



Ascentis Level 1 Award and Certificate for  
Introduction to Customer Service  
Specification

**Ofqual Number:**

**Level 1 Award: 600/1686/3**  
**Level 1 Certificate: 600/1684/X**

Ofqual Start Date:

01/08/2011

Ofqual Review Date:

31/07/2020

Ofqual Certification Review Date:

31/07/2021

## ABOUT ASCENTIS

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Ascentis was originally established in 1975 as OCNW, a co-operative scheme between Universities and Colleges of Further Education. Ascentis was the first 'Open College' in the UK and served the needs of its members for over 34 years. Throughout this period, OCNW grew yet maintained its independence in order that it could continue to respond to the requirements of its customers and provide a consistently high standard of service to all centres across the country and in recent years to its increasing cohorts of overseas learners.

In 2009 OCNW became Ascentis - a company limited by guarantee and a registered educational charity.

**Ascentis** is distinctive and unusual in that it is both:

- **An Awarding Organisation** regulated by the Office of Qualifications and Examinations Regulation (Ofqual)

and

- **an Access Validating Agency (AVA)** for 'Access to HE Programmes' licensed by the Quality Assurance Agency for Higher Education (QAA).

Ascentis is therefore able to offer a comprehensive ladder of opportunities to centres and their students, including Foundation Learning, vocational programmes and progressing to QAA recognised Access to HE qualifications. The flexible and adult-friendly ethos of Ascentis has resulted in centres throughout the UK choosing to run its qualifications.

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# ASCENTIS INTRODUCTION TO CUSTOMER SERVICE

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## Introduction

Customer Service is not a discrete sector, but its key skills relate to a wide variety of sector areas. The Awards and Certificates for Introduction to Customer Service provide an introduction to the knowledge and skills needed in order to provide effective customer service in a range of sectors; it also gives learners the core knowledge of working within customer service and legislation.

There are several features of these qualifications that make them very appropriate for their target learners:

- Unit certification is available for each of the units
- Assessment is through the building up of a portfolio of evidence, allowing flexibility in terms of the learner putting together evidence most appropriate to their learning situation
- A flexible optional structure that allows learners and tutors to choose learning that is relevant to their specific needs
- An ability to combine units with units at a higher level to promote learner progression
- Verification and certification can be offered throughout the year, allowing maximum flexibility for centres

## Aims

The aims of these qualifications are:

- 1 To provide learners with an overview of customer service
- 2 To promote the gaining of work-related skills and knowledge in customer service
- 3 To prepare learners for further training within their chosen occupational area/s
- 4 To give learners an insight into the needs of customer service within their chosen occupational area/s.

## Target Group

These qualifications are aimed at young people aged 14+ who have an interest in a career in a range of sectors where customer service is important and also at adult learners.

**Ofqual Qualification Number:**

**Level 1 Award: 600/1686/3**

**Level 1 Certificate: 600/1684/X**

## Rationale for the Rules of Combination

The core knowledge in customer service is included in the mandatory units, and the optional units allow learners to choose areas of interest to them and which are appropriate to their learning environment.

## Rules of Combination

Ascentis Level 1 Award for Introduction to Customer Service				
Minimum credits: Level 1 Award: 7				
Group A - Mandatory Units For the Level 1 Award for Introduction to Customer Service learners must take the following mandatory unit				
Title	Level	Credit Value	GLH	Unit ref
Apply legislation, regulation and organisational procedures for customer service	Level 1	3	24	R/601/6071
Group B – Optional Units Credits from Group 2 optional units for Level 1 Award: 2 credits required which must be at Level 1, a further 2 credits can be taken at any level				

Ascentis Level 1 Certificate for Introduction to Customer Service				
Minimum credits: Level 1 Certificate: 13				
Group A - Mandatory Units For the Level 1 Award for Introduction to Customer Service learners must take the following mandatory units				
Title	Level	Credit Value	GLH	Unit ref
Apply legislation, regulation and organisational procedures for customer service	Level 1	3	24	R/601/6071
Working in customer service	Level 1	2	18	M/601/6076
Group B – Optional Units Credits from Group 2 optional units for Level 1 Certificate : 2 credits required which must be at Level 1, a further 6 credits may be taken at any level				

Group B – Optional Units	Level	Credit Value	GLH	Unit ref
The importance of appearance and behaviour in customer service	Entry 3	2	15	A/601/6047
Understand how to deal with queries and requests	Entry 3	3	20	R/601/6054
Communicate customers' problems with others	Entry 3	2	18	D/601/6056
The customer service job role	Entry 3	2	20	K/601/6058
Handling telephone calls from customers	Entry 3	2	18	M/601/6059
Communicate effectively with customers	Entry 3	2	18	M/601/6062
Effective relationships with customers and colleagues	Entry 3	2	20	A/601/6064

Working in a customer focused way	Entry 3	2	16	L/601/6067
Create a good impression to customers	Level 1	2	18	R/601/6068
Deal with queries and requests	Level 1	3	22	H/601/6074
Record and communicate customer problems	Level 1	2	18	K/601/6075
Answer telephone calls from customers	Level 1	2	18	T/601/6077
Positive communication with customers	Level 1	2	20	A/601/6078
Contribute to effective customer service	Level 1	2	20	F/601/6079
The customer service experience	Level 1	2	20	T/601/6080
Work in a customer-friendly way	Level 1	2	18	A/601/6081
<b>Credits from equivalent units:</b> Please contact the Ascentis office to request equivalences and ask to speak to a member of the Qualifications Development Team.				
<b>Credits from exemptions:</b> Please contact the Ascentis office to request exemptions and ask to speak to a member of the Qualifications Development Team				
<b>Barred combinations</b>				
Unit Title	Reference		Unit Title	Reference
The importance of appearance and behaviour in customer service (Entry 3)	A/601/6047	May not be taken with	Create a good impression to customers (Level 1)	R/601/6068
Legislation, regulation and procedures to follow in customer service (Entry 3)	J/601/6052	May not be taken with	Apply legislation, regulation and organisational procedures for customer service (Level 1)	R/601/6071
Understand how to deal with queries and requests (Entry 3)	R/601/6054	May not be taken with	Deal with queries and requests (Level 1)	H/601/6074
Communicate customers' problems with others (Entry 3)	D/601/6056	May not be taken with	Record and communicate customer problems (Level 1)	M/601/6075
The customer service job role (Entry 3)	K/601/6058	May not be taken with	Working in customer service (Level 1)	T/601/6076
Handling telephone calls from customers (Entry 3)	M601/6059	May not be taken with	Answer telephone calls from customers (Level 1)	T/601/6077
Communicate effectively with customers (Entry 3)	M/601/6062	May not be taken with	Positive communication with customers (Level 1)	A/601/6078
Effective relationships with customers and colleagues (Entry 3)	A/601/6064	May not be taken with	Contribute to effective customer service (Level 1)	F/601/6079
Introduction to Customer Service (Entry 3)	F/601/6065	May not be taken with	The customer service experience (Level 1)	T/601/6080
Working in a customer focused way (Entry 3)	L/601/6067	May not be taken with	Work in a customer-friendly way (Level 1)	A/601/6081

Unit certification is available for each of the units.

### **Recommended Guided Learning Hours**

The recommended guided learning hours for these qualifications is Level 1 Award: 57 & Level 1 Certificate: 109

### **Total Qualification Time**

The total qualification time for Level 1 Certificate for introduction to customer Service is 70.

The total qualification time for Level 1 Award for introduction to customer Service is 130.

### **Time Limit for the Process of Credit Accumulation and Exemptions**

Credit accumulation and exemptions are usually within the life span of these qualifications.

### **Recommended Prior Knowledge, Attainment and/or Experience**

No recommended prior learning is required.

### **Age Range of Qualification**

These qualifications are suitable for young people aged 14-19 and adult learners.

### **Opportunities for Progression**

It is intended that these qualifications will help learners towards the following progression routes:

- Further training within their chosen occupational area/s
- Level 1 or Level 2 qualifications in a relevant occupational area.

### **Centre Recognition**

These qualifications can only be offered by centres recognised by Ascentis and approved to run these qualifications. Details of the centre recognition and qualification approval process are available from the Ascentis office (tel. 01524 845046) or from the website at [www.ascentis.co.uk](http://www.ascentis.co.uk).

### **Qualification Approval**

If your centre is already a recognised centre, you will need to complete and submit a qualification approval form to deliver these qualifications. Details of the qualification approval process are available from the Ascentis office (tel. 01524 845046) or from the website at [www.ascentis.co.uk](http://www.ascentis.co.uk).

### **Registration**

All learners must normally be registered with Ascentis within seven weeks of commencement of a course via the Ascentis electronic registration portal.

### **Status in England, Wales and Northern Ireland**

These qualifications are available in England, Wales and Northern Ireland. They are only offered in English. If a centre based overseas (including Scotland) would like to offer these qualifications, they should make an enquiry to Ascentis.



## Reasonable Adjustments and Special Considerations

In the development of these qualifications Ascentis has made every attempt to ensure that there are no unnecessary barriers to achievement. For learners with particular requirements reasonable adjustments may be made in order that they can have fair assessment and demonstrate attainment. There are also arrangements for special consideration for any learner suffering illness, injury or indisposition. Full details of the reasonable adjustments and special considerations are available from the Resources/Key Documents area of the Ascentis website [www.ascentis.co.uk](http://www.ascentis.co.uk) or through contacting the Ascentis office.

## Enquiries and Appeals Procedure

Ascentis has an appeals procedure in accordance with the regulatory arrangements in the Ofqual *General Conditions of Recognition*<sup>1</sup>. Full details of this procedure, including how to make an application, are available from the Resources/Key Documents area of the Ascentis website [www.ascentis.co.uk](http://www.ascentis.co.uk) or through contacting the Ascentis office.

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<sup>1</sup> The Scottish Qualifications Authority (SQA) have developed some high level principles that cover the same requirements as the Ofqual Conditions. These are the SQA Accreditation Regulatory Principles (2011).

## ASSESSMENT AND VERIFICATION ARRANGEMENTS

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### Assessment

All units are internally assessed through the learner building up a portfolio of evidence that covers the relevant assessment criteria, internally assessed and verified by the centre and then externally verified by Ascentis.

On completion of the learners' evidence for either the individual units or the award/certificate, the assessor is required to complete the Summary Record of Achievement for each learner. The Summary Record of Achievement asks assessors and the internal verifier to confirm that the rules of combination have been followed. This is particularly important in cases where a learner has taken units at different levels. The Summary Record of Achievement form is provided in Appendix 1.

Centres are required to retain all evidence from all learners for external verification and for 4 weeks afterwards should any appeal be made.

### Internal Assessment

Evidence for each unit is through building up a portfolio of evidence to demonstrate that all the assessment criteria within the unit have been achieved. The evidence will be assessed by the assessor at the centre, who may or may not be the tutor teaching the course.

Portfolios of evidence should include a variety of evidence to demonstrate that the assessment criteria for each unit have been met. Examples of evidence that could be included are:

- Observation record
- Questions and discussions
- Photographs
- Video
- Worksheets
- Tape recordings
- Self assessments
- Workbook activities
- Role play

If the learner fails to meet the assessment criteria on the first attempt at an activity they may redraft the work following feedback given by the tutor. However tutors must not correct the work of the learner, and all feedback given by the tutor must be included within the learner's evidence.

Learners' portfolio work should include a tracking sheet to show where the evidence for each assessment criterion is to be found. Some activities could produce evidence for more than one unit, which is acceptable as long as there is clear reference to this on the tracking sheet. Examples of tracking sheets are found in Appendix 2.

Learners can carry out activities in a simulated environment as it is not a requirement for a learner to be worker based.

### Verification

#### Internal Verification

Internal verification is the process of ensuring that everyone who assesses a particular unit in a centre is assessing to the same standards i.e. consistently and reliably. Internal verification activities will include: ensuring any stimulus or materials used for the purposes of assessment are fit for purpose; sampling assessments; standardisation of assessment decisions; standardisation of internal verification decisions. Internal Verifiers are also responsible for supporting assessors by providing constructive advice and guidance in relation to the qualification delivered.

Further information is available from the Resources/Key Documents section of the Ascentis website [www.ascentis.co.uk](http://www.ascentis.co.uk)

## External Verification

Recognised centres will be visited in accordance with a verification model that is considered most appropriate for the provision. More frequent verifications can be requested from the Ascentis Quality Assurance team, for which there is usually an additional charge. External verification will usually focus on the following areas:

- A review of the centres management of the regulated provision
- The levels of resources to support the delivery of the qualification, including both physical resources and staffing
- Ensuring the centre is using appropriate assessment methods and making appropriate assessment decisions according to Ascentis' requirements
- Ensuring the centre has appropriate internal quality assurance arrangements as outlined within the relevant qualification specification
- Checking that the centre is using appropriate administrative arrangements to support the function of delivery and assessment

External Verifiers will usually do this through discussion with the centre management team; assessment and Internal Quality Assurance staff; verifying a sample of learners' evidence; talking to learners, reviewing relevant centre documentation and systems.

## Knowledge, Understanding and Skills required of Assessors and Internal Verifiers

Centres must ensure that those delivering and assessing Ascentis qualifications are occupationally knowledgeable and competent within the relevant subject area.

Centres are responsible for ensuring that all staff involved in the delivery of the qualification are appropriately qualified. Ascentis will not be held responsible for any issues that relate to centre staffing which could impact on the successful delivery, assessment and internal quality assurance of our qualifications.

Those delivering the qualification should preferably hold or be working towards a recognised teaching qualification. Assessors must be able to make appropriate assessment decisions. Internal Quality Assurers need to have knowledge and experience of the internal quality assurance processes.

Centres are required to ensure that appropriate training and support is in place for staff involved in the delivery, assessment and internal verification of Ascentis qualifications.

Ascentis offers free support for centres. Further information on the support that is available can be found on Quartz Web or the Ascentis website.

# MANDATORY UNITS

## UNIT SPECIFICATIONS

### Legislation, regulation and procedures to follow in customer service

**Credit Value of Unit: 2**

**GLH of Unit: 20**

**Level of Unit: Entry 3**

#### Introduction

Every job role has rules about what the learner will and will not be able to do for customers. Some of the rules are legal and will apply to all job roles, others will be specific to a chosen or given role. This unit covers what the learner needs to know and understand all the rules of this given or chosen job role and how they apply.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know organisational procedures for customer service	1.1	State the procedures for a particular customer service job
		1.2	State the limits of responsibility and authority for a particular job in customer service
2	Know how to protect the security of property and information when delivering customer service	2.1	State organisational procedures for the security of property when delivering customer service
		2.2	State organisational procedures for the security of information about customers when delivering customer service
3	Know the health and safety rules that relate to a customer service job	3.1	State the health and safety rules that relate to a customer service job
		3.2	State the health and safety risks to customers and colleagues
4	Know the relevant external rules in a customer service job	4.1	List legislation and external regulation that impact on a customer service job
		4.2	List things that should be done in a customer service job because of regulation
		4.3	State your responsibilities for treating customers equally

#### Indicative Content

**The learner needs to be given or choose a specific job role and, for this, be able to state:**

- The procedures to follow
- The limits of their responsibility (at this level they would have basic responsibilities to complete work only)
- The recognised security requirements for property
- The expected security requirements regarding information about customers (who has access, confidentiality, data protection)
- The health and safety rules that must be followed
- The health and safety risks to customers and colleagues
- Know the relevant external legislation that affects the specific job role
- Know what must be done because of regulation
- Know how to treat customers equally and why this needs to be done

## UNIT SPECIFICATIONS

### Introduction to customer service

**Credit Value of Unit: 2**

**GLH of Unit: 20**

**Level of Unit: Entry 3**

#### Introduction

This unit is about what to expect in a customer service job role.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know basic customer service terms	1.1	Describe the differences between an external and an internal customer
		1.2	State how different services and products could relate to each other and assist in providing customer satisfaction
		1.3	Identify regularly used customer service terms
2	Know the customer service process and its importance	2.1	Identify what is meant by customer expectations
		2.2	Identify what is meant by customer satisfaction
		2.3	State how customer satisfaction results from meeting customer expectations
		2.4	State the consequences if customer service does not meet customer expectations
		2.5	State why good customer service matters to organisations
3	Be able to learn from own experience of customer service	3.1	Identify situations when they are a customer
		3.2	Describe what matters to them when they are a customer

#### Indicative Content

**For the given or chosen job role the learner needs to be able to:**

Describe:

- The difference between internal and external customers
- What matters to them when they themselves are a customer

State:

- How different services and products relate to each other and how this can help with customer satisfaction
- How customer satisfaction comes from meeting their expectations
- The consequences of poor customer service
- Why good customer service matters within the chosen or given job role

Identify:

- The regularly used customer service terms within the chosen or given job role
- Situations that they have learnt from when being a customer

## UNIT SPECIFICATIONS

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### Apply legislation, regulation and organisational procedures for customer service

**Credit Value of Unit: 3**

**GLH of Unit: 24**

**Level of Unit: Level 1**

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#### Introduction

This unit is about working safely and meeting organisational procedures. It is also concerned with the legislation and regulation that affects customer service roles in general and more specifically within individual job roles.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Be able to follow customer service procedures for a particular job	1.1	Describe the limits of own responsibility and authority for a particular job in customer service
		1.2	Carry out steps in customer service procedures for a particular job
2	Be able to protect the security of property and information when delivering customer service	2.1	Observe organisational procedures for the security of property when delivering customer service
		2.2	Observe organisational procedures for the security of information when delivering customer service
3	Know the health and safety requirements delivering customer service	3.1	Describe the health and safety rules that relate to delivering customer service
		3.2	Describe the main health and safety risks for customers and colleagues when delivering customer service
4	Know other external rules that impact on customer service delivery	4.1	Describe the key legislation and external regulations relating to customer service delivery
		4.2	Describe actions to avoid because of legislation and regulation when delivering customer service
		4.3	Describe the importance of treating customers equally when delivering customer service

## Indicative Content

The learner may already work in a customer service role or choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

**For their chosen customer service job role the learner needs to be able to:**

Describe:

- The limits of their authority
- The health and safety rules that relate to the delivery of customer service
- The main health and safety risks for customers and colleagues
- The key legislation and external regulation that applies to the job role
- The actions that must be avoided because of legislation and regulation
- The importance of treating customers equally

Observe and demonstrate:

- Steps in customer service procedures for their chosen job role
- How to protect the security of information and property

Examples of regulation and legislation:

- Health and Safety at Work Act (HASAW)
- COSSH
- The Sale and Supply of Goods Act
- Consumer Protection Act
- Trades Description Act
- Equality and Diversity
- RIDDOR
- Data Protection
- Codes of Practice (this will be specific to each customer service requirement)
- Violence and Bullying



## UNIT SPECIFICATIONS

### Working in customer service

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Level 1**

#### Introduction

There are rules set by organisations that state what a job holder can and cannot do for customers. This unit requires a learner to show that they know and understand the rules that apply to the customer service delivered within their chosen job role.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know the customer service principles that affect a customer related job	1.1	State the service offer of the organisation
		1.2	Describe the role of a selected job holder in delivering the service offer
2	Know what is required of a particular job holder to meet customer expectations	2.1	Describe the information the job holder needs to meet customer service expectations
		2.2	Describe how the behaviour of someone in a customer service job affects the customer experience
3	Know the outline of entry level customer service jobs	3.1	Identify jobs delivering customer service
		3.2	Identify the customers for those jobs
		3.3	Describe what customers expect from somebody doing those jobs
4	Know the outline of customer service jobs that may be accessible after experience in first step jobs	4.1	Identify jobs that may follow from experience in first step customer service
		4.2	Identify the customers for those jobs
		4.3	Describe what customers expect from someone doing those jobs

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For their chosen customer service job role the learner needs to be able to:

State:

- The service offer of the organisation

Describe:

- The role of the identified job holder in delivering the service offer
- The information the job holder will need to fulfil customer service expectations
- How the behaviour of the job holder affects the customer experience

#### The learner will also need to know about other customer related job roles and will need to be able to:

Identify:

- Jobs delivering customer service
- The customers for the identified jobs
- Jobs that are accessible with experience from the first steps into customer service

Describe:

- What customers would expect from each of the identified jobs

# OPTIONAL UNITS

## UNIT SPECIFICATIONS

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### The importance of appearance and behaviour in customer service

**Credit Value of Unit: 2**

**GLH of Unit: 15**

**Level of Unit: Entry 3**

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#### Introduction

This unit covers the customer service behaviours that have the most impact on the way the customer may see the learner and the chosen or given job role. They may be external to the chosen or given job role or they may be internal customers.

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
The learner will be able to	The learner can
1 Know the dress requirements in customer service roles	1.1 State the appropriate dress in a particular service job
	1.2 State inappropriate dress in a particular customer service job
2 Know how general appearance affects the way customers react	2.1 Identify customer expectations of appearance in a particular customer service job role
	2.2 Identify personal appearance that could cause negative customer reaction
3 Know how to interact with customers	3.1 State the importance of making a good first impression on customers
	3.2 Describe how to greet customers politely and positively
	3.3 State how to recognise when a customer wants or needs attention
	3.4 State how to respond when a customer wants or needs attention
	3.5 Describe how to focus on customers and avoid distractions when dealing with them
	3.6 State the importance of thanking customers for their business or for information given

## Indicative Content

Learners need to understand and be able to describe how their behaviour affects the impression that customers form of the service they are receiving.

This unit is all about communicating with customers and giving a **positive impression** whenever dealing with a customer. The learner will learn how to create a positive impression within a specific job role and the customer service standard required.

This unit gives the opportunity to prove that the learner understands how to create a positive impression.

Learners should be able to give a description of appropriate / inappropriate dress for a specific customer service role. All working environments require some form of customer service whether this is between departments or external customers. The description must be clearly linked to a job role and state why this is indeed appropriate / inappropriate for that particular role

**Examples of customer service roles dealing with external customers:** Retail shop assistant, receptionist (doctor's surgery, office, hotel, hospital, college, hairdressers etc.), hairdresser, motor mechanic, gardener, sports assistant, and bank.

**Examples of customer service roles dealing with internal customers:** Office worker (bank, retail, doctor's surgery, hospital, warehouse, private company, etc.), motor mechanic, sports assistant, and accountant.

Customers' expectations will depend on the type of environment they are in and whether they are external or internal to the business. Learners need to identify what is acceptable as normal practice for a specific customer service role

**Examples of expectations:** Smart, clean clothing, neat and tidy hair, properly applied make-up, a cheerful smile, positive body language

**Examples of possible negative appearance:** Too much make-up, revealing clothing, body piercings, facial expressions such as frowning, negative body language

Learners need to be able to state why first impressions are important; customers will make a judgement about the customer service they receive

**First impressions include:** how to greet customers, i.e. polite, positive, friendly, smiling, correct dress code, manners, personal hygiene.

Learners need to know how to respond when a customer needs or wants attention: smile, ask if they can help, ask appropriate / open questions to gain information, show consideration. Learners need to be able to describe how to focus on customers and avoid distractions when dealing with them; pay attention to their requests, use eye contact, listening skills. Learners need to be able to state the importance of thanking customers for their business or for information given, i.e. good customer service, builds good relationships, repeat custom, additional customers.

## UNIT SPECIFICATIONS

### Understand how to deal with queries and requests

**Credit Value of Unit: 3**

**GLH of Unit: 20**

**Level of Unit: Entry 3**

#### Introduction

Within a given or chosen job role the learner needs to understand what their customers want and how they feel. The unit give learners the knowledge to share information with them and listen carefully to them.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know the services or products of a section or department within an organisation	1.1	List the services or products a selected section or department offers
		1.2	Describe the key features of the services or products a selected section or department offers
2	Know the types of question that customers will ask	2.1	List the most frequently asked questions about a selected section or department's services or products
		2.2	State the preferred answers to the most frequently asked questions about a selected section or department's services or products
3	Know how to recognise when a customer has a query or request	3.1	Listen closely to questions from customers
		3.2	Identify when questions from customers require a specific response or action
4	Know how to clarify details of queries or requests from customers	4.1	State how to check with customers that they have heard their questions correctly
		4.2	State the importance of keeping customers informed about actions on their queries or requests

#### Indicative Content

##### For the identified job role the learner needs to be able to:

List :

- The specific products or services related to it
- The key features of the products or services
- The most frequently asked questions

State:

- The preferred answers to the frequently asked questions
- How to check with customers that they have heard their questions correctly: summarise information, use of correct questions, differences with dialect, language and accents
- The importance of keeping customers informed about actions

Identify:

- When questions from customers require a specific response or action

Know how to:

Listen closely to customers' questions: active listening, identify the most important things, the difference between hearing and listening, differences with dialect, language and accents.

## UNIT SPECIFICATIONS

### Communicate customers' problems with others

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Entry 3**

#### Introduction

This unit covers what a learner needs to understand how to collect useful information for others to deal with. The learner needs to understand how to identify that there is a problem, discover further information, and pass this information on to others.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know how to collect information about a problem from a customer	1.1	List the information to seek when asking a customer for details about a problem
		1.2	Describe how to check understanding of a problem with a customer
2	Be able to log information about a customer problem	2.1	Take notes about a customer problem
		2.2	Check with a customer that notes about the problem are correct
3	Know how to select information about a customer problem to pass to a colleague	3.1	State the importance of selecting the correct information to identify the customer and the problem
		3.2	Identify the details of a customer problem that should be passed to a colleague
4	Know how to communicate with a customer and a colleague about the problem	4.1	State the importance of passing full information about the customer problem to a colleague accurately and promptly
		4.2	State the importance of keeping a customer informed about what is being done about the problem

#### Indicative Content

##### For the given or chosen job role the learner needs to be able to:

List :

- The information to seek

Describe

- How to check understanding of the problem

Identify:

- The details of the problem that need to be passed on

Take notes:

- About the problem
- Check with the customer that the notes are correct

State the importance of:

- Selecting the correct information
- Passing on full information
- Keeping the customer informed

## UNIT SPECIFICATIONS

### The customer service job role

Credit Value of Unit: 2

GLH of Unit: 20

Level of Unit: Entry 3

#### Introduction

This unit covers how customer service is delivered. Learners need to understand that the way in which they do a specific job affects the level of customer service. All job roles require that the work carried out is done properly. This involves following procedures and completing tasks correctly. This will include understanding the parts of the job role that are the most important to good customer service.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know what the delivery of good customer service involves	1.1	List the information a person needs to do a customer service job
		1.2	List the parts of a job which impact directly on customer service
		1.3	Describe the key individual skills needed to do a customer service job
		1.4	Describe how the way somebody behaves in a job affects the customer experience
2	Know the requirements of an entry level customer service job	2.1	Describe a job that may be a first step in delivering customer service
		2.2	Identify who the customers are
		2.3	Describe what customers expect from somebody doing that job
3	Know the outline of a job involving customer service that may be accessible after gaining experience at entry level	3.1	Describe a job that may follow from gaining experience in a first step customer service job
		3.2	Identify who the customers are
		3.3	Describe what customers expect from somebody doing that job

#### Indicative Content

At entry level the learner needs to choose or be given a specific job role to understand and learn what is required in order to fulfil the role properly.

##### For that role the learner needs to be able to:

List:

- The information needed to carry out the role properly – up to date information about services and products, reference manuals, price lists etc.
- The parts of the jobs that impact on customer service – the best method to communicate, telephone, email, post, webinar
- The key individual skills needed for that role – politeness, knowledge of topic, efficient, professional, organised, good listener, good timekeeping

Describe:

- How behaviour affects the way customer service is delivered
- A job that is considered to be the first step into customer service
- What a customer would expect from that specific job role
- A job that may follow on from having experience in customer service and what customers would expect from that role

Identify:

- Who the customers are in **both** the entry level role **and** the next role having gained experience

## UNIT SPECIFICATIONS

### Handling telephone calls from customers

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Entry 3**

#### Introduction

This unit is about preparing to deal effectively with customers and how to use good communication skills to agree a positive outcome for both the customer and the business. The learner needs to know how to greet a customer using the telephone and how to communicate with customers.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know how to greet customers calling on the telephone	1.1	State the importance of answering the telephone promptly
		1.2	Identify appropriate and friendly greetings to use when answering customer telephone calls
2	Know how to deal with customers calling on the telephone	2.1	State the importance of identifying the customer's needs
		2.2	State how to confirm customer needs
		2.3	Describe how to pass on calls from customers to appropriate colleagues when customer needs are outside their own authority
		2.4	State the importance of closing the call, thanking customers for their business or for information given
3	Know how to deal with communication problems whilst on the telephone	3.1	State the types of communication problems that may occur
		3.2	Describe how to focus on the call and avoid distractions

#### Indicative Content

At entry level the learner needs to choose or be given a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For the given or chosen job role the learner needs to be able to:

##### State:

- Why it is important to answer the telephone promptly
- The importance of identifying customer needs
- How to confirm the customer needs
- Why it is important to close the call properly, thanking the customer
- The types of communication problems that may occur

##### Identify:

- The appropriate greeting to use

##### Describe:

- How and when to pass on the caller when they cannot deal with the query
- How to keep focussed on the call and avoid distractions



## UNIT SPECIFICATIONS

### Communicate effectively with customers

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Entry 3**

#### Introduction

This unit is about dealing with customers face to face or in person. When dealing with customers in this way, good feelings about the way the learner looks and behaves can improve how the customer feels about the transaction and gives them greater satisfaction. Verbal and non-verbal communications are important as well as keeping focused on the customer's needs.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know the importance of speaking clearly to customers	1.1	State why it is important to speak clearly to customers
		1.2	State how to speak clearly to customers about services or products
		1.3	List the information to include when answering questions from customers about services or products
2	Know the importance of listening actively to customers	2.1	State how to give customers their full attention when listening to them
		2.2	State why it is important to listen to customers
3	Know the importance of using information from customers to contribute to good customer service	3.1	Describe how to confirm with customers that details are correct
		3.2	State the importance of reacting quickly to what they have heard from customers
		3.3	List information they might hear from customers that should be passed to colleagues

#### Indicative Content

At entry level the learner needs to choose or be given a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For the given or chosen job role the learner needs to be able to:

State:

- Why it is important to speak clearly
- How to speak clearly
- How to give customers their full attention
- Why it is important to listen to customers
- Why it is important to react quickly to customer requests

List :

- The information that needs to be included when answering requests
- The information that needs to be passed on to colleagues

Describe

- How to confirm that customer details are correct

## UNIT SPECIFICATIONS

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### Effective relationships with customers and colleagues

**Credit Value of Unit: 2**

**GLH of Unit: 20**

**Level of Unit: Entry 3**

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#### Introduction

This unit covers how learners can put other methods to use for good customer service. Customers like to deal with people who show they are willing and keen. Customers like to think that learners and their colleagues want to help. They can show this by being friendly and positive and giving them their full personal attention.

Learning Outcomes	Assessment Criteria
The learner will be able to	The learner can
1 Know how to relate effectively to customers	1.1 Identify methods of communication when dealing with customers 1.2 Identify language to avoid because customers may consider it to be offensive 1.3 Identify language to avoid because customers may consider it too familiar
2 Know how to relate effectively to colleagues in a customer service team	2.1 State why friendliness and helpfulness are useful in customer service teamwork 2.2 State how to help colleagues when doing routine customer service tasks 2.3 State what help could be reasonably expected from colleagues when carrying out routine customer service tasks 2.4 State what help colleagues could reasonably expect to be given when carrying out routine customer service tasks
3 Know the importance of positive body language when dealing with customers and colleagues	3.1 State what is meant by positive body language 3.2 State the importance of avoiding negative body language 3.3 State why it is important to use eye contact and a smile when talking to customers and colleagues 3.4 State why it is important to use and react to body language when dealing with customers and colleagues

## Indicative Content

At entry level the learner needs to choose or be given a **specific job role** to understand and learn what is required in order to fulfil the role properly.

**For the given or chosen job role the learner needs to be able to:**

Identify:

- Methods of communication when dealing with customers
- The language to avoid – offensive, too familiar

State:

- Why friendliness and helpfulness are useful
- How to help colleagues with routine tasks
- What help could be reasonably expected from colleagues and what they in turn could expect
- What is meant by positive body language
- Why it is important to avoid negative body language
- Why it is important to use eye contact and to smile
- Why it is important to use and react to body language

## UNIT SPECIFICATIONS

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### Working in a customer focused way

**Credit Value of Unit: 2**

**GLH of Unit: 16**

**Level of Unit: Entry 3**

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#### Introduction

This unit shows learners the basic acceptable standards of behaviour and attitudes that need to be achieved. Learners need to know how to create the right impression and show a positive attitude in order to avoid customers becoming upset or offended.

Learning Outcomes	Assessment Criteria
The learner will be able to	The learner can
1 Know how to show a polite and willing approach to customers	1.1 State the importance of being positive and polite when dealing with customers
	1.2 State the importance of dealing with customers in an appropriate timescale
	1.3 Identify what they can do to show the customer they are willing and enthusiastic
2 Know how to show consideration to customers	2.1 State the importance of being considerate to customers
	2.2 Identify what impresses customers
	2.3 Identify what might annoy customers
	2.4 State how to put customers at ease
	2.5 State how to show respect to customers

#### Indicative Content

At entry level the learner needs to choose or be given a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For the given or chosen job role the learner needs to be able to:

State:

- The importance of being positive and polite
- Why it is important to deal with customers within an appropriate timescale
- How to show customers that they are reliable
- The importance of being considerate
- How to put customers at ease
- How to show respect

Identify:

- What they can do to show they are willing and enthusiastic
- What impresses customers
- What annoys customers

## UNIT SPECIFICATIONS

### Create a good impression to customers

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Level 1**

#### Introduction

This unit is about communicating with customers and giving a positive impression. The learner needs to understand that every detail of their behaviour counts when dealing with customers. How they dress also creates an impression on their customers.

Learning Outcomes	Assessment Criteria
The learner will be able to	The learner can
1 Be able to dress appropriately for a customer service job	1.1 Describe appropriate dress requirements in different customer service jobs
	1.2 Identify inappropriate dress in different customer service jobs
	1.3 Dress in a way that meets customer expectations in a particular job
2 Be able to demonstrate an appropriate appearance for a customer service job	2.1 State the importance of making a good first impression on customers
	2.2 Identify personal appearance that may cause a negative reaction from customers
	2.3 Present self in a way that makes a positive impression on customers
3 Be able to relate effectively to customers	3.1 Describe methods of communicating with customers
	3.2 Describe why offensive language should be avoided when dealing with customers
	3.3 Use appropriate methods of communication when dealing with customers

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For the given or chosen job role the learner needs to be able to:

Describe:

- The appropriate dress requirements (smart, clean, professional)
- Appropriate dress for other customer service job roles
- Methods of communicating with customers (verbal and non-verbal)
- Why offensive language should be avoided

Identify:

- Inappropriate dress across **different** customer service job roles
- Personal appearance that may cause a negative reaction

State

- Why it is important to make a good first impression

## UNIT SPECIFICATIONS

### Deal with queries and requests

**Credit Value of Unit: 3**

**GLH of Unit: 22**

**Level of Unit: Level 1**

#### Introduction

This unit is about dealing with customer queries and requests within a chosen job role. The learner may already work in a customer service role or may choose a specific job role to understand and learn what is required in order to fulfil the role properly.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know the services and products of a section or department	1.1	Describe the services and products of a selected section or department
		1.2	List the key features and benefits to customers of the services and products of a selected section or department
2	Know the customer's interests about the services and products of a section or department	2.1	Describe the features and benefits of services and products that most interest customers
		2.2	Identify questions that customers frequently ask about services and products and the preferred answers to those questions
3	Be able to clarify customer queries or requests	3.1	Listen closely to questions and responses from customers
		3.2	Clarify queries and requests from customers
4	Be able to deal with queries or requests from customers	4.1	Deal with a query or request in a positive way
		4.2	Seek information or support if the query or request is outside their own knowledge or authority

#### Indicative Content

**For the identified customer service job role the learner needs to be able to:**

Describe:

- The products and services of their select department or section

List:

- the key features and benefits of products and services

Identify:

- The questions that customers frequently ask and the preferred answers

Demonstrate:

- How to listen to, clarify and deal with customer queries or requests
- Seek information or support when the query is outside their knowledge or responsibility

## UNIT SPECIFICATIONS

### Record and communicate customer problems

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Level 1**

#### Introduction

This unit is about being able to record, collect and communicate information about customer problems.

Learning Outcomes		Assessment Criteria
The learner will be able to		The learner can
1	Be able to collect detailed information from a customer with a problem	1.1 Question a customer to collect detailed information about a problem
		1.2 Check why the customer believes that their expectations are not being met
2	Be able to record detailed information about a customer problem	2.1 Keep a record of details about a customer service problem
		2.2 Confirm the accuracy of the record of a customer problem with the customer
3	Be able to communicate a customer problem to a colleague and a customer	3.1 Select information about the customer and the problem that is sufficient for a colleague to understand it
		3.2 Inform a colleague about the customer problem
		3.3 Give the customer information about the steps being taken to deal with the problem

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For their chosen customer service job role the learner needs to be able to:

##### Use:

- Appropriate questioning skills to gain information – open questions

##### Check:

- Why the customer believes that their expectations are not being met – good listening skills

##### Record:

- Details of customer service problems and confirm their accuracy – organisational skills

##### Select:

- Information about the customer and problems so that a colleague can understand it – name, date, contact, problem, timescale, information / advice given
- The information needed to keep the customer involved – timescale, outcome, advice, reassurance

## UNIT SPECIFICATIONS

### Answer telephone calls from customers

**Credit Value of Unit: 2**

**GLH of Unit: 18**

**Level of Unit: Level 1**

#### Introduction

This unit is about preparing to deal effectively with customers and how to use good communication skills to agree a positive outcome for both the customer and the business. The learner needs to know how to greet a customer using the telephone and how to communicate with customers.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Be able to greet customers calling on the telephone	1.1	Explain why an appropriate greeting is needed for customers
		1.2	Use the appropriate greeting when answering customer calls
2	Be able to deal with incoming customer telephone calls	2.1	Use questions to clarify customer wishes and needs during telephone calls
		2.2	Deal with the customer's requests within the limits of own authority
		2.3	Pass on calls from customers to appropriate colleagues when customer needs are outside their own authority
3	Be able to respond to requests from customers	3.1	Exchange information with customers over the telephone
		3.2	Summarise information from customers to check they have heard requests properly

#### Indicative Content

Many customer service roles rely on dealing with telephone calls as a key part of customer service. Customer expectations are usually high in such cases because they have had a chance to prepare for the call. Quite often customers are in a negative frame of mind from the start of the conversation.

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For their chosen customer service job role the learner needs to be able to:

Explain:

- Why an appropriate greeting is needed

Demonstrate:

- The use of appropriate greeting for their chosen job role
- The use of questions to clarify customer needs
- How to deal with customer requests
- How and why it is necessary to pass on customers to colleagues
- How to exchange and summarise information with customer



## UNIT SPECIFICATIONS

### Positive communication with customers

**Credit Value of Unit: 2**

**GLH of Unit: 20**

**Level of Unit: Level 1**

#### Introduction

This unit is about dealing with customers face to face or in person. When dealing with customers in this way, good feelings about the way a learner looks and behaves can improve how the customer feels about the transaction and give them greater satisfaction. Verbal and non-verbal communications are important as well as keeping focused on the customer's needs.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Be able to hold conversations with customers	1.1	Use questions to develop a customer conversation
		1.2	Describe how to listen actively to customers
		1.3	Listen actively to customers
		1.4	Close a conversation with a customer
2	Be able to respond to requests from customers	2.1	Exchange information with customers in a conversation
		2.2	Summarise information from customers to check they have heard correctly
		2.3	Pass information from customers to colleagues
3	Be able to use body language when dealing with customers	3.1	Identify types of body language that affect customers positively
		3.2	Identify types of body language that affect customers negatively
		3.3	Use positive body language when dealing with customers

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

#### For their chosen customer service job role the learner needs to be able to:

Use:

- Questions and positive body language when dealing with customers

Describe:

- How to listen actively to customers

Demonstrate:

- How to actively listen and exchange information
- Summarise the conversation and close the discussion
- Pass on information to colleagues

Identify:

- Different types of body language and how they affect customers both positively and negatively

## UNIT SPECIFICATIONS

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### Contribute to effective customer service

**Credit Value of Unit: 2**

**GLH of Unit: 20**

**Level of Unit: Level 1**

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#### Introduction

This unit is about the language and basic principles that are at the heart of customer service and the skills needed to communicate effectively with customers and colleagues. The learner needs to be able to use the right language within a chosen job role.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know customer service terms and language	1.1	Define key customer service terms and language
		1.2	Describe the connections between customer service, customer expectations and customer satisfaction
2	Know what contributes to good customer service in an organisation	2.1	Describe how company procedures contribute to good customer service
		2.2	Describe how good teamwork contributes to good customer service
		2.3	Describe the main points in a customer service process that influence customer satisfaction
3	Be able to work effectively with colleagues in a customer service team	3.1	Describe why friendliness and helpfulness are useful in customer service teamwork
		3.2	Describe the importance of not distracting colleagues when dealing with customers
		3.3	Identify what leads to effective teamwork
		3.4	Work effectively within a team when carrying out routine customer service tasks

## Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the job properly.

**For their chosen customer service role the learner needs to be able to:**

Define:

- The key customer service terms and language

Describe:

- The connections between customer service, customer expectations and customer satisfaction
- How company procedures contribute to good customer service
- How good teamwork contributes to good customer service
- The main points in a customer service process that influence customer satisfaction
- Why friendliness and helpfulness are useful in customer service teamwork
- The importance of not distracting colleagues when dealing with customers

Identify:

- What leads to effective teamwork

Demonstrate:

- How to work effectively within a team when carrying out routine customer service

## UNIT SPECIFICATIONS

### The customer service experience

Credit Value of Unit: 2

GLH of Unit: 20

Level of Unit: Level 1

#### Introduction

This unit is about understanding the needs of customers and being able to demonstrate a positive attitude when dealing with customers.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Know about the customer service experience	1.1	Describe customer service situations
		1.2	Describe steps in a customer service process
		1.3	Describe the feelings of being a customer at different stages of the customer service process
2	Know how customer satisfaction is achieved	2.1	Describe the link between customer expectations and customer satisfaction
		2.2	Describe service delivery that provides customer satisfaction
		2.3	Describe customer service that does not meet customer expectations and the reasons why
3	Be able to demonstrate a positive attitude when dealing with customers	3.1	Demonstrate willingness when dealing with customers
		3.2	Speak clearly to customers and put them at their ease in different situations
		3.3	Recognise customer feelings and establish a rapport with them
		3.4	Show respect to customers
		3.5	Show reliability to customers

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the role properly.

**For their chosen customer service job role the learner needs to be able to:**

Describe:

- A number of customer service situations
- The steps in a customer service process
- The feelings of a customer at the different stages of the process
- The link between customer expectations and customer satisfaction
- Service delivery that provides customer satisfaction

Demonstrate:

- How to speak clearly and show willingness when dealing with customers
- How to recognise customer feeling and put them at ease, establishing a rapport
- How to show respect and reliability to customers

## UNIT SPECIFICATIONS

### Work in a customer-friendly way

Credit Value of Unit: 2

GLH of Unit: 18

Level of Unit: Level 1

#### Introduction

This unit is about the learner being able to demonstrate that they can work in a polite and friendly manner with customers in a number of different situations.

Learning Outcomes		Assessment Criteria	
The learner will be able to		The learner can	
1	Be able to demonstrate a polite and willing approach to customers	1.1	Show good manners when dealing with customers
		1.2	Greet customers politely and confidently
		1.3	Deal with customers within an appropriate timescale
		1.4	Respond willingly to customer requests
		1.5	Work in a way that shows customers they are willing and enthusiastic
2	Be able to interact with customers in different situations	2.1	Recognise when a customer wants or needs attention
		2.2	Respond when a customer wants or needs attention
3	Be able to demonstrate consideration for customer	3.1	Describe what might impress or annoy customers when carrying out routine customer service tasks
		3.2	Carry out routine customer service tasks in a way that shows consideration to customers
		3.3	Focus on customers and avoid distractions
		3.4	Thank customers for their business or for information given

#### Indicative Content

The learner may already work in a customer service role or may choose a **specific job role** to understand and learn what is required in order to fulfil the job properly.

#### For their chosen customer service role the learner needs to be able to:

##### Demonstrate:

- How to greet customers politely and confidently
- Good manners throughout
- That they are willing and eager to assist the customer and respond in an appropriate timescale
- How to recognise and respond when a customer needs assistance
- How to carry out routine customer service tasks
- That they can stay focused on the customer and thank them for their custom or information

##### Describe:

- What might annoy or impress a customer when carrying out routine customer service tasks

## APPENDIX 1

### Summary Record of Achievement

#### Entry Level 3 and Level 1 Awards and Certificates in Introduction to Customer Service

Unit Title	Level	Credit Value	Date completed	Assessor Signature	Internal Verifier Signature (if sampled)
<b>Mandatory units</b>					
Legislation, regulation and procedures to follow in customer service	Entry 3	2			
Introduction to customer service	Entry 3	2			
Apply legislation, regulation and organisational procedures for customer service	Level 1	3			
Working in customer service	Level 1	2			
<b>Optional units</b>					
The importance of appearance and behaviour in customer service	Entry 3	2			
Understand how to deal with queries and requests	Entry 3	3			
Communicate customers' problems with others	Entry 3	2			
The customer service job role	Entry 3	2			
Handling telephone calls from customers	Entry 3	2			
Communicate effectively with customers	Entry 3	2			
Effective relationships with customers and colleagues	Entry 3	2			
Working in a customer focused way	Entry 3	2			

Create a good impression to customers	Level 1	2			
Deal with queries and requests	Level 1	3			
Record and communicate customer problems	Level 1	2			
Answer telephone calls from customers	Level 1	2			
Positive communication with customers	Level 1	2			
Contribute to effective customer service	Level 1	2			
The customer service experience	Level 1	2			
Work in a customer-friendly way	Level 1	2			

Learner Name \_\_\_\_\_

Level Claimed \_\_\_\_\_

Total Credit Value at Level being claimed \_\_\_\_\_

I confirm that the minimum number of credits at the appropriate level have been achieved in order for a claim for certification to be made. I can confirm that the credit has been achieved from the correct combination of mandatory and optional units as specified within the Rules of Combination.

Assessor Signature \_\_\_\_\_

Internal Verifier Signature (if sampled) \_\_\_\_\_

## APPENDIX 2

### Tracking Sheet

#### Legislation, regulation and procedures to follow in customer service

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State the procedures for a particular customer job				
1.2 State the limits of responsibility				
2.1 State organisational procedures for the security of property when delivering customer service				
2.2 State organisational procedures for security of information about customers when delivering customer service				
3.1 State the health and safety rules that relate to a customer service job				
3.2 State the health and safety risks to customers and colleagues				
4.1 List legislation and external regulations that impact on a customer job				
4.2 List things that should not be done in a customer service job because of regulation				
4.3 State your responsibilities for treating customers equally				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

Assessor Signature \_\_\_\_\_ Date \_\_\_\_\_

Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_



## Tracking Sheet

## Introduction to customer service

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Describe the differences between an external and an internal customer				
1.2 State how different services and products could relate to each other and assist in providing customer satisfaction				
1.3 Identify regularly used customer service terms				
2.1 Identify what is meant by customer expectations				
2.2 Identify what is meant by customer satisfaction				
2.3 State how customer satisfaction results from meeting customer expectations				
2.4 State the consequences if customer service does not meet customer expectations				
2.5 State why good customer service matters to organisations				
3.1 Identify situations when they are a customer				
3.2 Describe what matters to them when they are a customer				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

Assessor Signature \_\_\_\_\_ Date \_\_\_\_\_

Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

Tracking Sheet

**Apply legislation, regulation and organisational procedures for customer service**

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Describe the limits of own responsibility for a particular job in customer service				
1.2 Carry out steps in customer service procedures for a particular job				
2.1 Observe organisational procedures for the security of property when delivering customer service				
2.2 Observe organisational procedures for the security of information when delivering customer service				
3.1 Describe the health and safety rules that relate to delivering customer service				
3.2 Describe the main health and safety risks for customers and colleagues when delivering customer service				
4.1 Describe the key legislation and external regulations relating to customer service delivery				
4.2 Describe actions to avoid because of legislation and regulations relating to customer service				
4.3 Describe the importance of treating customers equally when delivering customer service				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

Assessor Signature \_\_\_\_\_ Date \_\_\_\_\_

Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Working in customer service

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State the service offer of the organisation				
1.2 Describe the role of a selected job holder in delivering the service offer				
2.1 Describe the information the job holder needs to meet customer service expectations				
2.2 Describe how the behaviour of somebody in a customer service job affects the customer experience				
3.1 Identify jobs delivering customer service				
3.2 Identify the customers for those jobs				
3.3 Describe what customers expect from somebody doing those jobs				
4.1 Identify jobs that may follow from experience in first step customer service				
4.2 Identify the customers for those jobs				
4.3 Describe what customers expect from somebody doing those jobs				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## The importance of appearance and behaviour in customer service

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State the appropriate dress in a particular customer service job				
1.2 State inappropriate dress in a particular customer service job				
2.1 Identify customer expectations of appearance				
2.2 Identify personal appearance that could cause negative customer reaction				
3.1 State the importance of making a good first impression on customers				
3.2 Describe how to greet customers politely and positively				
3.3 State how to recognise when a customer wants or needs attention				
3.4 State how to respond when a customer wants or needs attention				
3.5 Describe how to focus on customers and avoid distractions when dealing with them				
3.6 State the importance of thanking customers for their business or for information given				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## Understand how to deal with queries and requests

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 List the services or products a selected section or department offers				
1.2 List the key features of the services or products a selected section or department offers				
2.1 List the most frequently asked questions about a selected section or department's services or products				
2.2 State the preferred answers to the most frequently asked questions about a selected section or department's services or products				
3.1 Listen closely to questions from customers				
3.2 Identify when questions from customers require a specific response or action				
4.1 State how to check with customers that they have heard their questions correctly				
4.2 State the importance of keeping customers informed of actions on their queries or requests				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Communicate customers' problems with others

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 List the information to seek when asking a customer for details about a problem				
1.2 Describe how to check understanding of a problem with a customer				
2.1 Take notes about a customer problem				
2.2 Check with a customer that notes about the problem are correct				
3.1 State the importance of selecting the correct information to identify the customer and the problem				
3.2 Identify the details of a customer problem that should be passed to a colleague				
4.1 State the importance of passing full information about the customer problem to a colleague accurately and promptly				
4.2 State the importance of keeping a customer informed about what is being done about the problem				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## The customer service job role

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 List the information a person needs to do a customer service job				
1.2 List the parts of a job which impact directly on customer service				
1.3 Describe the key individual skills needed to do a customer service job				
1.4 Describe how the way somebody behaves in a job affects the customer service experience				
2.1 Describe a job that may be a first step in delivering customer service				
2.2 Identify who the customers are				
2.3 Describe what customers expect from somebody doing that job				
3.1 Describe a job that may follow from gaining experience in a first step customer service job				
3.2 Identify who the customers are				
3.3 Describe what customers expect from somebody doing that job				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## Handling telephone calls from customers

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State the importance of answering the phone promptly				
1.2 Identify appropriate and friendly greetings to use when answering customer telephone calls				
2.1 State the importance of identifying the customer's needs				
2.2 State how to confirm customer needs				
2.3 Describe how to pass on calls from customers when customer needs are outside their authority				
2.4 State the importance of closing the call, thanking customers for their business or for the information given				
3.1 State the types of communication problems that may occur				
3.2 Describe how to focus on the call and avoid distractions				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## Communicate effectively with customers

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State why it is important to speak clearly to customers				
1.2 State how to speak clearly to customers about services and products				
1.3 List the information to include when answering questions from customers about services or products				
2.1 State how to give customers their full attention when listening to them				
2.2 State why it is important to listen to customers				
3.1 Describe how to confirm with customers that details are correct				
3.2 State the importance of reacting quickly to what they have heard from customers				
3.3 List information they might hear from customers that should be passed to colleagues				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Effective relationships with customers and colleagues

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Identify methods of communication when dealing with customers				
1.2 Identify language to avoid because customers may consider it to be offensive				
1.3 Identify language to avoid because customers may consider it too familiar				
2.1 State why friendliness and helpfulness are useful in customer service teamwork				
2.2 State how to help colleagues when doing routine customer service tasks				
2.3 State what help could be reasonably expected from colleagues when carrying out routine customer service tasks				
2.4 State what help colleagues could reasonably expect to be given when carrying out routine customer service tasks				
3.1 State what is meant by positive body language				
3.2 State the importance of avoiding negative body language				
3.3 State why it is important to use eye contact and a smile when talking to customers and colleagues				
3.4 State why it is important to use and react to body language when dealing with customers and colleagues				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Working in a customer focused way

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 State the importance of being positive and polite when dealing with customers				
1.2 State the importance of dealing with customers in an appropriate timescale				
1.3 Identify what they can do to show the customer they are willing and enthusiastic				
1.4 State how to show customers reliability				
2.1 State the importance of being considerate to customers				
2.2 Identify what impresses customers				
2.3 Identify what may annoy customers				
2.4 State how to put customers at ease				
2.5 State how to show respect to customers				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Create a good impression to customers

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Describe appropriate dress requirements in different customer service jobs				
1.2 Identify inappropriate dress in different customer service jobs				
1.3 Dress in a way that meets customer expectations in a particular job				
2.1 State the importance of making a good first impression on customers				
2.2 Identify personal appearance that may cause a negative reaction from customers				
2.3 Present self in a way that makes a positive impression on customers				
3.1 Describe methods of communicating with customers				
3.2 Describe why offensive language should be avoided when dealing with customers				
3.3 Use appropriate methods of communication when dealing with customers				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Deal with queries and requests

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Describe the services and products of a selected section or department				
1.2 List the key features and benefits to customers of the services and products of a selected section or department				
2.1 Describe the features and benefits of services and products that most interest customers				
2.2 Identify questions that customers frequently ask about services and products and the preferred answers to those questions				
3.1 Listen closely to questions and responses from customers				
3.2 Clarify queries and requests from customers				
4.1 Deal with a query or request in a positive way				
4.2 Seek information or support if the query or request is outside their own knowledge or authority				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Record and communicate customer problems

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Question a customer to collect detailed information about a problem				
1.2 Check why the customer believes that their expectations are not being met				
2.1 Keep a record of details about a customer service problem				
2.2 Confirm the accuracy of the record of a customer problem with the customer				
3.1 Select information about the customer and the problem that is sufficient for a colleague to understand it				
3.2 Inform a colleague about the customer problem				
3.3 Give the customer information about the steps being taken to deal with the problem				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Answer telephone calls from customers

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Explain why an appropriate greeting is needed for customers				
1.2 Use the appropriate greeting when answering customer calls				
2.1 Use questions to clarify customer wishes and needs during telephone calls				
2.2 Deal with the customer's requests within the limits of own authority				
2.3 Pass on calls from customers to appropriate colleagues when customer needs are outside their own authority				
3.1 Exchange information with customers over the telephone				
3.2 Summarise information from customers to check they have heard requests correctly				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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Internal Verifier (if sampled) \_\_\_\_\_ Date \_\_\_\_\_

## Tracking Sheet

## Positive communication with customers

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Use questions to develop a customer conversation				
1.2 Describe how to listen actively to customers				
1.3 Listen actively to customers				
1.4 Close a conversation with a customer				
2.1 Exchange information with customers in a conversation				
2.2 Summarise information from customers to check they have heard requests correctly				
2.3 Pass information from customers to colleagues				
3.1 Identify types of body language that affect customers positively				
3.2 Identify types of body language that affect customers negatively				
3.3 Use positive body language when dealing with customers				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## Contribute to effective customer service

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Define key customer service terms and language				
1.2 Describe the connections between customer service, customer expectations and customer satisfaction				
2.1 Describe how company procedures contribute to good customer service				
2.2 Describe how good teamwork contributes to good customer service				
2.3 Describe the main points in a customer service process that influence customer satisfaction				
3.1 Describe why friendliness and helpfulness are useful in customer service teamwork				
3.2 Describe the importance of not distracting colleagues when dealing with customers				
3.3 Identify what leads to effective teamwork				
3.4 Work effectively within a team when carrying out routine customer service tasks				

The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## The customer service experience

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Describe customer service situations				
1.2 Describe steps in a customer service process				
1.3 Describe the feelings of being a customer at different stages of the customer service process				
2.1 Describe the link between customer expectations and customer satisfaction				
2.2 Describe service delivery that provides customer satisfaction				
2.3 Describe customer service that does not meet customer expectations and the reasons why				
3.1 Demonstrate willingness when dealing with customers				
3.2 Speak clearly to customers and put them at their ease in different situations				
3.3 Recognise customer feelings and establish a rapport with them				
3.4 Show respect to customers				
3.5 Show reliability to customers				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

Learner Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Tracking Sheet

## Work in a customer-friendly way

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Show good manners when dealing with customers				
1.2 Greet customers politely and confidently				
1.3 Deal with customers within an appropriate timescale				
1.4 Respond willingly to customer requests				
1.5 Work in a way that shows customers they are willing and enthusiastic				
2.1 Recognise when a customer wants or needs attention				
2.2 Respond when a customer wants or needs attention				
3.1 Describe what might impress or annoy customers when carrying out routine customer service tasks				
3.2 Carry out routine customer service tasks in a way that shows consideration to customers				
3.3 Focus on customers and avoid distractions				
3.4 Thank customers for their business or for information given				

**The above evidence has been assessed against the standards and has been judged for validity, authenticity, currency, reliability and sufficiency.**

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