

Level 2 Certificate in Customer Service (4417-02)



Qualification handbook for centres

QCA Ref 500/6329/7

www.cityandguilds.com
July 2009
Version 1.0

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City & Guilds
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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

Qualification title and level	Level 2 Certificate in Customer Service
City & Guilds qualification number	4417-02
Ofqual accreditation number	500/6329/7
Last registration date	31/12/2010
Last certification date	31/12/2012

1.1 Qualification structure

This qualification aims to develop knowledge and understanding of the principles of effective customer service and develop the practical skills required to support the customer service environment.

To achieve the Level 2 Certificate in Customer Service, learners must achieve 13 credits from the two mandatory units.

The diagram below illustrates the unit titles, the credit value of each unit and the title of the qualification which will be awarded to candidates successfully completing the required combination of units and/or credits. It also shows any excluded combination of units.

Accreditation unit reference	City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	Credit value	Excluded combination of units (if any)
J/600/1003	Unit 201	Delivery of Effective Customer Service	Mandatory	6	N/A
J/600/0658	Unit 202	Supporting the Customer Service Environment	Mandatory	7	N/A

1.2 Opportunities for progression

Candidates can progress onto the Level 3 Certificate in Customer Service and/or Level 2 or 3 NVQ/SVQs in Customer Service.

Candidates may progress onto the NVQs in other work-related areas (for example Retail, Administration, Contact Centres, IT and other technical sectors).

Candidates could progress into employment in any industry in a customer service role.

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Sample test papers	www.cityandguilds.com
Marking guide	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer this qualification including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the Level 2 Certification in Customer Service 4410-02 qualification will qualify for automatic approval for the new Level 2 Certificate in Customer Service 4417-02.

2.1 Resource requirements

Human resources

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally knowledgeable in the area of customer service for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

While the Assessor/Verifier (A/V) units are valued as qualifications for centre staff, they are not currently a requirement for this qualification.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

There are no age limits attached to candidates undertaking this qualification unless it is a legal requirement of the process or the environment.

3 Units

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- Title
- Level
- Credit value
- Unit aim
- Relationship to NOS, other qualifications and frameworks
- Endorsement by a sector or other appropriate body
- Information on assessment
- Learning outcomes which are comprised of a number of assessment criteria
- Notes for guidance

Summary of units

City & Guilds unit number	Title	QCF unit number	Credits
201	Delivery of effective customer service	J/600/1003	6
202	Supporting the customer service environment	J/600/0658	7

Level: 2

Credit value: 6

Unit aim

To enable the candidate to develop an appropriate knowledge and understanding of the principles of effective customer service.

Learning outcomes

There are **five** learning outcomes to this unit. The learner will be able to:

1. Describe the principles of customer service
2. Understand how customer needs and expectations are formed
3. Understand principles of responding to customers' problems or complaints
4. Identify the interpersonal and team working skills required in the customer service environment
5. Identify the legislation which supports the customer service process

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 2 – 1, 5, 6, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 21, 22, 23, 31, 36, 37, 38.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 1 – C1.1, C1.2, C1.3; Level 2 – C2.1a and 1b, C2.2
- AON Level 1 - N1.1
- ICT Level 1 – ICT1.1, ICT1.2

Assessment and grading

This unit will be assessed by:

- a GOLA online multiple choice test

Unit 201

Outcome 1

Delivery of Effective Customer Service

Describe the principles of customer service

Assessment Criteria

The learner can:

- 1.1.1. Identify the purpose of customer service
- 1.1.2. Describe how customer service affects the success of the organisation
- 1.1.3. Describe different types of customers of an organisation
- 1.1.4. Identify the range of customer needs
- 1.1.5. Identify the customer service information which may be retained.
- 1.1.6. Identify the difference between providing a product and providing a service
- 1.1.7. Describe what is meant by an after-sales service
- 1.1.8. Describe what is meant by a Unique Selling Point (USP) and a Unique Service Offer (USO)
- 1.1.9. Identify the methods a customer service deliverer can use to keep product and service knowledge up-to-date
- 1.1.10. Describe how an organisation can promote its products and/or services

Notes for Guidance

1.1.1

Good customer service is about

- ensuring customer needs are met
- encouraging customer loyalty
- forming a relationship with customers
- ensuring customers leave happy and return
- ensuring customers pass on positive feedback to others.

1.1.2

Having experienced a certain level of customer service from an organisation, customers then come to expect that level of customer service whether good or bad.

Good customer service can give an organisation an edge over its competitors while poor service can result in a loss of business and a reputation for poor service can be difficult to change.

1.1.3

A customer can be an individual or an organisation. Customers can be internal eg from another part of the same organisation or colleagues; external eg individuals, businesses including suppliers.

1.1.4

Different customers will have different needs and expectations from an organisation eg that timescales are met, promises kept, there's value for money, quality presentation, employees are knowledgeable and friendly, products are fit for use/purpose, are reliable, easy to use.

Other types of customer needs exist where customers' health, language skills, age or cultural background or learning difficulties influence how a service provider may need to adapt their behaviour and adapt their methods of communication to meet these individual needs.

1.1.5

Customer service information/records – there is a range of customer service information/records which organisations may retain eg personal data – customer’s name, address, account details, previous purchases; customer feedback on a product or service – user evaluation; warranty/guarantee records; records of complaints.

1.1.6

Products are tangible ie a customer can buy a product like a car and own it. However, they cannot own a service. A product is produced by a manufacturing process while you subscribe to a service. The main difference between providing products as opposed to a service is that more personal contact may be required when marketing a service as compared with marketing products. Providing a product may also involve providing after-sales service as in help-line facilities following the sale of a computer.

1.1.7

An after sales service - providing support for a service or a product after purchase eg help-line facilities following the sale of a computer. With a product the after sales service may involve dealing with warranties, guarantees, exchanges, repair agreements, refunds. As such there may be various terms, legal constraints and organisational policies which need to be considered.

1.1.8

A USP - Unique Selling Point is what makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines. A unique selling point or proposition (USP) defines an organisation’s competitive advantage. An organisation must identify what makes it different from the competitors and emphasise these advantages in marketing thus influencing the customer’s choice of products and services.

A USO – Unique Service Offer is what makes a service different or better from its competitor(s) eg 24 hour availability. A USO is used to differentiate a service offer from that of competitors or comparable organisations. USOs are directly related to why customers choose to do business with organisations by using their products or services. Customers buy benefits and solutions NOT products and the candidate should be familiar with the technique of selling features and benefits and should know how these compare with those of competitors.

USPs and USOs are used to differentiate what one organisation provides by way of products and/or services from another.

1.1.9

Keeping up-to-date with product and services knowledge is vital. Various sources of information about products and/or services will be available within an organisation eg catalogues, brochures, price lists, colleagues, internet, intranet, training sessions, organisational product and/or service information/literature, word of mouth from customers.

1.1.10

Promotion methods can be leaflets, telephone calling, demonstrations, mailshots, promotional videos, newspaper (national and local) advertisements, television advertisements, local/national radio advertisements. Organisations need to promote benefits not features.

Unit 201

Outcome 2

Delivery of Effective Customer Service

Understand how customer needs and expectations are formed

Assessment Criteria

The learner can:

- 1.2.1. Describe the purpose of an organisation's service offer
- 1.2.2. Describe how customer expectations are formed
- 1.2.3. Describe the interrelationship between customer satisfaction and customer expectations
- 1.2.4. Describe how customer needs can be identified
- 1.2.5. Identify the methods of obtaining customer feedback
- 1.2.6. Describe how an organisation can maintain customer loyalty
- 1.2.7. Identify why it is important to ensure effective customer relationships are maintained
- 1.2.8. Describe why it is important for a customer to be able to identify a 'brand'

Notes for Guidance

1.2.1

Organisation's service offer - also known as a customer charter – is the organisation's statement about the level of service they will offer eg some customer charters will set out how they will compensate a customer when customer service has not been delivered in line with the charter; or it will clearly stated the timescales for responses.

The service offer sets the basis on which the organisation will provide a service to its customers. Customers will know this is what they can expect while organisations know what they must deliver.

1.2.2

Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Expectations are formed eg

- through what customers hear and see
- what they read and the messages the organisation sends (ie via its reputation and brand)
- what actually happens to them when dealing now and in the past with an organisation.

Customer expectations are also heavily influenced by word of mouth (eg friends and family) and also the media.

Customers may have experiences with similar organisations which impact upon their overall impression and expectations of that particular service industry, eg hotels and restaurants, supermarkets, banking, insurance.

1.2.3

Customer service equals the totality of what an organisation does to meet customer expectations and produce customer satisfaction. Customer expectations are what customers think should happen and how they believe they should be treated when asking for or receiving customer service. Customer satisfaction then occurs when a customer is happy with the service provided.

However, it is not sufficient for some organisations to simply achieve customer satisfaction; they want to do better and talk in terms of exceeding customer expectations, delighting the customer or surprising the customer. Customer satisfaction is still achieved but the perception is to a greater degree.

1.2.4

Customer needs can be identified through the use of well-developed inter-personal skills which enable a service deliverer to accurately identify those needs.

Customers at times do not have a clear understanding of their needs. Assisting in determining needs is a valuable service to the customer and this can be done by asking the customer relevant questions and listening carefully to what the customer's responses are.

1.2.5

Customer feedback is what the customer reports back to an organisation about the customer service experienced. It may be collected by the organisation formally using questionnaires, comment cards, competitions, focus groups or surveys (telephone or mail). This is sometimes called formal feedback.

All staff in an organisation also has a responsibility for gathering spontaneous customer feedback, eg chance remarks or comments, verbal or in writing made by customers without being asked. This is informal feedback.

1.2.6

If the service customers receive is consistently good, loyalty will be built. If there is a good background of achieving customer satisfaction, customer loyalty may exist but even when things go wrong, organisations can recover from a bad situation with an individual customer by working on repairing the damage. Repeat business is influenced by a customer's on-going perception of the service they receive.

Customer loyalty can be rewarded by making special customer service arrangements and offers for repeat customers, eg points programme; loyalty scheme; special offers.

1.2.7

Customer relationships exist where customers do repeat business over time with the same organisation and/or service provider. Good customer relationships are important to a service provider because they build customer loyalty, resulting in repeat business.

It is beneficial for an organisation to have loyal customers as it tends to be cheaper and easier to repeat business with an existing satisfied customer than it is to find a new customer.

1.2.8

Knowing the 'brand' of the product or service is an important message to transmit to customers. A brand is a promise to customers. A strong brand name tells customers; 'you know the name, you can trust the promise'. Generally there is a 'logo' and instantly customers have a visual reminder of what the company is offering and promising customers and they know what to expect. Customers can be attracted to the brand above that of the competition.

Unit 201

Outcome 3

Delivery of Effective Customer Service

Understand principles of responding to customers' problems or complaints

Assessment Criteria

The learner can:

- 1.3.1. Identify common causes of customer problems and complaints
- 1.3.2. Identify different methods of communication
- 1.3.3. Describe the importance of adapting methods of communication and behaviour to meet the individual needs of customers
- 1.3.4. Explain how the non verbal communication of the service deliverer can affect the behaviour of the customer
- 1.3.5. Describe how personal presentation, approach and attitude will influence the perception of the service delivered

Notes for Guidance

1.3.1

Customer problems and complaints can be caused through eg faulty goods, poor quality, incorrect stock, failure to return calls, failure to meet deadlines, poor attitude of staff.

1.3.2

The most effective methods of communication are eg

- face-to-face
- written communication eg letter, email
- telephone and text

Face-to-face – is about eye contact and active listening. 'Normal' eye contact may differ across cultures; 'active listening' is about head nodding, gestures and repeating back phrases that are heard and confirmation of understanding.

Written communication is eg letter, email, memos and reports. There will be guidelines on when and how to use written communication eg house styles, language to be used etc. Written communication will be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, or if they are going to be on hold, etc; speaking clearly and slowly to allow for the possibility that reception on the 'phone line may not be perfect; adapting speech to meet individual needs of customer.

1.3.3

It is important to adapt methods of communication to meet the individual needs of a range of customers for example those with:

- language difficulties
- health issues
- different age groups
- cultural differences
- learning difficulties

It is always necessary to communicate in a clear, polite and confident way eg where there are language difficulties it may require that the service deliverer talks more slowly, clearly and without the use of jargon. The service deliverer should treat the customer with respect at all times and work with the individual to meet their needs.

1.3.4

Non-verbal communication is about the use of body language eg

- Gestures
- Posture
- Facial expression
- Eye contact
- Personal presentation eg dress

It is important to be aware of the potential impact of a range of body language variations eg

- Standing very close to a customer versus standing at a distance
- Folding arms versus open arms
- Giving lots of eye contact, giving no eye contact
- Pointing fingers, frowning versus smiling

Body language can signal pleasure, anger, frustration or aggression without you realising it and can affect the behaviour of the customer who reacts to what they perceive the message to be and vice versa.

1.3.5

The customer service deliverer's own personal presentation, approach and attitude will influence the customer's perception of the service delivered. If the customer expects to see staff in uniform who make a friendly approach and have a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears not to care.

A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you don't get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances eg being under pressure through lack of time, during busy periods.

Unit 201

Outcome 4

Delivery of Effective Customer Service

Identify the interpersonal and team working skills required in the customer service environment

Assessment Criteria

The learner can:

- 1.4.1. Describe the skills required for effective team working
- 1.4.2. Describe how to maintain effective working relationships within a team
- 1.4.3. Describe the range of inter-personal skills required for effective customer service

Notes for Guidance

1.4.1

The skills required for effective team working include the ability to be:

- Supportive
- Comfortable with disagreement and the ability to successfully overcome differences in opinion
- Able to discuss and listen
- Able to learn from experience, reviewing and improving performance in the light of both successes and failures

The following phases (Bruce Tuckman) are all necessary and inevitable in order for a team to grow, to face up to challenges, to tackle problems, to find solutions, to plan work, and to deliver results and so be effective. The phases are:

- Forming
- Norming
- Storming
- Performing

1.4.2

Maintaining effective working relationships requires people to eg

- share workloads
- share information
- be able to work co-operatively with others
- show sensitivity to the needs and feelings of others
- work as a team to resolve customer problems and complaints
- apply teamwork to give good customer service
- work effectively with others to complete an allotted task
- respond positively to requests for help or support
- understand where and when to ask for help and support

There should always be awareness of the different personalities that could exist within a team eg introvert, confident, assertive, aggressive and withdrawn and the fact that there may be a requirement to adapt personal behaviour to the needs and feelings of team members. There will need to be an awareness of how an individual's behaviour can impact on team performance and that individuals in the team are working towards a common goal.

1.4.3

The range of interpersonal skills required for effective customer service includes:

- oral communication skills
- written communication skills
- non-verbal communication skills (body language)
- telephone skills
- questioning skills
- listening skills
- decision-making skills
- problem-solving skills
- information-gathering skills
- personal development skills
- team working skills

Unit 201

Outcome 5

Delivery of Effective Customer Service

Identify the legislation which supports the customer service process

Assessment Criteria

The learner can:

- 1.5.1. Identify the key aspects of the legislation relating to consumer law
- 1.5.2. Identify the main principles of equal opportunities legislation in relation to providing customer service
- 1.5.3. Identify the responsibilities of the employer and employee under the Health and Safety at Work Act
- 1.5.4. Describe why it is important to respect customer and organisation confidentiality
- 1.5.5. Identify the main principles of the Data Protection Act
- 1.5.6. Identify how a code of practice or ethical standards can impact upon the activities of a service deliverer

Notes for Guidance

1.5.1

The key aspects of the legislation relating to consumer law are:

- Sale of Goods Act – relates to goods which are sold – of merchantable (ie satisfactory) quality; as described, fit for purpose, there are likely to be organisational procedures in relation to rights to refund under Act.
- Supply of Goods and Services Act – involved with supplying goods or services to customers; eg work done, and products supplied by tradesmen and professionals, eg dentists, builders, plumbers, gardeners – ‘duty of care’.
- Unsolicited Goods and Services Act - goods or services, not ordered by customers – traders cannot charge for goods or services they have sent to customers without their being ordered.
- Trade Descriptions Act – must not falsely describe something for sale; must not make false claims for services, accommodation or facilities.
- Consumer Protection Act – customers can claim compensation for death, injury or damage to property over £275 if a product they use turns out to be faulty; producers and distributors of goods are required to ensure that their products are safe; it is an offence to display or to give a customer misleading information.
- Consumer Credit Act - protects customers when they buy or borrow on credit – gives customers a wide range of rights.
- The Consumer Protection Regulations – protection to customers who shop by ‘phone, mail order via the Internet or digital TV.

1.5.2

The equal opportunities legislation that relates to providing customer service is eg

Disability Discrimination Act – complex legislation where customer service must not be seen to discriminate against customers with disabilities; obligations of the organisation are different according to the size of the organisation and the products or services being offered. It influences customers' rights of access to goods, facilities, services and premises.

Sex Discrimination Act and Race Relations Act (as amended) aims to prevent people being discriminated against to ensure people are treated fairly and equally. Sex Discrimination Act – influences customers' rights of access to goods, facilities, services and premises.

It should be remembered that different people have different needs, expectations, opportunities and responsibilities, therefore, it is important to remember that treating people fairly means recognising their differences.

1.5.3

Health and Safety at Work Act (HASWA) covers the responsibilities of employers to their employees and also to customers who are on the premises. It also covers safe working practices, common risks and hazards eg slippery or uneven floors, excessive noise and/or moving parts in machinery, chemicals.

It also covers responsibilities relating to (a) fire drill procedures (b) evacuation procedures (c) suspicious packages (d) terrorism procedures (e) special codes to indicate the level of threat the organisation believes they are under at any moment in time eg a government department.

1.5.4

Organisations hold lots of 'personal information' about customers – eg account details, addresses and this information cannot be disclosed to anyone who asks for it. An organisation which handles personal information has a duty by law to keep its customers' personal information safe and secure, whether it is stored in a manual format or electronically.

Legislation controls the use of data and to not respect customer and organisation confidentiality could result in a loss of the customer.

Protecting confidential information is a business requirement, and in many cases also an ethical and legal requirement. Information security means protecting information and information systems from unauthorized access, use, disclosure, disruption, modification, or destruction. Any loyalty and goodwill which exists between customers and the organisation will be lost if confidentiality, is breached.

Security and confidentiality of data is covered by legislation ie Data Protection Act 1998 which has 8 principles that must be applied.

1.5.5

The 8 principles of the Data Protection Act are:

- Personal information shall be processed fairly and lawfully and, in particular, shall not be processed unless conditions are met
- Personal information be obtained only for specified and lawful purposes and shall not be further processed in a manner incompatible with those purposes.
- Personal information shall be adequate, relevant and not excessive for the purpose
- Personal information shall be accurate and, where necessary, kept up to date
- Personal information shall not be kept for longer than is necessary for the purpose
- Personal information should be processed in accordance with the rights of data subjects

These rights are:

- Access to personal information
- Prevent processing likely to cause damage or distress
- Prevent processing for direct marketing
- Automated decision making
- Compensation
- Rectification, blocking, erasure & destruction
- Jurisdiction and procedure
- Appropriate measures shall be taken against unauthorised or unlawful processing of personal data and against accidental loss, destruction or damage to the data

The final principle refers to passing information to countries outside the EU who may not have the same levels of security.

1.5.6

Codes of Practice - sector codes of practice – many Trade Associations and Professional Bodies have a Code of Practice that guides members on how they should conduct their business. Most Codes of Practice include guidance on how to deal with customers. In particular they usually cover how members should deal with complaints and customer problems; guidance to customers on how to make a complaint/follow grievance procedure.

Ethical standards influence how decisions are made when resolving customer problems and the behaviour of employees towards customers.

Organisational ethics include personal qualities such as responsibility, integrity, and honesty, but also:

- openness
- ethical leadership
- pride in reputation
- social awareness

Level: 2

Credit value: 7

Unit aim

To enable candidates to develop and apply the practical skills required to support the customer service environment.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Apply the practical skills required to deliver effective customer service
2. Demonstrate how to meet customer needs and expectations
3. Communicate effectively with customers
4. Apply customer service improvements and develop self

Details of the relationship between the unit and relevant National Occupational Standards

This unit is linked to the ICS National Occupational Standards: NVQ Level 2 – 1, 5, 6, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 21, 22, 23, 31, 36, 37.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- COM Level 1 – C1.1, C1.2, C1.3; Level 2 – C2.1a and 1b, C2.2
- AON Level 1 - N1.1
- ICT Level 1 – ICT1.1, ICT1.2

Assessment and grading

This unit will be assessed by:

- an assignment covering practical skills and underpinning knowledge

Unit 202

Outcome 1

Supporting the Customer Service Environment

Apply the practical skills required to deliver effective customer service

Assessment Criteria

The learner can:

- 2.1.1 Identify the type of organisation
- 2.1.2 Identify the organisation's customers including internal and/or external and those with specific needs
- 2.1.3 Illustrate a customer service supply chain within an organisation
- 2.1.4 Maintain established customer records
- 2.1.5 Suggest a unique selling point or unique service offer for a product or service
- 2.1.6 Suggest ways of promoting a product or service to increase customer awareness
- 2.1.7 Compare the strengths and weaknesses of the promotional methods available

Notes for Guidance

2.1.1

Organisations are either in public, private or voluntary sectors.

- a) Public sector – eg NHS organisations – surgeries, hospitals; housing departments, organisations which provide preventative or supportive services where money is not the goal
- b) Private/commercial sector – eg retail – motivation is to increase profit, attract new customers and build on existing relationships
- c) Voluntary/not-for profit organisation – eg charity – may still sell goods and services

2.1.2

A customer can be an individual or an organisation and is somebody who receives customer service from a service deliverer. Customers can be **internal** eg from another part of the same organisation or colleagues; **external** eg individuals; businesses including suppliers.

The candidate should be able to identify the chosen organisation's customers be they internal and/or external and also those who require special assistance for example those who have specific needs eg health, language, age, cultural needs or who have specific learning difficulties.

2.1.3

It is essential to know who the people are in the organisation that contribute to the delivery of customer service. In a larger organisation it may be like a family tree – people and departments or different parts of the business have connections to one another. In a smaller organisation one person may have to take on many of the roles that are looked after by specialised departments in larger organisations. It is important to understand the roles of the people involved in the supply chain.

2.1.4

Candidates should demonstrate they can maintain existing customer records eg when customers:

- notify a change in personal circumstances (ie change of address)
- notify a change to a regular order
- place a new order
- complain or say 'thank-you'
- give feedback on a product or service – user evaluation
- make a warranty/guarantee claim

2.1.5

The candidate should suggest a USP (Unique Selling Point) or USO (Unique Service Offer) for a product or service. A USP is what makes a product different or better from its competitor(s) eg price, packaging, performance, market perception, quality, availability, meeting deadlines.

A USO is what makes a service different or better from its competitor(s) eg 24 hour availability.

USPs and USOs are used to differentiate what one organisation provides by way of products and/or services from another.

2.1.6

The candidate should be able to suggest methods of promoting products and /or services eg

- Leaflets
- Telephone calling
- Demonstrations
- Mailshots
- Promotional videos
- Newspaper (national and local) advertisements
- Television advertisements
- Local/national radio advertisements.

2.1.7

The candidate will demonstrate they can compare the factors that influence organisations to select a range of promotional methods by identifying their strengths and weaknesses in relation to cost, market penetration, method of communication and chose the most appropriate giving reasons for the choice.

Unit 202

Outcome 2

Supporting the Customer Service Environment

Demonstrate how to meet customer needs and expectations

Assessment Criteria

The learner can:

- 2.2.1 Identify how customers demonstrate their own individual needs and expectations
- 2.2.2 Identify customers with special requirements
- 2.2.3 Identify how to adapt methods of communication and behaviour to meet the individual needs of specified customers
- 2.2.4 Identify and use methods of checking customer satisfaction
- 2.2.5 Identify ways in which an organisation might improve its reputation

Notes for Guidance

2.2.1

The candidate will be able to identify how customers demonstrate their own individual needs and expectations identifying the service customers think they ought to have. They should also understand how expectations are formed by what people hear and see, what customers read in advertisements, catalogues, brochures, etc; what happens during the customer experience and what has happened to them in other customer service experiences.

2.2.2

Some customers have special requirements eg are angry, confused, hearing impaired, mobility impaired, sight impaired and these special requirements should be identified and their needs and expectations addressed.

2.2.3

The candidate should identify how they can adapt methods of communication and their behaviour to meet the individual needs of a range of customers eg those with language difficulties, health issues, different age groups, cultural differences, those with learning difficulties. It is always necessary to communicate in a clear, polite and confident way eg where there are language difficulties it may require that the service deliverer talks more slowly, clearly and without the use of jargon. The service deliverer should recognise they need to treat the customer with respect at all times and work with the individual to meet their needs.

2.2.4

The candidate should identify that there are various ways of checking customer satisfaction through informal feedback eg asking the customers or noting feedback given by customers or through formal feedback eg questionnaires, surveys etc. Customer satisfaction could also be checked through sales figures, complaint records etc.

2.2.5

Building a strong reputation leads to customer loyalty. Having a poor reputation leads to loss of business and a downturn in profits. A strong reputation means that an organisation has to attract customers to use its products or services, put things right if they go wrong, create a positive impression and change its reputation over time. To improve its reputation an organisation has to listen to its customers and meet their needs and expectations.

Assessment Criteria

The learner can:

- 2.3.1 Use different methods of communication
- 2.3.2 Identify the interpersonal skills which are required for effective team-working
- 2.3.3 Describe how to adapt own behaviour to meet the individual needs of the team
- 2.3.4 Use the telephone system efficiently and effectively
- 2.3.5 Identify the personal qualities required to deal with customer problems
- 2.3.6 Describe the skills required to deal with potentially stressful situations
- 2.3.7 Apply problem solving theories to resolving a customer service problem
- 2.3.8 Identify the process of solving a customer problem or complaint

Notes for Guidance

2.3.1

Different methods of communication are used in organisations eg

- Face-to-face
- Written communication eg letter, email
- Telephone and text

The candidate will be required to use some or all of the different methods of communication and ensure they do so effectively.

Face-to-face – is about eye contact and active listening. ‘Normal’ eye contact may differ across cultures; ‘active listening is about head nodding, gestures and repeating back phrases that are heard and confirmation of understanding.

Written communication is eg letter, email, memos and reports. There will be guidelines on when and how to use written communication eg house styles, language to be used etc. Written communication will be necessary when a formal response is required.

Telephone communication requires being able to operate the equipment efficiently and effectively; making sure customers are regularly informed when the service deliverer is accessing information to provide responses, of if they are going to be on hold, etc; speaking clearly and slowly to allow for the possibility that reception on the ‘phone line may not be perfect; adapting speech to meet individual needs of customer.

2.3.2

Maintaining effective working relationships requires people to:

- share workloads
- share information
- be able to work co-operatively with others
- show sensitivity to the needs and feelings of others
- work as a team to resolve customer problems and complaints
- apply teamwork to give good customer service
- work effectively with others to complete an allotted task
- respond positively to requests for help or support
- understand where and when to ask for help and support

Candidates will need to understand that they will need to use the following interpersonal skills:

- Oral communication skills
- Written communication skills
- Non-verbal communication skills (body language)
- Questioning skills
- Listening skills
- Decision-making skills
- Problem-solving skills
- Information-gathering skills
- Personal development skills
- Team working skills

2.3.3

There should always be awareness of the different personalities that could exist within a team eg

- Introvert
- confident
- assertive
- aggressive
- withdrawn

It should also be recognised that there may be a requirement to adapt personal behaviour to the needs and feelings of team members. There will also need to be an awareness of how an individual's behaviour can impact on team performance and that those individuals in the team may be working towards a common goal.

The candidate should consider they may need to be:

- Supportive
- Comfortable with disagreement and the ability to successfully overcome differences in opinion
- Able to discuss and listen
- Able to learn from experience, reviewing and improving performance in the light of both successes and failures

2.3.4

When making a telephone call the candidate should realise the importance of:

- making focused 'phone calls to customers
- preparing for the call
- checking to see if the call is to an existing customer or a potential or new customer
- knowing the organisation's guidelines and procedures for what should be said (which is particularly
- relevant if the organisation is a call centre where there may be a script)
- ensuring that equipment is available – pen, paper etc for notes; specific information etc.

Also when receiving 'phone calls from customer's organisation's guidelines will dictate:

- how to greet the customer
- the stages of greeting
- answering within given rings
- identifying and selecting the options available to respond to the customer.

The candidate should appreciate:

- the importance of using the telephone system effectively
- being able to operate the equipment efficiently and effectively
- making sure customers are regularly informed about own actions when accessing information to provide appropriate responses of if customers are going to be on hold, etc.

It is also important to:

- recognise the need to speak clearly and slowly to allow for the possibility that reception on the 'phone line may not be perfect
- adapt own speech to meet individual needs of customer, particularly when responding to customers' problems
- always remembering the effects of "smiling on the 'phone", particularly when dealing with a problem or complaint from a customer

2.3.5

The necessary qualities for dealing with customer problems are:

- Tact
- Good communication and listening skills
- Ability to gather information
- Problem solving skills
- Ability to work with others

2.3.6

Good communication, listening skills, problem solving skills as well as tact and the ability to remain calm are essential for dealing with potentially stressful situations.

To resolve a potentially stressful situation the candidate needs to appreciate it is essential to:

- focus your attention on the customer
- listen to the customer carefully and to make checks that the problem has been clearly understood
- ask the customer appropriate questions
- don't overload the questioning and ask one question at a time
- wait for the customer to answer
- listen actively and express empathy
- use non verbal cues (eg nodding the head)
- remain calm
- share problems where necessary within the tea.

2.3.7

To solve customer service problems the candidate can work with others or on their own in order to:

- understand the problem
- identify the cause
- discuss possible solutions
- solve the problem, removing negative emotions.

2.3.8

Organisations have recognised systems and procedures for solving and dealing with customer problems and complaints.

- To resolve a problem it is essential to understand the problem; it is necessary to listen to the customer carefully and to make checks that the problem has been clearly understood; make sure the team is aware of problems and share the customer feedback with the team.
- Pick the best solution to resolve the problem by identifying the options and working with others to identify and confirm the options to resolve the customer service problem within the organisational guidelines. If it is not possible to think of a solution to the problem it may be necessary to consider alternatives.
- Ensuring the options for resolving the customer problem/complaint are discussed/communicated with the customer with a view to seeking their agreement to the proposed solution.
- Strategies to deal with complaints – reacting to possible anger from customer face-to face, on the 'phone , in writing, etc; avoiding conflict; keep your customers by taking the HEAT (Hear, Empathise , Apologise, Take Ownership).

Unit 202

Outcome 4

Supporting the Customer Service Environment

Apply customer service improvements and develop self

Assessment Criteria

The learner can:

- 2.4.1 Devise a method for obtaining customer feedback
- 2.4.2 Identify why it is important to give a positive impression to customers about changes made to customer service procedures
- 2.4.3 Identify how own behaviour might affect the behaviour of others
- 2.4.4 Identify how to obtain useful and constructive feedback from others about own performance
- 2.4.5 Identify own strengths and weaknesses in relation to working within a customer service role
- 2.4.6 Apply the techniques of self assessment to look at strengths and weaknesses
- 2.4.7 Produce a Training Needs Analysis (TNA) for self
- 2.4.8 Prepare an individual learning/development plan which could be used as a basis for discussion with a relevant person, eg tutor, line manager, HR, training department

Notes for Guidance

2.4.1

The candidate should recognise that there is formal and informal feedback. Each customer service deliverer has a responsibility for gathering spontaneous customer feedback (informal) eg chance remarks or comments, either verbal or in writing, made by customers without being asked.

Organisations may also have formal methods of gathering customer feedback eg questionnaires, surveys, service calls.

The candidate will be required to devise a method for obtaining customer feedback which will be appropriate for the needs of the organisation.

2.4.2

There has to be confidence that the person delivering customer service knows and understands the features and benefits of the products or services. In order to sustain a long-term relationship with a customer – a repeat customer – it is essential to build on the customer's confidence in the service offered. A customer's loyalty and long-term relationship rely on their being comfortable with the service and that they receive excellent customer service.

It is important for a customer service deliverer to be aware of:

- how customer feedback is obtained and how this affects the way service is delivered and influences possible change.
- how to work with others to identify and support change in the way service is delivered
- the importance of keeping product and service knowledge up-to-date.
- why it is important to give a positive impression to customers about changes made by the organisation and ensure there is effective communication to avoid customers feeling threatened by changes.
- the need for continuous improvement in delivering customer service, exploring ideas for delivery in new and innovative ways.
- the importance of involving front line staff and supporting staff in continuous improvement.

2.4.3

The customer service deliverer's own personal presentation, approach and attitude will influence the customer's perception of the service delivered. If the customer expects to see staff in uniform who make a friendly approach and have a positive attitude they will not be satisfied if they are faced with someone who makes no approach and appears to not care. A service deliverer's presentation, approach and attitude can create the first impression a customer has of the organisation and it is important to realise that creating a good first impression is vital – you don't get a second chance to make a good first impression.

Service deliverers should always be professional despite difficult circumstances eg being under pressure through lack of time, during busy periods. Being aggressive for example may cause an otherwise calm person to mirror that behaviour and become aggressive too.

2.4.4

Feedback on own performance can be formal and informal. Examples of formal feedback are appraisals, job performance review; informal could be lunch meetings, team meetings.

Candidates should understand they can obtain information about their own performance and possible learning opportunities from the following:

- Feedback from others eg peers, superiors; 360 feedback
- The available learning and development opportunities
- Internal, eg training courses, job sharing, coaching, work-shadowing and external training

2.4.5

Strengths and Weaknesses – The candidate will need an understanding of the knowledge and skills required by a customer service deliverer and where they personally fit in relation to these. The candidate should be able to identify their own strengths and development needs in relation to their customer service role. By understanding their own strengths and development needs, the candidate should be aware of how formal personal development and action planning with regular reviews of progress against objectives can assist with the development of their own inter-personal skills.

2.4.6

The candidate should apply the techniques of self assessment eg Strengths, Weaknesses, Opportunities and Threats – a SWOT analysis.

2.4.7

The candidate should produce a Training Needs Analysis (TNA). A Training/learning Needs Analysis (TNA) is a review of learning and development needs for an individual.

It considers the skills, knowledge and behaviours that people need and how to develop them effectively.

2.4.8

Personal Development/Learning Plan (PDP) – after identifying own strengths, weaknesses and development needs it is essential the candidate puts the information into one document which can be a self-assessment document. Following this the candidate should work with an appropriate person to draw up a personal development plan. It is a document that records what the candidate intends to do to improve their customer service performance. It could include personal objectives; what they intend to do; the actions they will take; details of any support and resources needed, eg time and access to information; a target date for completion.

4 Assessment

4.1 Summary of assessment methods

For these units, candidates will be required to complete the following assessments:

Unit No.	Title	Assessment Method	Where to obtain assessment materials
201	Delivery of Effective Customer Service	City & Guilds GOLLA Online multiple choice test The assessment covers all of the knowledge outcomes.	Examinations provided on GOLLA.
202	Supporting the Customer Service Environment	Assignment 4417-202 Externally set assignment, locally marked and externally verified.	Download available from City & Guilds website www.cityandguilds.com

Time constraints

The following time constraints must be applied to the assessment of this qualification:

- The Gola on-line test is allocated one hour to complete.
- It is anticipated that an assignment should take no longer than three hours, in total to complete. Centres finding that assignments are taking longer, should contact the external verifier for guidance.
- All assignments must be completed and assessed within the candidate's period of registration. Centres should advise candidates of any internal timescales for the completion and marking of individual assignments.

4.2 Test specifications

The test specification for the unit is below:

Test 1: Unit 201

Duration: 1 hour

Outcome	No. of questions	%
1 Describe the principles of customer service	9	30
2 Understanding how customer needs and expectations are formed	8	26
3 Understand principles of responding to customers' problems or complaints	5	17
4 Identify the interpersonal and team working skills required in the service environment	3	10
5 Identify the legislation which supports the customer service	5	17
Total	30	100

5 Course design and delivery

5.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

Further guidance about initial assessment and induction, as well as a learning contract that centres may use, are available on the City & Guilds website.

5 Course design and delivery

5.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of this qualification before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of this qualification

City & Guilds recommends that centres address the wider curriculum, where appropriate, when designing and delivering the course. Centres should also consider links to the National Occupational Standards, Key/Core Skills and other related qualifications. Relationship tables are provided in Appendix 1 Relationships to other qualifications to assist centres with the design and delivery of the qualification.

For further information to assist with the planning and development of the programme, please refer to the following:

- A sample assignment is available on the City & Guilds website, www.cityandguilds.com.
- Useful material is available on SmartScreen, www.smartscreen.co.uk.

Appendix 1 Relationships to other qualifications

Links to other qualifications and frameworks

City & Guilds has identified the connections to the Level 2 NVQ in Customer Service and the Customer Service Apprenticeship. This mapping is provided as guidance and suggests areas of overlap and commonality between the qualifications. It does not imply that candidates completing units in one qualification are automatically covering all of the content of the qualifications listed in the mapping.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications. For example, units within a QCF qualification may be similar in content to units in the NQF qualification which the candidate may have already undertaken and this may present opportunities for APL.

This qualification has connections to the:

- Level 2 N/SVQ in Customer Service
- Level 2 Customer Service Apprenticeship

Key/Essential Skills (England, Wales and Northern Ireland)

Key Skills signposting

This qualification includes opportunities to develop and practise many of the underlying skills and techniques described in Part A of the standard for each Key Skills qualification. Where candidates are working towards any Key Skills alongside this qualification, they will need to be registered with City & Guilds for the Key Skills qualifications.

It should not be assumed that candidates will necessarily be competent in, or be able to produce evidence for, Key Skills at the same level as this qualification.

The 'signposts' below identify the **potential** for Key Skills portfolio evidence gathering that can be naturally incorporated into the completion of each unit. Any Key Skills evidence will need to be separately assessed and must meet the relevant standard defined in the QCA document '*Key skills qualifications standards and guidance*' (available from www.cityandguilds.com/keyskills).

Unit number/ and title	Communication	Application of Number	Information and Communication Technology
201	Level 1 C1.1, C1.2, C1.3 Level 2 C2.1 a and b, C2.2	Level 1 N1.1	Level 1 ICT1.1, ICT 1.2
202	Level 1 C1.1, C1.2, C1.3 Level 2 C2.1 a and b, C2.2	Level 1 N1.1	Level 1 ICT1.1, ICT 1.2

Functional Skills (England only)

The Key Skills qualifications are expected to be phased out in England from 2010, and will be largely replaced by the Functional Skills awards. More information about these qualifications is available from www.cityandguilds.com/functionalskills.

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains other useful information:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLA assessments

City & Guilds

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www.cityandguilds.com

Useful contacts

Type	Contact	Query
UK learners	T: +44 (0)20 7294 2800 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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