



Ascentis Level 1 Certificate for
Introduction to Customer Service
Specification

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ABOUT ASCENTIS

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, England), Council for the Curriculum, Examinations and Assessment (CCEA, Northern Ireland) and Qualifications Wales

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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Apply legislation, regulation and organisational procedures for customer service	13
Working in customer service	15

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ASCENTIS INTRODUCTION TO CUSTOMER SERVICE

Introduction

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

There are several features of this qualification that makes it very appropriate for its 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 this qualification 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

This qualification is aimed at young people aged 14+ and adult learners who have an interest in a range of careers where customer service is important.

Regulation Codes

Qualification Accreditation Number: (Ofqual) Level 1 Certificate - 600/1684/X

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 which are appropriate to their learning environment.

Ascentis Level 1 Certificate for Introduction to Customer Service				
Minimum credits: 13				
Group A - Mandatory Units				
Credit (from Group A) Mandatory Units: 5				
Title	Level	Credit Value	GLH	Unit Reference
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				
Minimum credit (from Group B) Optional Units at Level 1: 2				
Minimum optional credit at Entry Level 3 or above: 6				
Answer telephone calls from customers	Level 1	2	18	T/601/6077
Communicate customers' problems with others	Entry 3	2	18	D/601/6056
Communicate effectively with customers	Entry 3	2	18	M/601/6062
Contribute to effective customer service	Level 1	2	20	F/601/6079
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
Digital communications for business	Level 1	2	20	D/618/3355
Effective relationships with customers and colleagues	Entry 3	2	20	A/601/6064
Handling telephone calls from customers	Entry 3	2	18	M/601/6059
Introduction to Customer Service	Entry 3	2	20	F/601/6065
Positive communication with customers	Level 1	2	20	A/601/6078
Record and communicate customer problems	Level 1	2	18	K/601/6075
The customer service experience	Level 1	2	20	T/601/6080
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
Working in a customer focused way	Entry 3	2	16	L/601/6067
Work in a customer-friendly way	Level 1	2	18	A/601/6081
Credits from equivalent units:				
Please contact the Ascentis office to request equivalences and ask to speak to a member of the Qualifications Development Team.				
Credits from exemptions:				
Please contact the Ascentis office to request exemptions and ask to speak to a member of the Qualifications Development Team				

Barred combinations				
Unit Title	Unit Reference		Unit Title	Unit 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
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
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.

Guided Learning Hours (GLH)

The recommended guided learning hours for Ascentis Level 1 Certificate for Introduction to Customer Service is 109.

Total Qualification Time (TQT)

The total qualification time for Level 1 Certificate for Introduction to Customer Service is 130.

Time Limit for the Process of Credit Accumulation and Exemptions

Credit accumulation is usually within the life span of the qualification. Exemptions may have been achieved previous to the qualification start date; each case will be considered separately.

Recommended Prior Knowledge, Attainment and/or Experience

No recommended prior learning is required.

Age Range of Qualification

This qualification is suitable for young people aged 14-19 and adult learners.

Opportunities for Progression

It is intended that this qualification 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.

Resources to Support the Delivery of the Qualification

Indicative content, including useful links, is provided for the mandatory units to support tutors with the delivery of these qualifications. Please refer to the Useful Links advice on Page 9.

Many Ascentis units include suggested content to support wider learning opportunities across three priority areas:

- Digital
- Well-being
- Sustainability.

They are not compulsory and do not form part of the assessment. They are suggestions for tutors who may wish to link the unit content into these areas to further support learner progression in education, training and work.

There are learner workbooks available for both mandatory units in the qualification. These are available to download through the Ascentis electronic portal.

Centre Recognition

This qualification 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.

Qualification Approval

If your centre is already a recognised centre, you will need to complete and submit a qualification approval form to deliver this qualification. Details of the qualification approval process are available from the Ascentis office (tel. 01524 845046) or from the website at 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. Late registration may result in a fee, refer to the latest version of the product catalogue.

Status in England, Wales and Northern Ireland

This qualification is available in England, Wales and Northern Ireland. They are only offered in English. If you wish to deliver them in any other nation, please contact development@ascentis.co.uk.

Reasonable Adjustments and Special Considerations

In the development of this qualification 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 login area of the Ascentis website 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*¹. Full details of this procedure, including how to make an application, are available from the login area of the Ascentis website www.ascentis.co.uk or through contacting the Ascentis office.

Useful Links

Web links and other resources featured in this specification are suggestions only to support the delivery of this qualification and should be implemented at the centre's discretion. The hyperlinks provided were live at the time this specification was last reviewed. Please kindly notify Ascentis if you find a link that is no longer active.

Please note: Ascentis is not responsible for the content of third-party websites and, whilst we check external links regularly, the owners of these sites may remove or amend these documents or web pages at any time.

¹ In Northern Ireland it is the CCEA General Conditions of Recognition and Qualifications Wales is the Standard Conditions of Recognition.

ASSESSMENT AND VERIFICATION ARRANGEMENTS

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 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.

The overall grading of this qualification is Pass or Fail.

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
- Audio 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.

Ascentis offer free refresher training in support of this role through an Ascentis Internal Quality Assurance course. The purpose of the course is to provide staff in centres with knowledge and understanding of Ascentis IQA processes and procedures, which will enable them to carry out their role more effectively. To book your place on a course or request further information, please contact the Ascentis Quality Assurance Team (qualityassurance@ascentis.co.uk).

Further information is available from the login section of the Ascentis website www.ascentis.co.uk.

External Verification

Recognised centres will be verified 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:

- 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 Quality Assurers will usually do this through discussion with the 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 the Ascentis website.

MANDATORY UNITS

UNIT SPECIFICATIONS

Unit Title: **Apply legislation, regulation and organisational procedures for customer service**

Unit Reference Number: **R/601/6071**

Credit Value of Unit: 3

GLH of Unit: 24

Level of Unit: Level 1

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

Please be aware that the indicative content supplied below is a suggested guide only.

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 fairly and with respect

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 etc. Act 1974
- COSHH
- Consumer Rights Act 2015
- Consumer Protection Act 1987
- Trades Description Act
- Equality Act 2010
- RIDDOR
- The Data Protection Act 2018

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being	Sustainability
Learners could: • Use appropriate online sources to locate information about different policies and procedures, e.g., GDPR, etc. • Describe organisational procedures relating to use of technology, e.g., cyber security and awareness of phishing.	Learners could: • Think about health and safety guidance that can impact their own personal health and well-being e.g., tidy workspaces, access to clean facilities, etc. • Think about how it might feel to experience discrimination at work, and how it impacts a person's well-being.	Learners could: • Consider how an organisation might have sustainability policies in place, and how these are important to customers. Examples could include awareness of energy saving in the workplace or go paperless initiatives. • Find examples of sustainability policies and recommended practice in a range of settings.

UNIT SPECIFICATIONS

Unit Title: **Working in customer service**

Unit Reference Number: **M/601/6076**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being	Sustainability
Learners could: • Consider the impact that technology has had on customer expectations (e.g., immediate responses through webchat, to easily access services and information online).	Learners could: • Consider how helping customers can bring a positive sense of worth and well-being. • Identify the feelings that they might relate to meeting customer expectations and indicate some behaviours that promote customers' and their own wellbeing, e.g., relaxing the body and remaining calm.	Learners could: • Describe customer expectations of sustainability in the workplace, e.g., clearly labelled designated recycling facilities, digital options to reduce paper (emailed receipts), use of eco-friendly packaging.

OPTIONAL UNITS

UNIT SPECIFICATIONS

Unit Title: **Answer telephone calls from customers**

Unit Reference Number: **T/601/6077**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being
Learners could: • Explain the physical steps needed to forward a call to another member of staff. • Consider the advantages and disadvantages of using automated phone systems. • Consider a situation when a colleague is not available to immediately have a call passed to them and practise typing customer feedback that could then be shared with a colleague through email.	Learners could: • Consider the importance of building on social interactions and practising active listening. • Discuss the importance of time management on how it makes them and the customer feel, e.g., a customer being on hold for a long time or taking the time to fully understand a problem by asking appropriate questions.

UNIT SPECIFICATIONS

Unit Title: **Communicate customers' problems with others**

Unit Reference Number: **D/601/6056**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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
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Suggested opportunities to develop wider awareness, learning and skills	
Digital	Well-being
Learners could: • Explain the benefits of using a Customer Relationship Management (CRM) system. • Identify how to forward an email to a colleague and how to phrase a holding email. • Consider the impact of inputting correct customer information into the system whilst on the phone with them.	Learners could: • Reflect on the personal skills they might develop working with others (e.g., listening, cooperation, confidence). • Reflect on the personal skills they can develop when dealing with problems (e.g., resilience, patience, further opportunities for learning).

UNIT SPECIFICATIONS

Unit Title: **Communicate effectively with customers**

Unit Reference Number: **M/601/6062**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Contribute to effective customer service**

Unit Reference Number: **F/601/6079**

Credit Value of Unit: 2

GLH of Unit: 20

Level of Unit: Level 1

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being
Learners could: • Consider the importance of incorporating customer service language into emails and web chats. • Identify online etiquette when communicating with team members on collaborative platforms, e.g., Microsoft Teams.	Learners could: • Consider how building connections and working within a team can be very beneficial to positive mental health. • Reflect on their connections and interactions with others and understand how being part of a team can lead to a sense of belonging.

UNIT SPECIFICATIONS

Unit Title: **Create a good impression to customers**

Unit Reference Number: **R/601/6068**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being
Learners could: • Consider the use of technology in different methods of communication and how to communicate appropriately when using these tools, e.g., use of emojis. • Discuss the impact of online meeting platforms such as Microsoft Teams and Zoom on expectations of appearance. Identify appropriate use of some of the features on these platforms, e.g., use of backgrounds and avatars. • Identify the ways in which technology can be a distraction, e.g., use of mobile phones in the workplace.	Learners could: • Describe the feelings of confidence and positive well-being gained from maintaining their personal appearance and hygiene.

UNIT SPECIFICATIONS

Unit Title: **Deal with queries and requests**

Unit Reference Number: **H/601/6074**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being	Sustainability
Learners could: • Consider how a customer may be navigating a website and explain the issues they may face which lead them to contact customer service. • Demonstrate how to include hyperlinks in emails, e.g., to access further information, to access terms and conditions or to activate a promotion.	Learners could: • Consider how helping customers can bring a positive sense of worth and well-being. • Think about the Five Ways to Well-being and reflect on how the process of gaining new skills and knowledge links to 'Keep learning', encouraging them to gain self-confidence and a sense of purpose.	Learners could: • Consider what makes a product sustainable and customers' interest in this. • Find examples of how companies market their sustainability commitments. • Consider the problems with 'green washing'.

UNIT SPECIFICATIONS

Unit Title: **Digital communications for business**

Unit Reference Number: **D/618/3355**

Credit Value of Unit: 2

GLH of Unit: 20

Level of Unit: Level 1

This unit aims to promote the use of communication technologies required for business purposes. Learners will learn how to effectively create and organise contact information for the sending and receiving of digital communications. They will also learn how to organise and store communications.

Learning Outcomes	Assessment Criteria
The learner will be able to:	The learner can:
1. Use digital software tools and techniques to compose and send messages	1.1 Use software tools to compose and format digital communication messages, including attachments
	1.2 Manage message size, reducing where necessary
	1.3 Send digital messages to individuals and groups
	1.4 Maintain own safety and respect others when using digital communications
	1.5 Use an address book to organise contact information
2. Manage incoming digital messages effectively	2.1 Follow guidelines and procedures for using digital business communications
	2.2 Read and respond to digital messages appropriately
	2.3 Organise and store email messages effectively
	2.4 Respond appropriately to digital communication problems

Indicative Content

Please be aware that the indicative content supplied below is a suggested guide only.

An increasing amount of customer service roles require competent digital skills in order to effectively communicate with customers and colleagues.

Learners may create digital communications relevant to a given or chosen job role.

The learner should be able to demonstrate:

- 1.1 Use of several software tools, which may include: email, chat, instant messaging, chat rooms, video conferencing chat, social networks, social media. Format: text (font style, size, colour), format paragraphs (alignment, bullets, numbered list), spell check, priority, draft, create and use email signatures, hyperlinks. Attachments: word documents, pdfs, images.
- 1.2 Management of attachments, which may include zip attachments, awareness of mailbox restrictions, and knowledge of methods to reduce size
- 1.3 How to use the key features of an email: To, CC, BCC, from, subject, reply, reply to all, forward, set message flags for priority, send to all
- 1.4 Avoidance of inappropriate disclosure of personal information, avoidance of misuse of images, use of appropriate language, respect for confidentiality, awareness of GDPR, use of strong passwords, avoidance of malware, viruses and spyware (awareness of issues caused by phishing)
- 1.5 How to add, edit and delete contacts, use contacts and distribution lists, sort, and display selected fields
- 2.1 How to follow guidelines set by an employer or organisation, which may include guidance on security, copyright, netiquette, password protection, signatures, house styles
- 2.2 Decisions on priorities, gathering information needed to respond, decisions regarding when and who to copy in, opening attachments, saving attachments
- 2.3 How to organise and store emails in using a combination of the following: inbox, folders, sub-folders, flagged messages, deletion of unwanted messages, removal of deleted messages, restoration of deleted messages, address lists, retention rules, archive folders, search for email by sender, subject or content, sort messages
- 2.4 Appropriate responses to scenario-based communication problems. Encountered issues could be due to message size, number of attachments, messages from unknown senders (spam, phishing, junk, chain mails), viruses, malware, spyware, messages intended to cause problems

UNIT SPECIFICATIONS

Unit Title: **Effective relationships with customers and colleagues**

Unit Reference Number: **A/601/6064**

Credit Value of Unit: 2

GLH of Unit: 20

Level of Unit: Entry 3

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Handling telephone calls from customers**

Unit Reference Number: **M/601/6059**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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
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Suggested opportunities to develop wider awareness, learning and skills	
Digital	Well-being
Learners could: • Explain the physical steps needed to forward a call to another member of staff. • Consider the advantages and disadvantages of using automated phone systems.	Learners could: • Consider the importance of building on social interactions and practising active listening. • Discuss the importance of time management on how it makes them and the customer feel, e.g., a customer being on hold for a long time or taking the time to fully understand a problem by asking appropriate questions.

UNIT SPECIFICATIONS

Unit Title: **Introduction to customer service**

Unit Reference Number: **F/601/6065**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Positive communication with customers**

Unit Reference Number: **A/601/6078**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Record and communicate customer problems**

Unit Reference Number: **K/601/6075**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills	
Digital	Well-being
Learners could: • Explain the benefits of using a Customer Relationship Management (CRM) system. • Demonstrate how to forward an email to a colleague and how to phrase a holding email.	Learners could: • Reflect on the personal skills they might develop working with others (e.g., listening, cooperation, confidence). • Reflect on the personal skills they can develop when dealing with problems (e.g., resilience, patience, further opportunities for learning).

UNIT SPECIFICATIONS

Unit Title: **The customer service experience**

Unit Reference Number: **T/601/6080**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Suggested opportunities to develop wider awareness, learning and skills

Digital	Well-being	Sustainability
Learners could: • Describe how technology has changed the customer service process. • Identify the steps in a customer service process that may require digital skills, e.g., using a CRM system to record, save and share customer information, or emailing a link for a feedback form to a customer (to measure customer satisfaction).	Learners could: • Discuss the importance of communication skills in supporting their own and others' well-being. • Understand the role of empathy in relating to customers and how practising this can help with managing emotionally challenging or stressful situations.	Learners could: • Describe what common customer expectations are with regards to sustainability (e.g., respect for the environment, offering sustainable alternatives to services / products).

UNIT SPECIFICATIONS

Unit Title: **The importance of appearance and behaviour in customer service**

Unit Reference Number: **A/601/6047**

Credit Value of Unit: 2

GLH of Unit: 15

Level of Unit: Entry 3

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.

Learning Outcomes	Assessment Criteria
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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Understand how to deal with queries and requests**

Unit Reference Number: **R/601/6054**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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.

Suggested opportunities to develop wider awareness, learning and skills		
Digital	Well-being	Sustainability
Learners could: - Consider how a customer may be navigating a website and explain the issues they may face which lead them to contact customer service. - Demonstrate how to include hyperlinks in emails, e.g., to access further information, to access terms and conditions or to activate a promotion.	Learners could: Consider how helping a customer can bring a sense of achievement and positive self-worth in their role.	Learners could: - Consider what makes a product sustainable and customers' interest in this. - Find examples of how companies market their sustainability commitments. - Consider the problems with 'green washing'.

UNIT SPECIFICATIONS

Unit Title: **Working in a customer focused way**

Unit Reference Number: **L/601/6067**

Credit Value of Unit: 2

GLH of Unit: 16

Level of Unit: Entry 3

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Unit Title: **Work in a customer-friendly way**

Unit Reference Number: **A/601/6081**

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

Please be aware that the indicative content supplied below is a suggested guide only.

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

Level 1 Certificate in Introduction to Customer Service

Unit Title	Level	Credit Value	Date completed	Assessor Signature	Internal Verifier Signature (if sampled)
Mandatory units					
Apply legislation, regulation and organisational procedures for customer service	Level 1	3			
Working in customer service	Level 1	2			
Optional units					
Answer telephone calls from customers	Level 1	2			
Communicate customers' problems with others	Entry 3	2			
Communicate effectively with customers	Entry 3	2			
Contribute to effective customer service	Level 1	2			
Create a good impression to customers	Level 1	2			
Deal with queries and requests	Level 1	3			
Digital communications for business	Level 1	2			
Effective relationships with customers and colleagues	Entry 3	2			
Handling telephone calls from customers	Entry 3	2			
Introduction to customer service	Entry 3	2			

Positive communication with customers	Level 1	2			
Record and communicate customer problems	Level 1	2			
The customer service experience	Level 1	2			
The importance of appearance and behaviour in customer service	Entry 3	2			
Understand how to deal with queries and requests	Entry 3	3			
Work in a customer-friendly way	Level 1	2			
Working in a customer focused way	Entry 3	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) _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **Digital communications for business**

Criteria	Assessment Method	Evidence Details	Portfolio Reference	Completion Date
1.1 Use software tools to compose and format digital communication messages, including attachments				
1.2 Manage message size, reducing where necessary				
1.3 Send digital messages to individuals and groups				
1.4 Maintain own safety and respect others when using digital communications				
1.5 Use an address book to organise contact information				
2.1 Follow guidelines and procedures for using digital business communications				
2.2 Read and respond to digital messages appropriately				
2.3 Organise and store email messages effectively				
2.4 Respond appropriately to digital communication problems				

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

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

APPENDIX 2

Tracking Sheet

Unit Title: **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

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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.

Learner Signature _____ Date _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____

Tracking Sheet

Unit Title: **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 _____

Assessor Signature _____ Date _____

Internal Verifier (if sampled) _____ Date _____