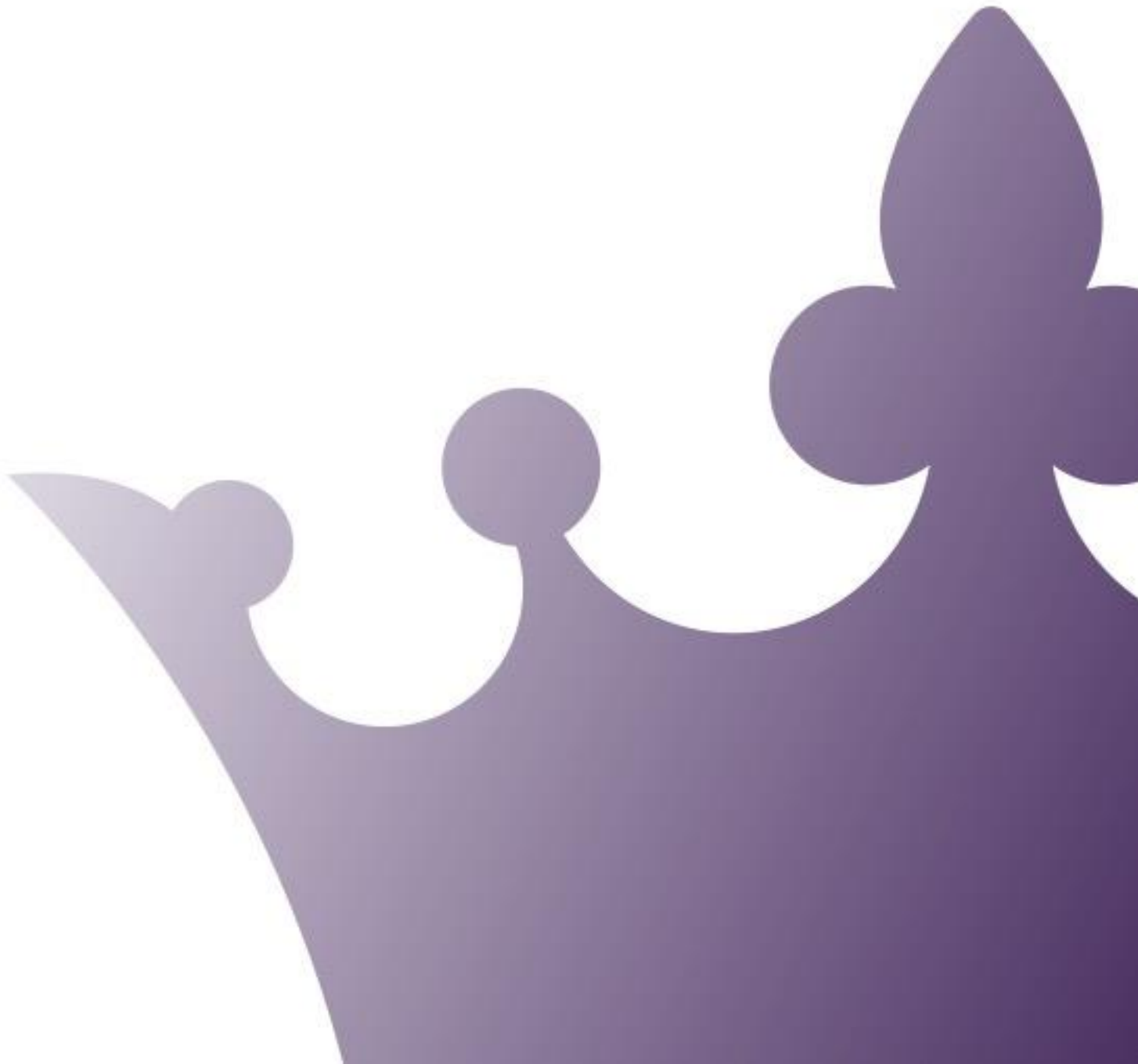# Level 2 Diploma in Customer Service

Qualification Handbook

SFJ Awards Level 2 Diploma in Customer Service

Qualification Number: 601/4310/1
Operation Start Date: 1 September 2014

Version	Date of issue	Amendment(s)	Page
V6	19.08.22	Withdrawal date	5
V5			
V4	21.07.17	Add Total Qualification Time	9
		Update Section 1 to include reference Skills for Health and remove fax number	4
V3	09.12.15	Update SFJ Awards contact details	4
		Remove references to QCF	Various

Contents

1   Introduction

1.1   About us

SFJ Awards is part of the Skills for Health and Justice Group. 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 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, and understands the specific challenges facing the Policing, Community Safety, Legal, Armed Forces and Health sectors, 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, customer-led service, providing excellent value for money.

1.2   Customer Service Charter

Our Customer Service Charter is published on SFJ Awards website giving the minimum level of service that Centres can expect. The Charter 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: info@sfjawards.com
Website: www.sfjawards.com

2 The Qualification

* Qualification Withdrawal *

Please note that the SFJ Awards Level 2 Diploma in Customer Service is being withdrawn. No learners can therefore be registered on this qualification after 30 September 2022 and all certifications must be completed by 30 September 2023.

2.1 Overall Objective for the Qualification

This handbook relates to the following qualification:

- SFJ Awards Level 2 Diploma 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

The qualification is mapped to the Customers Service National Occupational Standards[1] and is included on the Intermediate Level Apprenticeship in Customer Service[2].

2.2 Pre-entry Requirements

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

2.3 Units and Rules of Combination

Level 2 Diploma in Customer Service

Learners must successfully complete 45 credits to achieve this qualification. There are five mandatory units which provide a total of 19 credits. The learner must also complete a minimum of 3 credits from Optional Group B and a minimum of 16 credits from Optional Group C. A maximum of 7 credits can be taken from Optional Group D.

The units are listed in the following tables.

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[1] Customers Service National Occupational Standards, Skills CFA (2013) www.skillscfa.org
[2] Customer Service (England), Skills CFA (2014) www.afo.sscalliance.org

Mandatory Group A – 19 credits

Unit Reference Number	Unit Title	Level	Credit Value
A/506/2130	Deliver customer service	2	5
F/506/2131	Understand customers	2	2
J/506/2132	Principles of customer service	2	4
A/506/1964	Understand employer organisations	2	4
L/506/1788	Manage personal performance and development	2	4

Optional Group B – minimum 3 credits

Unit Reference Number	Unit Title	Level	Credit Value
D/506/2119	Communicate verbally with customers	2	3
T/506/2126	Communicate with customers in writing	2	3

Optional Group C – minimum 16 credits

Unit Reference Number	Unit Title	Level	Credit Value
H/506/2154	Deal with incoming telephone calls from customers	2	3
k/506/2155	Make telephone calls to customers	2	3
L/506/2133	Promote additional products and/or services to customers	2	2
R/506/2134	Process information about customers	2	3
Y/506/2135	Exceed customer expectations	2	3
T/506/2143	Deliver customer service whilst working on customers' premises	2	4
T/506/2157	Carry out customer service handovers	2	3

A/506/2158	Resolve customer service problems	2	5
F/506/2159	Deliver customer service to challenging customers	2	3
Y/506/2149	Develop customer relationships	2	3
T/506/2160	Support customer service improvements	2	3
A/506/2161	Support customers through real-time online customer service	2	3
J/506/2163	Use social media to deliver customer service	2	3
R/506/2151	Resolve customers' complaints	3	4
D/506/2170	Gather, analyse and interpret customer feedback	3	5
H/506/2977	Support customers using self-service equipment	2	3
K/506/2978	Provide post-transaction customer service	2	5

Optional Group D – maximum 7 credits			
Unit Reference Number	Unit Title	Level	Credit Value
T/505/4673	Health and safety procedures in the workplace	2	2
L/506/1807	Manage diary systems	2	2
H/506/1814	Provide reception services	2	3
L/506/1869	Contribute to the organisation of an event	2	3
M/506/1895	Buddy a colleague to develop their skills	2	3
L/506/1905	Employee rights and responsibilities	2	2
R/506/1789	Develop working relationships with colleagues	2	3

J/506/1806	Principles of equality and diversity in the workplace	2	2
M/502/8587	Processing sales orders	2	2
R/502/8601	Meeting customers' after sales needs	2	3
M/502/8606	Handling objections and closing sales	2	3
K/503/0421	Deal with incidents through a contact centre	2	7
L/503/0394	Carry out direct sales activities in a contact centre	2	5
H/506/1912	Negotiate in a business environment	3	4
F/502/4396	Bespoke software	2	3

2.4   Total Qualification Time (TQT)

Total Qualification Time comprises of the following two elements.[3]

(a)   The number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and

(b)   An estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike Guided Learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Please note these are estimated hours. It is the responsibility of centres to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible, therefore, that the number of guided learning hours will vary from one centre to another according to learners' needs.

Guided learning hours consist of all occasions when a member of training centre staff is present to give specific guidance towards the learning aim of the programme. This definition includes lectures, tutorials, supervised study and assignments. It does not include hours where supervision or assistance is of a general nature and is not specific to learners' study.

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

Qualification Title	TQT	GLH
SFJ Awards Level 2 Diploma in Customer Service	450	245

2.5   Age Restriction

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

2.6   Opportunities for Progression

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

- 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.

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[3] Total Qualification Time criteria, Ofqual September 2015
https://www.gov.uk/government/publications/total-qualification-time-criteria

2.7   Exemption

No exemptions have been identified.

2.8   Credit Transfer

Credits from identical units that have already been achieved by the learner may be transferred.

3   Centre Requirements

Centres offering these qualifications must have approval from SFJ Awards.

The assessment centre must:

- ensure that there are sufficient people trained or qualified to assess the number of learners they anticipate to register and qualify
- provide quality assured training for those people identified as being responsible for assessing learners
- have quality assurance systems and Internal Quality Assurers in place to ensure that all assessments are valid, reliable, authentic and sufficient
- provide quality assured assessment that meets the requirements of SFJ Awards for those people identified as being responsible for internal quality assurance
- ensure that there is a system of standardisation in place to ensure that all assessments are consistent and fair
- ensure that those undertaking the roles of quality assurance and assessment maintain their skills, knowledge and competence
- comply with the requirements of SFJ Awards and the qualifications Regulators.

Centres offering these qualifications must provide internal quality assurance to ensure assessment meets all SFJ Awards requirements and is standardised across individual assessors, assessment locations and learners.

4   Assessment

This qualification must be assessed in line with SFJ Awards' requirements and Skills CFA's Assessment Strategy (Business Administration, Customer Service and Management and Leadership)[4], Contact Centres Operations[5] or Sales[6] as appropriate to the unit. The relevant Skills CFA's assessment requirements which are applicable to the competence units are incorporated into this handbook.

Units which have been imported by Skills CFA into their competence-based qualifications will be assessed in compliance with their relevant assessment strategies; this means that F/502/4396 Bespoke Software should be assessed according to e-skills IT User Assessment Strategy available from www.e-skills.com.

4.1   SFJ Awards Requirements for Assessors

All assessors must:

1. be occupationally competent. This means that each assessor must, according to current sector practice, be competent in the functions covered by the units they are assessing. They will have gained their occupational competence working within the Justice and Community Safety sector or within a customer service environment. They are not required to occupy a position in the organisation more senior than that of the Learner they are assessing. However, Centres must be alert to the risks that all such arrangements could present and ensure that sufficient quality controls are in place through the internal quality assurance process to minimise the possibility of collusion between learners and assessors

2. 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

3. be familiar with the qualification units; and must be able to interpret and make judgements on current working practices and technologies within the area of work

4. maintain their occupational competence by actively engaging in continuous professional development activities in order to keep up-to-date with developments relating to the changes taking place in customer service and how these may impact on customer service roles in the Justice sector. These activities may include those offered by the Awarding Organisation, Skills CFA or other relevant providers in the sector

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[4] Skills CFA Assessment Strategy Competence Units (S/NVQ): Business Administration, Customer Service, Management and Leadership V10 March 2015
[5] Skills CFA Contact Centres Operations Assessment Strategy, 2011
[6] Skills CFA Sales Assessment Strategy 2010, updated January 2013

5. Assessors must be appropriately qualified or be able to prove equivalent competence as specified in relevant Skills CFA Assessment Strategy

6. Approved Centres will be required to provide SFJ Awards with current evidence of how each assessor meets these requirements; for example certificates of achievement, testimonials, references or any other relevant records.

4.2 SFJ Awards Internal Quality Assurance

All Internal Quality Assurers must:

1. be occupationally knowledgeable across the range of units for which they are responsible prior to commencing the role. Due to the risk-critical nature of the work and the legal implications of the assessment process, they must understand the nature and context of the assessors' work and that of their learners. This means that they must have worked closely with staff that 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. Those conducting internal quality assurance must also sample the assessment process and resolve differences and conflicts on assessment decisions

2. understand the content, structure and assessment requirements for the qualification they are quality assuring

3. maintain their occupational competence by actively engaging in continuous professional development activities in order to keep up-to-date with developments relating to the changes taking place in customer service and how these may impact on customer service roles in the Justice sector. These activities may include those offered by the SFJ Awards, Skills for Justice or other relevant providers in the sector

4. be appropriately qualified or be able to prove equivalent competence as specified in the Skills CFA Assessment Strategy relevant to the unit(s) they are internally quality assuring

5. 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, visit and observe assessment practice, and carry out all the other important roles of internal quality assurance

6. have an appropriate induction to Customer Service qualifications that they are quality assuring, provided to them by the Centre, and have access to ongoing training and updates on current issues relevant to these qualifications. Information on the induction and continuing professional development of carrying out internal quality assurance must be made available to the Awarding Organisation through its external quality assurance process

4.3 SFJ Awards External Quality Assurance

The monitoring and standardisation of assessment decisions will be achieved by robust and strong Centre monitoring and quality assurance according to SFJ Awards and Skills CFA requirements.

The mechanisms required to achieve these requirements are outlined in Ofqual's 'Regulatory arrangements for the Qualifications and Credit Framework'. In addition to the Regulator's requirements, SFJ Awards will evaluate all external quality assurance reports and other data relating to the Centre and any risks relating to quality control will be identified and addressed.

External Quality Assurers (EQA) will be appointed by SFJ Awards to approve centres and to monitor the assessment and internal quality assurance carried out by centres. External quality assurance is carried out to ensure that there is validity, reliability and good practice in centres.

To carry out their quality assurance role, quality assurance staff must have appropriate occupational and verifying knowledge and expertise as detailed in the following sections relating to Skills CFA's Assessment Strategy for Business Administration, Customer Service and Management and Leadership; Skills CFA's Contact Centre Operations Assessment Strategy and Skills CFA's Sales Assessment Strategy as appropriate to the relevant unit. SFJ Awards quality assurance staff will attend training and development designed to keep them up-to-date, to facilitate standardisation between staff and share good practice.

4.4 Skills CFA Requirements for Assessors, Internal Quality Assurers (IQAs) and External Quality Assurers (EQAs) of Business Administration, Customer Service and Management and Leadership[7]

Assessors

To be able to assess learners, assessors must:

- be "occupationally competent". Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed;

  AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

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[7] Skills CFA Assessment Strategy Competence Units (S/NVQ): Business Administration, Customer Service, Management and Leadership V10 March 2015

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period; **AND** have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

Internal Quality Assurers

IQAs must:

- be "occupationally competent". IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business;

  AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

  OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA and should be supported by a qualified IQA throughout their training period; **AND** demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process;

Skills CFA and SFJ Awards require all assessors, moderators and verifiers to maintain current Customer Service competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

External Quality Assurers

EQAs must:

- be "occupationally competent". EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business;

AND ONE OF EITHER OF THE FOLLOWING

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

    OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA and should be supported by a qualified EQA throughout their training period; **AND** demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

Employer Direct Model

The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of SFJ Awards, may choose between:

- Achieving the appropriate regulatory body approved unit qualifications for assessment;

    OR

- Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by SFJ Awards as providing the equivalent level of rigour and robustness as achievement of the unit qualification

In order to use the employer direct model:

- An organisation must:
    - have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

    OR

    - seek guidance and approval from SFJ Awards to demonstrate that they have:
        - appropriate processes in place to facilitate assessment, moderation or verification functions
        - carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

- SFJ Awards will:
  - offer this model to employers only
  - supply information on the requirements for internal and external moderation/verification activities to assessment centres.

4.5   Skills CFA Requirements for Assessors, Internal Verifiers and External Verifiers/External Quality Assurers of Contact Centre Operations Units[8]

Assessment of the units in the Contact Centre NVQs must be undertaken in a real working environment i.e. assessment of learner performance at work.

Learners work achievements must be assessed, moderated or verified at work by:

a.   Assessors, moderators or verifiers who have achieved, or are working towards achievement of, the appropriate regulatory body approved qualifications for assessment, moderation or verification. Those who are working towards achievement of, the appropriate regulatory body approved qualifications for assessment, moderation or verification should have their decisions countersigned by an individual that is already qualified in that particular role

OR

b.   A trainer, supervisor or manager, elected by an employer, who must either:

1.   Have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

2.   Seek guidance and approval from SFJ Awards to demonstrate that the;

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions;
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the National Occupational Standards upon which the qualifications above are based. This is known as the employer direct model.

Assessors must be occupationally competent to make Contact Centre Operations assessment judgements about the level and scope of individual learner performance at work; and occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Contact Centre Operations moderation and verification judgements about the quality of assessment and the assessment process.

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[8] Skills CFA Contact Centres Operations Assessment Strategy, 2011

Skills CFA and SFJ Awards require all assessors, moderators and verifiers to have a sound knowledge and understanding of Contact Centre competence to deliver these functions. Skills CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Contact Centre Operations assessment centres.

4.6 Skills CFA Requirements for Assessors, Internal Verifiers and External Verifiers/External Quality Assurers of Sales Units[9]

Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either learner performance at work or through simulation, as necessary. Skills CFA's Realistic Working Environment Guidelines are included in Appendix A.

If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). RWEs must provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed.

Learners must be assessed, moderated or verified at work either by:

a.   Assessors, moderators or verifiers who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

b.   A trainer, supervisor or manager, employed by an organisation, who must either:

1.   Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

2.   Seek guidance and approval from SFJ Awards to demonstrate that the;

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units.

Assessors must be occupationally competent to make Sales assessment judgements about the level and scope of individual learner performance at work or in RWEs; and,

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[9] Skills CFA Sales Assessment Strategy 2010, updated January 2013

occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. Skills CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

4.7   The Expert Witnesses

When using Expert Witnesses as a source of evidence, Expert Witnesses must:

1.   be occupationally competent. This means that each Expert Witness must, according to current sector practice, be competent in the functions covered by the units to which they are contributing. They will have gained their occupational competence working within the Customer Service sector
2.   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
3.   be familiar with the qualification unit; and must be able to interpret current working practices and technologies within the area of work.

4.8   Workplace Assessment

SFJ Awards believes that direct observation by a competent assessor (as outlined above) or testimony from an Expert Witness or Manager, is always preferable.

Expert Witness testimony has parity with assessor observation unless otherwise stated in unit evidence requirements. The assessor is responsible for making the final judgement in terms of the Learner meeting the evidence requirements for the unit.

SFJ Awards recognise that there are alternative evidence sources which may be used where direct observation is not possible or practical, e.g. work products, records, reflective accounts, professional discussion etc.

In order to ensure that the evidence used to assess Learners is valid, all Centres must demonstrate that Learners have access to the types of resources commonly in use in the sector and that the pressures and constraints of the workplace are reflected.

Where units are subject to the Skills CFA Assessment Strategy, evidence of occupational competence of all competence units at any level should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the competence units.

These conditions would be those typical to the learner's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all learners. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the learner usually works.

4.9   Use of Simulated Activities

Assessment of the units to which the Skills CFA Assessment Strategy applies must be carried out in a real job and simulation is not allowed with the exception of the Sales units. The Skills CFA Sales Assessment Strategy allows for the use of simulation for sales units.

Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Simulation should only form a small part of the evidence for the qualification and be used solely in exceptional circumstances where situations are not naturally or readily occurring. Skills CFA's Realistic Working Environment Guidelines and the units with which they can be used are included in Appendix A.

SFJ Awards requires that assessment in a simulated environment should only be used in the following circumstances:

1.   where evidence in the workplace will not be demonstrated within an acceptable time frame
2.   where the nature of the work activity presents high risk or danger to the learner and others, for example, personal safety.

Simulations must be agreed between SFJ Awards and the Centre contact from the Assessment Centre prior to use.

All simulations should follow these basic principles:

1.   a Centre's overall strategy for simulation must be agreed and approved by SFJ Awards

2.   the nature of the contingency and the physical environment for the simulation must be realistic and learners should be given no indication as to exactly what contingencies they may come across

3.   where simulations are used they must reflect the requirements of the qualification units

4.   the location and environment of simulation must be agreed between SFJ Awards and the Centre contact prior to it taking place

5.   all 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

6.   There should be a range of simulations to cover the same aspect of a unit so that the risk of learners successfully colluding is reduced.

4.10 Use of Languages

SFJ Awards conducts its business activities in English and the qualification handbook for this qualification is provided in English. The SFJ Awards policy on the use of languages (Welsh and Irish) is available on the website.

SFJ Awards will provide assessment materials and qualification handbooks expressed in English. If there is sufficient demand; in Wales materials will be provided in English and Welsh or Welsh. In Northern Ireland assessment materials will be provided in English and Irish.

For vocational qualifications SFJ Awards will support the assessment of Learners in Irish or Welsh provided that sufficient notice is given to ensure that an assessment in a language other than English is comparable.

SFJ Awards carries out its business activities in English and may employ the services of a translator for quality assurance purposes.

Reasonable adjustments may be made by carrying out the assessment in British or Irish Sign Language.

The qualification handbook for this qualification is currently available in English.

5 Qualification Units

Mandatory Group A

URN:	A/506/2130
Title:	Deliver customer service
Level:	2
Credit value:	5
GLH:	27

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	F/506/2131
Title:	Understand customers
Level:	2
Credit value:	2
GLH:	17

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A

URN:	J/506/2132
Title:	Principles of customer service
Level:	2
Credit value:	4
GLH:	34

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand customer service	1.1 Explain the purpose and scope 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 the importance of keeping up to date with knowledge of competitors' activities 1.6 Explain barriers to providing effective customer service 1.7 Describe the features of effective follow-up service
2. Understand how legal and ethical requirements relate to customer service	2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service 2.2 Describe how health, safety and environmental legislation affects customer service delivery 2.3 Explain how ethical considerations affect customer service 2.4 Explain how equality legislation affects customer service 2.5 Describe how legislation affects the use and storage of customer information

3. Understand how to deliver effective customer service	3.1	Explain the difference between customers' wants, needs and their expectations
	3.2	Explain how to identify customers' needs and expectations
	3.3	Explain the importance of managing customers' expectations
	3.4	Explain how to behave in a way that meets customers' expectations
	3.5	Describe techniques that can be used to put customers at ease and gain their trust
	3.6	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	Explain the uses of systems to manage customer service information
	4.4	Identify the features of an effective customer complaints process
	4.5	Describe the uses of a customer complaints process
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A	

URN:	A/506/1964
Title:	Understand employer organisations
Level:	2
Credit value:	4
GLH:	40

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand organisational structures	1.1 Explain the differences between the private sector, public sector and voluntary sector 1.2 Explain the functions of different organisational structures 1.3 Describe the features of different types of legal structures for organisations
2. Understand the organisational environment	2.1 Describe the internal and external influences on organisations 2.2 Explain the use of different models of analysis in understanding the organisational environment 2.3 Explain why change in the business environment is important
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	L/506/1788
Title:	Manage personal performance and development
Level:	2
Credit value:	4
GLH:	18

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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)
	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 objectives that align with organisational and personal needs
4. Be able to fulfil a personal development plan	4.1	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
	4.2	Make use of formal development opportunities that are consistent with business needs
	4.3	Use informal learning opportunities that contribute 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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy	

Optional Group B

URN:	D/506/2119
Title:	Communicate verbally with customers
Level:	2
Credit value:	3
GLH:	14

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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 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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	T/506/2126
Title:	Communicate with customers in writing
Level:	2
Credit value:	3
GLH:	20

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

Optional Group C

URN:	H/506/2154
Title:	Deal with incoming telephone calls from customers
Level:	2
Credit value:	3
GLH:	16

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	K/506/2155
Title:	Make telephone calls to customers
Level:	2
Credit value:	3
GLH:	16

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
		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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy	

URN:	L/506/2133
Title:	Promote additional products and/or services to customers
Level:	2
Credit value:	2
GLH:	14

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	R/506/2134
Title:	Process information about customers
Level:	2
Credit value:	3
GLH:	14

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	Y/506/2135
Title:	Exceed customer expectations
Level:	2
Credit value:	3
GLH:	15

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	T/506/2143
Title:	Deliver customer service whilst working on customers' premises
Level:	2
Credit value:	4
GLH:	20

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	T/506/2157
Title:	Carry out customer service handovers
Level:	2
Credit value:	3
GLH:	15

Learning outcomes	Assessment criteria
The learner will:	*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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	A/506/2158	
Title:	Resolve customer service problems	
Level:	2	
Credit value:	5	
GLH:	22	

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	F/506/2159
Title:	Deliver customer service to challenging customers
Level:	2
Credit value:	3
GLH:	16

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	Y/506/2149
Title:	Develop customer relationships
Level:	2
Credit value:	3
GLH:	18

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	T/506/2160
Title:	Support customer service improvements
Level:	2
Credit value:	3
GLH:	12

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	A/506/2161
Title:	Support customers through real-time online customer service
Level:	2
Credit value:	3
GLH:	15

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	J/506/2163
Title:	Use social media to deliver customer service
Level:	2
Credit value:	3
GLH:	18

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	R/506/2151
Title:	Resolve customers' complaints
Level:	3
Credit value:	4
GLH:	22

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery 1.3 Explain negotiating techniques used to resolve customers' complaints 1.4 Explain conflict management techniques used in dealing with upset customers 1.5 Explain organisational procedures for dealing with customer complaints 1.6 Explain when to escalate customers' complaints 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services
2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints 2.2 Take personal responsibility for dealing with complaints 2.3 Communicate in a way that recognises customers' problems and understands their points of view 2.4 Explain the advantages and limitations of different complaint response options to customers 2.5 Explain the advantages and limitations of different complaint response options to the organisation 2.6 Keep customers informed of progress 2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority 2.8 Record the outcome of the handling of

	complaints for future reference
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	D/506/2170
Title:	Gather, analyse and interpret customer feedback
Level:	3
Credit value:	5
GLH:	24

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand how to gather, analyse and interpret customer feedback	1.1 Describe methods of collecting data for customer research 1.2 Explain random sampling techniques used to collect data 1.3 Explain how to evaluate bias in non-random samples 1.4 Explain the principles of questionnaire design 1.5 Assess the suitability of a range of techniques to analyse customer feedback 1.6 Explain techniques used to monitor the quality of data collected 1.7 Explain the use of software to record and analyse customer feedback 1.8 Explain the validation issues associated with customer feedback 1.9 Explain the importance of anonymising comments from customers who do not wish to be identified
2. Be able to plan the collection of customer feedback on customer service issues	2.1 Identify the objectives of collecting customer feedback 2.2 Justify the reasons for selecting different data collection methods 2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
3. Be able to gather customer feedback	3.1 Collect customer feedback using the sampling frame identified in a customer service plan 3.2 Record data in a way that makes analysis straightforward 3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures

4. Be able to analyse and interpret customer feedback to recommend improvements	4.1 Use data analysis methods to identify patterns and trends in customer feedback
	4.2 Use the findings of a data analysis to identify areas for improvement to customer service
	4.3 Present the findings of an analysis in the agreed format
	4.4 Recommend improvements in response to the findings of an analysis
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	H/506/2977
Title:	Support customers using self-service equipment
Level:	2
Credit value:	3
GLH:	18

Learning outcomes *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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	K/506/2978
Title:	Provide post-transaction customer service
Level:	2
Credit value:	5
GLH:	22

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

Optional Group D

URN:	T/505/4673
Title:	Health and Safety Procedures in the Workplace
Level:	2
Credit value:	2
GLH:	16

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Know health and safety procedures in the workplace	1.1 Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees 1.2 Describe two health and safety laws affecting the workplace 1.3 Define the importance of following health and safety procedures in the workplace 1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace
2. Be able to carry out tasks with regard to health and safety in the workplace	2.1 Carry out a risk assessment of a specified workplace activity 2.2 Use equipment or tools safely in the workplace 2.3 Describe how to prevent accidents in the workplace 2.4 Assess how own health and safety practices could be improved
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A

URN:	L/506/1807
Title:	Manage diary systems
Level:	2
Credit value:	2
GLH:	12

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand the management of diary systems	1.1 Explain the importance of keeping diary systems up to date 1.2 Describe the basis on which bookings and changes are prioritised 1.3 Explain any constraints relating to making bookings for people or facilities 1.4 Describe the types of problems that can occur when managing diaries
2. Be able to manage diary systems	2.1 Obtain the information needed to make diary entries 2.2 Make accurate and timely diary entries 2.3 Respond to changes in a way that balances and meets the needs of those involved 2.4 Communicate up-to-date information to everyone involved 2.5 Keep diaries up-to-date 2.6 Maintain the requirements of confidentiality
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	H/506/1814
Title:	Provide reception services
Level:	2
Credit value:	3
GLH:	15

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Understand reception services	1.1 Explain the receptionist's role in representing an organisation 1.2 Explain an organisation's structure and lines of communication 1.3 Describe an organisation's standards of presentation 1.4 Explain the health, safety and security implications of visitors to a building 1.5 Explain how to deal with challenging people
2. Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards 2.2 Direct visitors to the person they are visiting in accordance with organisational standards 2.3 Record visitors' arrivals and departures in accordance with organisational procedures 2.4 Provide advice and accurate information within organisational guidelines on confidentiality 2.5 Keep the reception area tidy and materials up-to-date 2.6 Answer and deal with telephone calls within organisational standards 2.7 Adhere to organisational procedures on entry, security, health and safety
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	L/506/1869
Title:	Contribute to the organisation of an event
Level:	2
Credit value:	3
GLH:	23

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event 1.2 Explain the purpose and features of different types of events 1.3 Describe the type of resources needed for different types of events 1.4 Describe the different needs attendees may have and how to meet these 1.5 Explain the requirements of health, safety and security when organising events 1.6 Describe the types of problems that may occur during events and how to deal with them
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event 2.2 Obtain resources within the agreed timescales 2.3 Distribute pre-event documentation to delegates in accordance with the event plan 2.4 Co-ordinate attendee responses within the agreed timescale 2.5 Identify any special requirements of event attendees
3. Be able to set up an event	3.1 Set up layout and resources in accordance with the event plan 3.2 Confirm that all identified resources are in place and meet requirements 3.3 Behave in a way that maintains organisational values and standards
4. Be able to carry out post-event actions	4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract 4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	M/506/1895
Title:	Buddy a colleague to develop their skills
Level:	2
Credit value:	3
GLH:	19

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Understand how to buddy a colleague	1.1 Describe what is expected of a buddy 1.2 Explain techniques to give positive feedback and constructive criticism 1.3 Explain techniques to establish rapport with a buddy
2. Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3 Agree a schedule of meetings that minimise disruption to business 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3. Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities 3.2 Provide examples of how to carry out tasks correctly 3.3 Identify instances of good practice and areas for improvement through observation 3.4 Praise a buddy colleague on well completed tasks 3.5 Give constructive feedback on ways in which a buddy could improve performance 3.6 Offer a buddy hints and tips based on personal experience
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	L/506/1905	
Title:	Employee rights and responsibilities	
Level:	2	
Credit value:	2	
GLH:	16	

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry 1.2 Describe career pathways within their organisation and industry 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway 1.4 Describe an organisation's principles of conduct and codes of practice 1.5 Explain issues of public concern that affect an organisation and industry 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour 2.3 Describe the procedures and documentation that protect relationships with employees 2.4 Identify sources of information and advice on employment rights and responsibilities
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A

URN:	R/506/1789
Title:	Develop working relationships with colleagues
Level:	2
Credit value:	3
GLH:	19

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand the principles of effective team working	1.1 Outline the benefits of effective team working 1.2 Describe how to give feedback constructively 1.3 Explain conflict management techniques that may be used to resolve team conflicts 1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5 Explain the importance of warning colleagues of problems and changes that may affect them
2. Be able to maintain effective working relationships with colleagues	2.1 Recognise the contribution of colleagues to the achievement of team objectives 2.2 Treat colleagues with respect, fairness and courtesy 2.3 Fulfil agreements made with colleagues 2.4 Provide support and constructive feedback to colleagues
3. Be able to collaborate with colleagues to resolve problems	3.1 Take others' viewpoints into account when making decisions 3.2 Take ownership of problems within own level of authority 3.3 Take action to minimise disruption to business activities within their own level of authority 3.4 Resolve problems within their own level of authority and agreed contribution
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	J/506/1806
Title:	Principles of equality and diversity in the workplace
Level:	2
Credit value:	2
GLH:	10

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand the implications of equality legislation	1.1 Define the concept 'equality and diversity' 1.2 Describe the legal requirements for equality of opportunity 1.3 Describe the role and powers of organisations responsible for equality 1.4 Explain the benefits of equal opportunities and diversity 1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace 2.2 Describe their own responsibilities for equality and diversity in the workplace 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A

URN:	M/502/8587
Title:	Processing sales orders
Level:	2
Credit value:	2
GLH:	17

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing 1.2 Describe organisational processes for ordering products and/or services 1.3 Describe different sources of information used to check customer credit 1.4 Describe the different payment methods accepted by sales orientated organisations 1.5 Explain the role of the despatch function 1.6 Describe service standards relating to sales order completion 1.7 Explain the importance of storing information securely
2. Be able to process sales orders	2.1 Identify customer sales order requirements 2.2 Check that the credit status of the customer meets organisational standards 2.3 Confirm the availability of products and/or services to the customer 2.4 Ensure that information given to the customer about delivery, timing and price is accurate 2.5 Ensure that the sale is authorised following the organisation's procedures 2.6 Finalise the transaction in accordance with organisational procedures 2.7 Ensure that the customer is aware of the terms and conditions of sale 2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders 2.9 Identify who to go to when in need of support with sales order processing problems

3. Be able to follow up sales order processing	3.1 Keep the customer informed of the sales order progress and any problems with the sale order
	3.2 Advise the customer of current discounts and special offers
	3.3 Check all information is stored securely
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CFA Sales Assessment Strategy.

URN:	R/502/8601
Title:	Meeting customers' after sales needs
Level:	2
Credit value:	3
GLH:	14

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Be able to investigate customer after sales needs	1.1 Establish the nature of customers' after sales needs 1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times
2. Be able to handle customers' after sales needs	2.1 Deal with customers' after sales needs following organisational customer service standards and procedures 2.2 Balance customers' needs with those of the organisation 2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority 2.4 Fulfil commitments made to customers in accordance with quality and customer service standards 2.5 Record commitments made to customers
3. Be able to review the after sales process	3.1 Obtain customers' comments on service reliability from customers 3.2 Analyse and report the findings to the relevant person in the organisation 3.3 Make recommendations for improvements to after sales service provision in the light of customer feedback
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CFA Sales Assessment Strategy.

URN:	M/502/8606
Title:	Handling objections and closing sales
Level:	2
Credit value:	3
GLH:	22

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand how to handle sales objections	1.1 Explain the difference between standard and non-standard sales objections 1.2 Explain how to clarify objections and identify potential sales opportunities from them 1.3 Describe how to use questioning techniques to explore and resolve customer issues 1.4 Explain how to empathise with and reassure the customer 1.5 Explain the difference between hypothetical and real objections 1.6 Explain how knowledge of products and services can be used to answer objections 1.7 Explain how competitor activity may affect the potential sale 1.8 Describe how industry/sector pricing structures may have an impact on sales objections 1.9 Explain the scope of authority and responsibility when dealing with objections 1.10 State who to go to when in need of support to overcome objections
2. Understand how to close the sale	2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale 2.2 Explain how to perform a trial close 2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale 2.4 Explain potential barriers to closing the sale 2.5 Explain a range of ways to close the sale

3. Be able to handle objections	3.1 Clarify the nature and extent of objections
	3.2 Explain to the customer the concessions available within the scope of authority
	3.3 Follow organisational procedures for dealing with objections
	3.4 Promote the benefits of products and/or services to overcome objections
	3.5 Use testimonials to overcome objections
	3.6 Refer to those in authority when dealing with objections outside the scope of own authority
4. Be able to close the sale	4.1 Perform a trial close and ask for the order when objections have been met
	4.2 Make use of add-on, up-selling or cross-selling opportunities
	4.3 Follow organisational procedures for accepting confirmation of an order
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CFA Sales Assessment Strategy.

URN:	K/503/0421
Title:	Deal with incidents through a contact centre
Level:	2
Credit value:	7
GLH:	40

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
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

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
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CFA Contact Centre Assessment Strategy.

URN:	L/503/0394
Title:	Carry out direct sales activities in a contact centre
Level:	2
Credit value:	5
GLH:	15

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services
2. Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures
3. Be able to keep direct sales records within a contact centre	3.1 Identify the information about customers, products and/or services that should be recorded during the sales process 3.2 Record customer, product and/or service information in accordance with organisational procedures
4. Be able to comply with regulations and legislation during direct sales in a contact centre	4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre 4.2 Ensure compliance with regulations during direct selling through a contact centre

5. Understand how to conduct sales activities in a contact centre	5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre
	5.2 Describe the organisational policies and procedures for direct sales through a contact centre
	5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
	5.4 Describe the common objections and questions raised by customers during direct selling
	5.5 Explain how to identify cross-selling and up-selling opportunities
	5.6 Describe different methods of researching potential new customers
	5.7 Explain how to retrieve information from organisational sales records
	5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CFA Contact Centre Assessment Strategy.

URN:	H/506/1912
Title:	Negotiate in a business environment
Level:	3
Credit value:	4
GLH:	18

Learning outcomes	Assessment criteria
The learner will:	*The learner can:*
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party 2.6 Research the strengths and weaknesses of the other party
3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances 3.3 Maintain accurate records of negotiations, outcomes and agreements made 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy

URN:	F/502/4396
Title:	Bespoke Software
Level:	2
Credit value:	3
GLH:	20

Learning outcomes *The learner will:*	Assessment criteria *The learner can:*
1. Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3 Respond appropriately to data entry error messages
2. Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively 2.2 Select and use appropriate structures and/or layouts to organise information 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
3. Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Select and use appropriate methods to present information
Assessment requirements or guidance specified by a sector or regulatory body	See IT User Assessment Strategy available from www.e-skills.com

Appendix A:
Skills CFA Realistic Working Environment Guidelines

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment. These guidelines apply only to the following units in this qualification:

- M/502/8587 Processing sales orders
- M/502/8606 Handling objections and closing sales
- R/502/8601 Meeting customers' after sales needs

To undertake the assessment in a RWE the following guidelines must be met:

1. The RWE is managed as a real work situation

2. Assessment must be carried out under realistic business pressures

3. All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations

4. Candidates must be expected to achieve a volume of work comparable to normal business practices

5. The range of services, products, tools, materials and equipment that the candidates use must be up to date and available

6. Account must be taken of any legislation or regulations in relation to the type of work that is being carried out

7. Candidates must be given workplace responsibilities to enable them to meet the requirements of the units

8. Customer perceptions of the RWE is similar to that found in the work situation being represented

9. Candidates must show that their productivity reflects those found in the work situation being represented.