards Level 2 Certificate in Customer Service

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1 Introduction

1.1 About us

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.

1.2 Customer Service Statement

Our Customer Service Statement is published on SFJ Awards website giving the minimum level of service that centres can expect. The Statement will be reviewed annually and revised as necessary in response to customer feedback, changes in legislation, and guidance from the qualifications Regulators.

1.3 Centre support

SFJ Awards works in partnership with its customers. For help or advice contact:

SFJ Awards Consult House Meadowcourt Business Park 4 Hayland Street Sheffield S9 1BY

Tel: 0114 284 1970 E-mail: <u>info@sfjawards.com</u> Website: <u>www.sfjawards.com</u>

2 The Qualification

2.1 Qualification objective

This handbook relates to the following qualification:

SFJ Awards Level 2 Certificate in Customer Service

The main objective of this qualification is to enable learners to develop their knowledge and skills in the workplace in customer service roles, which will include:

- Understanding the needs of customers and their employer
- Communicating effectively with customers face to face, in writing, or by telephone
- Resolving problems and improving customer relations
- Promoting products and services
- Working in a team
- Developing complementary technical skills according to job role

2.2 Pre-entry requirements

There are no pre-entry requirements for enrolling to complete this qualification.

2.3 Qualification structure

This qualification is made up of 4 mandatory units and a range of various optional units to allow selection of those appropriate to the context. To be awarded this qualification the learner must achieve a total of 27 credits, 14 mandatory and 13 optional credits, as shown in the tables below.

Mandatory Group A						
Unit Number	Odyssey Reference	Unit Title	Level	GLH	Credit Value	
A/506/2130	882	Deliver customer service	2	27	5	
F/506/2131	883	Understand customers	2	17	2	

Mandatory Group A					
Unit Number	Odyssey Reference	Unit Title	Level	GLH	Credit Value
M/617/4417	1367	Principles of customer service	2	22	3
L/506/1788	861	861 Manage personal performance and development		18	4

Optional Gro	Optional Group B							
Unit Number			Level	GLH	Credit Value			
D/506/2119	891	Communicate verbally with customers	2	14	3			
T/506/2126	892	Communicate with customers in writing	2	20	3			
T/617/4418	1368	Deal with customers face to face	2	33	5			
H/506/2154	893	Deal with incoming telephone calls from customers	2	16	3			
K/506/2155	894	Make telephone calls to customers	2	16	3			
L/506/2133	895	Promote additional products and/or services to customers	2	14	2			
R/506/2134	896	Process information about customers	2	14	3			
Y/506/2135	897	Exceed customer expectations	2	15	3			
T/506/2143	898	Deliver customer service whilst working on customers' premises	2	20	4			

Optional Gro	Optional Group B							
Unit Number	Odyssey Reference	Unit Title		GLH	Credit Value			
T/506/2157	899	Carry out customer service handovers	2	15	3			
A/506/2158	884	Resolve customer service problems	2	22	5			
F/506/2159	900	Deliver customer service to challenging customers	2	16	3			
Y/506/2149	901	Develop customer relationships	2	18	3			
T/506/2160	902	Support customer service improvements	2	12	3			
A/506/2161	903	Support customers through real-time online customer service	2	15	3			
J/506/2163	904	Use social media to deliver customer service	2	18	3			
H/506/2977	906	Support customers using self-service equipment	2	18	3			
K/506/2978	907	Provide post-transaction customer service	2	22	5			
K/503/0421	915	Deal with incidents through a contact centre	2	40	7			

2.4 Total Qualification Time (TQT)

Values for Total Qualification Time1, 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.

The Total Qualification Time and Guided Learning Hours for this qualification are as follows:

Qualification Title	ΤQΤ	GLH
SFJ Awards Level 2 Certificate in Customer Service	270	142

2.4 Age restriction

This qualification is available to learners aged 16 years and over.

2.5 Opportunities for progression

This qualification creates a number of opportunities for progression, for example:

¹ Total Qualification Time, Ofqual November 2018

https://www.gov.uk/guidance/ofqual-handbook/section-e-design-and-development-of-qualifications

- Further education to undertake customer service, business related or other qualifications
- With additional training, learners may be able to progress in their careers to roles including Customer Relationship Manager, Customer Service Executive Officer, Customer Service Delivery Co-ordinator, Customer Service Team Leader, Customer Service Supervisors and Managers, Senior Customer Service Advisers or a wide range of other Customer Service related roles.

2.6 Use of languages

SFJ Awards business language is English and we provide assessment materials and qualification specifications that are expressed in English. Assessment specifications and assessment materials may be requested in Welsh or Irish and, where possible, SFJ Awards will try to fulfil such requests. SFJ Awards will provide assessment materials and qualification specifications that are expressed in Welsh or Irish and support the assessment of those learners, where the number of learners makes it economically viable for SFJ Awards to do so. More information is provided in the SFJ Awards' Use of Language Policy.

For learners seeking to take a qualification and be assessed in British Sign Language or Irish Sign Language, please refer to SFJ Awards' Reasonable Adjustments Policy. A learner may be assessed in British Sign Language or Irish Sign Language where it is permitted by SFJ Awards for the purpose of Reasonable Adjustment.

Policies are available on our website <u>www.sfjawards.com</u> or on request from SFJ Awards.

3 Qualification Units

Mandatory Group A

Title	Deliver custom	Deliver customer service			
Level	2				
Unit Number	A/506/2130				
Credit Value	5				
GLH	27				
Learning Outcon	nes	Assessment Criteria			
The learner will:		The learner can:			
 Understand customer service delivery 		 Explain the relationship between customers' needs and expectations and customer satisfaction Describe the features and benefits of an organisation's products and/or services Explain the importance of treating customers as individuals Explain the importance of balancing promises made to customers with the needs of an organisation Explain when and to whom to escalate problems Describe methods of measuring their own effectiveness in the delivery of customer service 			
2. Understand th between custo 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 pre with customer		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	5.1	Identify ways that customer service could be improved for an organisation and individuals
	service delivery	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 Outco	mes	Assessment Criteria			
The learner will:	,	The learner can:			
 Understand different types of customers 		 Explain the distinctions between internal and external customers Explain how cultural factors can affect customers' expectations Describe the characteristics of challenging customers 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 c	ustomer service				
Level	2					
Unit Number	M/617/4417					
Credit Value	3					
GLH	22	22				
Learning Outcon		Assessment Criteria <i>The learner can:</i>				
1. Understand customer service		 Explain the purpose of customer service Define the term "service offer" Explain the value of a "service offer" to an organisation Explain the importance of delivering consistently high-quality customer service 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 				

Title	Manage perso	onal performance and development
Level	2	
Unit Number L/506/1788		
Credit Value	4	
GLH	18	
Learning Outcon	nes	Assessment Criteria
The learner will:		The learner can:
 Be able to manage personal performance 		 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager Agree criteria for measuring progress and achievement with line manager Complete tasks to agreed timescales and quality standards Report problems beyond their own level of competence and authority to the appropriate person Take action needed to resolve any problems with personal performance
2. Be able to ma own time and	•	 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 ider development r	-	 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) 3.5 Identify their own development needs from analyses of the role, personal and team objectives 3.6 Use feedback from others to identify their own development needs 3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development

 4. Be able to fulfil a personal development plan 4.1 Agree a personal development plan that specifie actions, methods, resources, timescales and review mechanisms 4.2 Make use of formal development opportunities 				objectives that align with organisational and personal needs
 that are consistent with business needs 4.3 Use informal learning opportunities that contribut to the achievement of personal development objectives 4.4 Review progress against agreed objectives and amend plans accordingly 4.5 Share lessons learned with others using agreed communication methods 	4.	•	4.2 4.3 4.4	review mechanisms Make use of formal development opportunities that are consistent with business needs Use informal learning opportunities that contribute to the achievement of personal development objectives Review progress against agreed objectives and amend plans accordingly Share lessons learned with others using agreed

Optional Group B

Title	Communicate	verbally with customers
Level	2	
Unit Number	D/506/2119	
Credit Value	3	
GLH	14	
Learning Outco	nes	Assessment Criteria
The learner will:		The learner can:
 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 2.7 Provide information and advice that meets customers' needs 2.8 Maintain organisational standards of behaviour and communication when interacting with customers 2.9 Check that customers have understood what has been communicated

2.10 Adhere to organisational policies and procedures,
legal and ethical requirements when
communicating verbally with customers

Title	Communicate with customers in writing	
Level	2	
Unit Number T/506/2126		
Credit Value	3	
GLH	20	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
 Understand how to communicate with customers in writing 		 Explain why it is necessary to use different forms of written communication for different purposes Describe practices for producing different forms of written communications Describe the potential benefits and limitations associated with communicating with customers in writing 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

Title	Deal with cust	omers face to face
Level	2	
Unit Number	T/617/4418	
Credit Value	5	
GLH	33	
Learning Outcon	nes	Assessment Criteria
The learner will:		The learner can:
1. Understand he with customer		 Explain the importance of speaking clearly and slowly when dealing with a customer face to face. State the importance of taking the time to listen carefully to what the customer is saying. Identify the organisation's procedures that impact on the way they are able to deal with their customers face to face. Describe the features and benefits of the organisation's services or products. Explain the organisation's service offer and how it affects the way they deal with customers face to face. Explain the principles of body language that enables them to interpret customer feelings without verbal communication. Explain the difference between behaving assertively, aggressively and passively. Explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction. Describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them.
2. Be able to cor effectively with		 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.

		1	
		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.
3.	Be able to improve the	3.1	Present a professional and respectful image
	rapport with their customer through body language.	0.1	when dealing with their customer.
		3.2	Show an awareness of their customer's needs for
		0.2	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.
L		1	

Title	Deal with incoming telephone calls from customers			
Level	2			
Unit Number H/506/2154				
Credit Value	3			
GLH	16			
Learning Outcom	mes	Assessment Criteria		
The learner will:	;	The learner can:		
1. Understand h with incoming 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 de customer que 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 		

Title	Make telephone calls to customers	
Level	2	
Unit Number	K/506/2155	
Credit Value	3	
GLH	16	
Learning Outco	mes	Assessment Criteria
The learner will:	,	The learner can:
 Understand how to make telephone calls to customers 		 Explain the legislation and regulations relating to the use of customer information when planning to make calls Explain the importance of keeping customer information up to date Explain the reasons for organisational guidance on dealing with telephone calls Explain the reasons for organisational identity checking processes Explain how body language and facial expressions can be detected over the telephone Describe different questioning techniques when dealing with customers Explain organisational guidelines for what can and cannot be said or promised 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 3.5 Adapt their own communication style to meet customers' needs 3.6 Listen actively to what customers are saying to collect as much information as possible

3.7	Give clear and concise information that meets customers' needs
3.8	Record information in line with organisational guidelines
3.9	Complete agreed follow up actions after closing the telephone call

Title	Promote additional products and/or services to customers			
Level	2			
Unit Number	L/506/2133			
Credit Value	2			
GLH	14			
Learning Outcomes		Assessment Criteria		
The learner will:		The learner can:		
 Understand the promotion of additional products and/or services to customers 		 Describe organisational policies and procedures on the promotion of additional products and/or services Explain the importance of keeping product/service knowledge up to date Explain how to match products and/or services to customer needs 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 Outco	nes	Assessment Criteria
The learner will:	,	The learner can:
1. Understand how to process customer information		 Describe the functions of customer information systems Explain the way in which legislation and regulatory requirements affect the processing of customer information Explain different responsibilities and levels of authority for processing customer service information Explain the reliability of sources of customer information 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 Outcon	nes	Assessment Criteria	
The learner will:		The learner can:	
 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 custon	ner service whilst working on customers' premises
Level	2	
Unit Number	T/506/2143	
Credit Value	4	
GLH	20	
Learning Outcor	nes	Assessment Criteria
The learner will:		The learner can:
 Understand how to deliver customer service whilst working on customers' premises 		 Describe the preparations that need to be made prior to a visit Explain the importance of being positive about the product and/or service Explain organisational standards of presentation, behaviour and communication Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed Explain how to identify possible risks relating to the work to be carried out 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 Outcom The learner will:		Assessment Criteria The learner can:
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 1.4 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 2.3 Agree methods of information exchange
3. Be able to carry out customer service handovers		 3.1 Explain to customers to whom and why a handover is being made 3.2 Exchange information with colleagues in line with organisational procedures 3.3 Check that actions required by others following handovers have been complete 3.4 Identify further actions when the activities required by others have not been completed 3.5 Share feedback with colleagues to make improvements to handover processes

Title	Resolve custo	mer service problems
Level	2	
Unit Number	A/506/2158	
Credit Value	5	
GLH	22	
Learning Outco	mes	Assessment Criteria
The learner will	:	The learner can:
 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
 Be able to ma unresolved c service probl 	ustomer	3.1 Explain to customers the reasons why problems cannot be resolved3.2 Refer customers to other sources of help if their problems cannot be resolved

Title	Deliver custon	ner service to challenging customers
Level	2	
Unit Number	F/506/2159	
Credit Value	3	
GLH	16	
Learning Outco	mes	Assessment Criteria
The learner will:	;	The learner can:
1. Understand the customer served challenging c	vice to	 Describe different types of challenging customers in the customer service environment Explain an organisation's procedures and standards of behaviour for dealing with challenging customers Explain behaviours that make it challenging to deal with customers Explain the difference between assertive and aggressive behaviour Describe techniques to deal with customers' challenging behaviour Explain their own levels of authority for agreeing actions outside the service offer 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

Title	Develop custo	mer relationships
Level	2	
Unit Number	Y/506/2149	
Credit Value	3	
GLH	18	
Learning Outcor	nes	Assessment Criteria
The learner will:		The learner can:
1. Understand h customer rela	•	 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 dev relationships 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 Outcon	nes	Assessment Criteria
The learner will:		The learner can:
 Understand he customer serv improvements 	ice	 Describe different sources of information that may help identify ways of improving customer service Describe the constraints on suggesting improvements to customer service 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 sup implementatio improvements service	n of	 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 Outco	mes	Assessment Criteria
The learner will:	;	The learner can:
 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 me	dia to deliver customer service
Level	2	
Unit Number	J/506/2163	
Credit Value	3	
GLH	18	
Learning Outcomes The learner will:		Assessment Criteria The learner can:
1. Understand s a business er		 Explain how different social media platforms can be used for customer service Describe different audience groups for a range of social media platforms Explain the importance of monitoring customer posts in social media networks Explain organisational policy and guidelines for the use of social media for customer service purposes Explain the etiquette of communication within different social media platforms Explain the importance of security settings and how they are used on different social media platforms Identify the information that can be shared when colleagues are involved in exchanges using social media
2. Be able to dea customers us 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 2.4 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 Outcou The learner will:		Assessment Criteria The learner can:
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 Outco	mes	Assessment Criteria
The learner will:		The learner can:
 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		Assessment Criteria	
The learner will:		The learner can:	
 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 	
3. Understand how to deal with incidents in a contact centre		 3.1 Describe the incident management services offered by the contact centre 3.2 Describe the impact of regulation or legislation on incident management 3.3 Describe the purpose and use of decision trees 3.4 Describe how to determine the appropriate allocation of resources to incidents 3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response 	

3.6	Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
3.7	Describe standard wording and codes used by the organisation when dealing with incident management
3.8	Describe the type and extent of resources available for deployment in incident management

4 Centre Requirements

Centres must be approved by SFJ Awards and also have approval to deliver the qualifications they wish to offer. This is to ensure centres have the processes and resources in place to deliver the qualifications. Approved centres must adhere to the requirements detailed in the SFJ Awards Centre Handbook, which includes information for centres on assessment and internal quality assurance (IQA) processes and procedures and is available in the centres' area of the SFJ Awards website <u>http://sfjawards.com/approved-centres</u>.

Centres are responsible for ensuring that their assessor and internal quality assurance staff:

- are occupationally competent and/or knowledgeable as appropriate to the assessor or IQA role they are carrying out
- have current experience of assessing/internal quality assuring as appropriate to the assessor or IQA role they are carrying out, and
- have access to appropriate training and support.

Information on the induction and continuing professional development of those carrying out assessment and internal quality assurance must be made available by centres to SFJ Awards through the external quality assurance process.

This qualification handbook should be used in conjunction with the SFJ Awards Centre Handbook, the SFJ Awards Assessment Policy and the SFJ Awards Quality Assurance (Internal and External) Policy. All policies are available on the website <u>www.sfjawards.com</u> or on request from SFJ Awards.

5 Assessment

5.1 Qualification assessment methods

Assessment methods that can be used for the SFJ Awards Level 2 Certificate in Customer Service are as follows:

- Portfolio of Evidence (including for example records of professional discussions, question and answer sessions, reflective accounts)
- Practical Demonstration / Assignment

5.2 Assessor and internal quality assurer and requirements

5.2.1 Occupational knowledge and competence

All assessors, internal and external quality assurers must:

- be occupationally knowledgeable across the range of units for which they are responsible prior to commencing the role
- engage in continuous professional development activities to maintain:
 - occupational competence and knowledge by keeping up-to-date with the changes taking place in the sector(s) for which they carry out assessments
 - professional competence and knowledge.

Assessors must also:

- be occupationally competent in the functions covered by the units they are assessing
- have gained their occupational competence by working in the sector relating to the units or qualifications they are assessing. This means they must be able to demonstrate consistent application of the skills and the current supporting knowledge and understanding in the context of a recent role directly related to the qualification units they are assessing as a practitioner, trainer or manager
- be able to interpret and make judgements on current working practices and technologies within the area of work.

Internal quality assurers (IQAs) must also:

- understand the nature and context of the assessors' work and that of their learners. This means that they must have worked closely with staff who carry out the functions covered by the qualifications, possibly by training or supervising them, and have sufficient knowledge of these functions to be able to offer credible advice on the interpretation of the units
- understand the content, structure and assessment requirements for the qualification(s) they are internal quality assuring*.

*Centres should provide IQAs with an induction to the qualifications that they are responsible for quality assuring. IQAs should also have access to ongoing training and updates on current issues relevant to these qualifications.

Approved centres will be required to provide SFJ Awards with current evidence of how each member of their team meets these requirements, for example certificates of achievement or testimonials.

5.2.2 Assessor competence

Assessors must be able to make valid, reliable and fair assessment decisions. To demonstrate their competence, assessors must be:

- qualified with a recognised assessor qualification, or
- working towards a recognised assessor qualification, or
- able to prove equivalent competence through training to appropriate national standards, for example, National Occupational Standard 9: Assess learner achievement² or Police Sector Standard for the Training of Assessors, Assessor Standard.

Approved centres will be required to provide SFJ Awards with current evidence of how each assessor meets these requirements, for example certificates of achievement or testimonials.

5.2.3 Internal Quality Assurer competence

IQAs must occupy a position in the organisation that gives them the authority and resources to:

- coordinate the work of assessors
- provide authoritative advice
- call meetings as appropriate
- conduct pre-delivery internal quality assurance on centre assessment plans, for example, to ensure that any proposed simulations are fit for purpose
- visit and observe assessment practice
- review the assessment process by sampling assessment decisions
- ensure that assessment has been carried out by assessors who are occupationally competent, or for knowledge-based qualifications occupationally knowledgeable, in the area they are assessing
- lead internal standardisation activity
- resolve differences and conflicts on assessment decisions.

To demonstrate their competence, IQAs must be:

- qualified with a recognised internal quality assurance qualification, or
- working towards a recognised internal quality assurance qualification, or

 ² National Occupational Standards for Learning and Development, LLUK 2010 <u>https://www.excellencegateway.org.uk/</u>
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 able to prove equivalent competence through training to appropriate national standards, for example National Occupational Standard 11: Internally monitor and maintain the quality of assessment³ or Police Sector Standard for the Training of Internal Verifiers, Internal Verifier Standard.

Approved centres will be required to provide SFJ Awards with current evidence of how each IQA meets these requirements, for example certificates of achievement or testimonials.

5.3 Expert witnesses

Expert witnesses, for example line managers and supervisors, can provide evidence that a learner has demonstrated competence in an activity. Their evidence contributes to performance evidence and has parity with assessor observation. Expert witnesses do not however perform the role of assessor.

5.3.1 Occupational competence

Expert witnesses must, according to current sector practice, be competent in the functions covered by the units for which they are providing evidence.

They must be able to demonstrate consistent application of the skills and the current supporting knowledge and understanding in the context of a recent role directly related to the qualification unit that they are witnessing as a practitioner, trainer or manager.

5.3.2 Qualification knowledge

Expert witnesses must be familiar with the qualification unit(s) and must be able to interpret current working practices and technologies within the area of work.

5.4 Assessing competence

The purpose of assessing competence is to make sure that an individual is competent to carry out the activities required in their work. Assessors gather and judge evidence during normal work activities to determine whether the learner demonstrates their competence against the standards in the qualification unit(s). Competence should be demonstrated at a level appropriate to the qualification. The skills required at the different qualification levels are defined in Ofqual's level descriptors.⁴ Further information on qualification levels is included in the SFJ Awards Assessment Policy.

Evidence must be:

- Valid
- Authentic

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<sup>4</sup> Qualification and Component Levels, Ofqual November 2019,
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https://www.gov.uk/guidance/ofqual-handbook/section-e-design-and-development-of-qualifications

³ National Occupational Standards for Learning and Development, LLUK 2010 https://www.excellencegateway.org.uk/

- Sufficient
- Current
- Reliable.

Assessment should be integrated into everyday work to make the most of opportunities that arise naturally within the workplace.

5.5 Methods for assessing competence

Qualifications may be assessed using any method, or combination of methods in Section 5.1, which clearly demonstrate that the learning outcomes and assessment criteria have been met.

Assessors need to be able to select the right assessment methods for the competences that are being assessed, without overburdening the learner or the assessment process, or interfering with everyday work activities. SFJ Awards expects assessors to use a combination of different assessment methods to make decisions about an individual's occupational competence. Further information on assessment methods is provided below and in the SFJ Awards Assessment Policy.

5.5.1 Observation

SFJ Awards believes that direct observation in the workplace by an assessor or testimony from an expert witness is preferable as it allows for authenticated, valid and reliable evidence. Where learners demonstrate their competence in a real work situation, this must be done without the intervention from a tutor, supervisor or colleague.

However, SFJ Awards recognises that alternative sources of evidence and assessment methods may have to be used where direct observation is not possible or practical.

5.5.2 Testimony of witnesses and expert witnesses

Witness testimonies are an accepted form of evidence by learners when compiling portfolios. Witness testimonies can be generated by peers, line managers and other individuals working closely with the learner. Witnesses are defined as being those people who are occupationally expert in their role.

Testimony can also be provided by expert witnesses who are occupationally competent and familiar with the qualification/unit(s)/criteria. Expert witnesses are the preferred witness type recommended by SFJ Awards as they provide a stronger form of evidence which is more easily authenticated and verified.

The assessor should consider witness testimonies of either type as a typical form of evidence. Assessors are therefore responsible for making the final judgement in terms of the learner meeting the evidence requirements of the qualification/unit(s)/criteria.

5.5.3 Work outputs (product evidence)

Examples of work outputs include plans, reports, budgets, photographs, videos or notes of an event. Assessors can use work outputs in conjunction with other assessment methods, such as observation and discussion, to confirm competence and assure authenticity of the evidence presented.

5.5.4 Professional discussion

Professional discussions are a free-flowing two-way dialogue between the assessor and learner. It should not be confused with questioning where the assessor asks specific questions and the learner provides answers. Discussions allow the learner to describe and reflect on their performance and knowledge in relation to the standards. Assessors can use discussions to test the authenticity, validity and reliability of a learner's evidence. Written/audio/electronic records of discussions must be maintained.

5.5.5 Questioning the learner

Questioning can be carried out orally or in written form and used to cover any gaps in assessment or corroborate other forms of evidence. Written/audio/electronic records of all questioning must be maintained.

5.5.6 Simulations

Simulations may take place either in an operational or non-operational environment, for example a training centre, or in the learner's workplace. Proposed simulations must be reviewed to ensure they are fit for purpose as part of the IQA's pre-delivery activity.

Simulations can be used when:

- the employer or assessor consider that evidence in the workplace will not be demonstrated within a reasonable timeframe
- there are limited opportunities to demonstrate competence in the workplace against all the assessment criteria
- there are health and safety implications due to the high risk nature of the work activity
- the work activity is non-routine and assessment cannot easily be planned for
- assessment is required in more difficult circumstances than is likely to happen day to day.

Simulations must follow the principles below:

- 1. The nature of the contingency and the physical environment for the simulation must be realistic
- 2. Learners should be given no indication as to exactly what contingencies they may come across in the simulation
- 3. The demands on the learner during the simulation should be no more or less than they would be in a real work situation

- 4. Simulations must be planned, developed and documented by the centre in a way that ensures the simulation correctly reflects what the specific qualification unit seeks to assess and all simulations should follow these documented plans
- 5. There should be a range of simulations to cover the same aspect of a unit and they should be rotated regularly.

5.6 Assessing knowledge and understanding

Knowledge-based assessment involves establishing what the learner knows or understands at a level appropriate to the qualification. The depth and breadth of knowledge required at the different qualification levels are defined in Ofqual's level descriptors.⁵ Further information on qualification levels is included in the SFJ Awards Assessment Policy.

Assessments must be:

- Fair
- Robust
- Rigorous
- Authentic
- Sufficient
- Transparent
- Appropriate.

Good practice when assessing knowledge includes use of a combination of assessment methods to ensure that as well as being able to recall information, the learner has a broader understanding of its application in the workplace. This ensures that qualifications are a valid measure of a learner's knowledge and understanding.

A proportion of any summative assessment may be conducted in controlled environments to ensure conditions are the same for all learners. This could include use of:

- Closed book conditions, where learners are not allowed access to reference materials
- Time bound conditions
- Invigilation.

5.7 Methods for assessing knowledge and understanding

Qualifications may be assessed using any method, or combination of methods in Section 5.1, which clearly demonstrate that knowledge-based learning outcomes and assessment criteria have been met. Evidence of assessment, examples listed below, can be included in a portfolio of evidence.

⁵ Qualification and Component Levels: Requirements and Guidance for All Awarding Organisations and All Qualifications, Ofqual 2015 <u>www.gov.uk/government/publications/qualification-and-</u> <u>component-levels</u>

- a) Written tests in a controlled environment
- b) Multiple choice questions
- c) Evidenced question and answer sessions with assessors
- d) Evidenced professional discussions
- e) Written assignments (including scenario-based written assignments).

Where written assessments are used centres must maintain a bank of assessments that are sufficient to be changed regularly.

5.8 Assessment planning

Planning assessment allows a holistic approach to be taken. Holistic assessments are those which focus on assessment of the learner's work activity as a whole. This means that the assessment:

- reflects the skills requirements of the workplace
- saves time and streamlines processes
- makes the most of naturally occurring evidence opportunities.

Planning assessment enables assessors to track learners' progress and incorporate feedback into the learning process. By effectively planning assessors can therefore be sure that learners have had sufficient opportunity to acquire the skills and knowledge to perform competently and consistently to the standards before being assessed. As a consequence the assessment is a more efficient, cost effective process which minimises the burden on learners, assessors and employers.

5.9 Standardisation

Internal and external standardisation is required to ensure the consistency of evidence, assessment decisions and qualifications awarded over time. Written/audio/electronic records of all standardisation must be maintained, including records of all involved parties.

IQAs should facilitate internal standardisation events for assessors to attend and participate to review evidence used, make judgments, compare quality and come to a common understanding of what is sufficient. In addition, it is also good practice to participate in external standardisation activities. SFJ Awards will facilitate external standardisation events which are open to centres and their teams.

Further information on standardisation is available in the SFJ Awards Quality Assurance (Internal and External) Policy and the SFJ Awards Standardisation Policy.

5.10 Recognition of Prior Learning (RPL)

Recognition of prior learning (RPL) is the process of recognising previous formal, informal or experiential learning so that the learner avoids having to repeat learning/assessment within a new qualification. RPL is a broad concept and covers a range of possible approaches and

outcomes to the recognition of prior learning (including credit transfer where an awarding organisation has decided to attribute credit to a qualification).

The use of RPL encourages transferability of qualifications and/or units, which benefits both learners and employers. SFJ Awards supports the use of RPL and centres must work to the principles included in Section 6 Assessment and Quality Assurance of the SFJ Awards Centre Handbook and outlined in SFJ Awards Recognition of Prior Learning Policy.

5.11 Equality and diversity

Centres must comply with legislation and the requirements of the RQF relating to equality and diversity. There should be no barriers to achieving a qualification based on:

- Age
- Disability
- Gender
- Gender reassignment
- Marriage and civil partnerships

- Pregnancy and maternity
- Race
- Religion and belief
- Sexual orientation

Reasonable adjustments are made to ensure that learners who have specific learning needs are not disadvantaged in any way. Learners must declare their needs prior to the assessment and all necessary reasonable adjustment arrangements must have been approved by SFJ Awards and implemented before the time of their assessment.

Further information is available in the SFJ Awards Reasonable Adjustments and Special Considerations Policy and the SFJ Awards Equality of Opportunity Policy.

5.12 Health and safety

SFJ Awards is committed to safeguarding and promoting the welfare of learners, employees and volunteers and expect everyone to share this commitment.

SFJ Awards fosters an open and supportive culture to encourage the safety and well-being of employees, learners and partner organisations to enable:

- learners to thrive and achieve
- employees, volunteers and visitors to feel secure
- everyone to feel assured that their welfare is a high priority.

Assessment of competence based qualifications in the justice sector can carry a high-risk level due to the nature of some roles. Centres must therefore ensure that due regard is taken to assess and manage risk and have procedures in place to ensure that:

- qualifications can be delivered safely with risks to learners and those involved in the assessment process minimised as far as possible
- working environments meet relevant health and safety requirements.

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