



Qualification  
Guidance

# Active IQ Level 2 Certificate in Customer Service

Qualification  
Accreditation Number:  
**603/2800/9**  
Version AIQ005188

**Active iQ**

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# Active IQ Level 2 Certificate in Customer Service

## Qualification accreditation number: 603/2800/9

### Introduction

The Active IQ Level 2 Certificate in Customer Service is at Level 2 on the Regulated Qualifications Framework (RQF).

<b>Guided learning hours:</b>	200	<b>Total qualification time:</b>	260
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### Entry requirements:

- There are no specific entry requirements.
- There is an element of communication (discussing, presenting, reading and writing) involved and learners should have basic skills in communication pitched at Level 2.

## Qualification outline

### Target learners:

- Learners aged 16+.
- Learners enrolled on the Customer Service Practitioner apprenticeship standard
- Learners considering a career in customer service.

### Purpose

The purpose of this qualification is to provide learners with the underpinning knowledge of customer service, the legislation relating to the customer environment and the relationship between customer service and brand. Learners are given the opportunity to develop their knowledge and skills in delivering an exceptional customer experience including communication skills, making a good impression, dealing with customers in a variety of situations and being able to resolve customer service problems.

### Progression

This qualification provides progression onto:

- Customer Service Practitioner apprenticeship.
- Active IQ Level 2 Diploma in Customer Service.
- Active IQ Level 3 Diploma in Customer Service.
- Sector-specific qualifications.

### Links to National Occupational Standards

The qualification is underpinned by the overarching standards for:

- Customer Service.

# Occupational competence statements for tutoring, assessing and quality assurance

**This section outlines the requirements for tutoring, assessing and internally verifying Active IQ qualifications.**

## **Required criteria**

All tutors, assessors and internal verifiers must:

- Possess a discipline-specific qualification equivalent to the qualification being taught.
- Have relevant industry experience.
- Demonstrate active involvement in a process of industry-relevant continuing professional development during the last two years (this may be discipline/context-specific or relevant to tutoring assessing or quality assurance).

## **Tutors and assessors**

Tutors must hold, or be working towards, a teaching qualification.

The following are acceptable:

- Level 3 Award in Education and Training.
- Level 4 Certificate in Education and Training.
- Level 5 Diploma in Education and Training.
- Certificate in Education.
- Qualified Teacher Status.

## **Assessors**

Assessors must hold, or be working towards, any of the following:

- Level 3 Award in Understanding the Principles and Practices of Assessment.
- Level 3 Award in Assessing Vocationally Related Achievement.
- Level 3 Award in Assessing Competence in the Work Environment.
- Level 3 Certificate in Assessing Vocational Achievement.
- A1 (previously D32, D33).

## **Internal verifiers**

Internal verifiers must hold or be working towards any of the following:

- Level 4 Award in Understanding the Internal Quality Assurance of Assessment Processes and Practice.
- Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice.
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice.
- V1 (previously D34).

All new assessors and quality assurance staff must be given a clear action plan for achieving the appropriate qualification(s) and should be countersigned by an appropriately qualified individual until the qualification(s) are achieved.

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### Qualification structure

Learners must complete the three mandatory units.

#### Mandatory units

	Unit	Unit accreditation number	Level	GLH	TQT
1	Principles of customer service	T/616/7789	2	70	90
2	Delivering an exceptional customer experience	K/616/7790	2	80	105
3	Resolve customer service problems	M/616/7791	2	50	65

<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
1. Understand the concept of customer service	1.1 Explain what is meant by 'customer service' 1.2 Explain why customer service is important to an organisation 1.3 Explain the importance of balancing promises made to customers with the needs of an organisation 1.4 Explain the differences between an internal customer and an external customer 1.5 Describe a typical customer in own area of responsibility 1.6 Give examples of what is meant by a positive customer experience 1.7 Describe what is meant by a negative customer experience 1.8 Identify the benefits of delivering good customer service 1.9 Identify the disadvantages of poor customer service
2. Understand legislation relating to the customer environment	2.1 Identify the relevant equalities legislation relating to customers 2.2 Identify the responsibilities of the employee under the Health and Safety at Work Act that relate to customer service 2.3 Identify the responsibilities of the employer under the Health and Safety at Work Act that relate to customer service 2.4 Identify the main principles of the Data Protection Act 2.5 Describe why it is important to respect customer and organisation confidentiality
3. Understand the relationship between customer service and a brand	3.1 Explain the importance of a brand to an organisation 3.2 Explain how a brand affects an organisation's customer service offer 3.3 Identify their own role in ensuring that a brand promise is delivered 3.4 Explain the relationship between customers' needs and expectations and customer satisfaction
<b>Assessment</b>	Worksheet

<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
<p>1. Understand the skills and behaviours needed to deliver exceptional customer service</p>	<p>1.1 Describe the common characteristics of people/ individuals who provide exceptional customer service</p> <p>1.2 Describe the features of self-presentation that will make a positive impression on customers</p> <p>1.3 Describe an appropriate attitude when dealing with customers</p> <p>1.4 Describe how to carry out routine customer service tasks in a way that shows consideration for customers</p> <p>1.5 Explain the meaning of professionalism within customer service</p> <p>1.6 Explain the importance of effective teamwork for the delivery of excellent customer service</p> <p>1.7 Describe the team-working skills required to deliver an excellent customer experience</p>
<p>2. Understand how to communicate clearly and effectively with customers</p>	<p>2.1 Identify different methods of communication, to include verbal and non-verbal methods</p> <p>2.2 Identify positive body language</p> <p>2.3 Identify negative body language</p> <p>2.4 Give examples of when it is necessary to take the initiative in approaching customers</p> <p>2.5 Describe different methods of effective and efficient communication in a range of situations, to include:</p> <ul style="list-style-type: none"> <li>• face-to-face</li> <li>• when making outgoing telephone calls</li> <li>• when answering incoming telephone calls</li> <li>• in writing (by email)</li> </ul> <p>2.6 Describe the communication approach that will make a positive impression on customers, to include:</p> <ul style="list-style-type: none"> <li>• enthusiasm</li> <li>• listening</li> <li>• patience</li> <li>• adaptability</li> <li>• establishing trust</li> </ul> <p>2.7 Explain why a consistent, positive attitude and approach to customers are vital to an organisation</p>

<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
3. Understand how to interact with customers in different situations	3.1 Identify the types of need and difficulty that customers may have that they require assistance with 3.2 Describe how to respond to different customer needs and difficulties 3.3 Identify the personal qualities required to deal with customer problems 3.4 Describe how to communicate with dissatisfied customers 3.5 Describe the skills required to deal with potentially volatile or unpleasant situations 3.6 Identify responses and actions that may make problems worse 3.7 Describe how to adapt your communication style, attitude and response to meet individual customer needs 3.8 Describe how to inform customers when promises cannot be kept as a result of unforeseen circumstances 3.9 Explain how to refer problems on to a senior colleague when they are not able to resolve a customer issue
4. Understand an organisation's product offer	4.1 Describe the features and benefits of an organisation's products and/or services 4.2 Explain the importance of keeping product/service knowledge up to date 4.3 Explain how to match products and/or services to customer needs 4.4 Describe techniques to promote additional products and/or services 4.5 Describe organisational processes for ordering products and/or services 4.6 Explain the importance of delivering post-sale service



<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
5. Be able to deliver exceptional customer service	5.1 Maintain organisational standards of presentation and behaviour when providing customer service 5.2 Recognise and respond when a customer wants or needs attention 5.3 Greet customers politely and positively 5.4 Demonstrate types of behaviour that make a positive impression 5.5 Speak to customers clearly and put them at their ease 5.6 Recognise how customers are feeling 5.7 Establish a rapport with customers 5.8 Demonstrate to customers that you are positive and enthusiastic at all times 5.9 Focus on your customers and ignore distractions 5.10 Show customers respect at all times and in all circumstances 5.11 Adapt own behaviour to meet customers' needs or expectations 5.12 Approach and initiate conversation with a customer that is not actively seeking attention 5.13 Adhere to organisational policies and procedures, and legal and ethical requirements when providing customer service
6. Be able to promote additional products and/or services to customers	6.1 Match a product or service to meet customers' needs 6.2 Explain to the customer the key features and benefits of the product or service 6.3 Use techniques to promote additional products or services 6.4 Explain the aftersales service to the customer
<b>Assessment</b>	Worksheet / Assignment Observation (real or simulated)

<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
<p>1. Understand how to deal with customer complaints and problems</p>	<p>1.1 Describe how to apply problem-solving theories to resolve a customer service issue</p> <p>1.2 Describe typical customer problems</p> <p>1.3 Identify the differences between assertive, aggressive, manipulative and passive behaviour</p> <p>1.4 Identify how own behaviour might affect the behaviour of others</p> <p>1.5 Identify the types of customer behaviour that may be challenging to deal with personally</p> <p>1.6 Identify ways to deal with customer behaviour that may be personally challenging</p> <p>1.7 Describe how to reassure customers while their problems are being solved</p>
<p>2. Understand when to pass information on to a senior colleague</p>	<p>2.1 Explain when it may be appropriate to pass on the complaint to a more senior member of staff</p> <p>2.2 Explain why it is important for a member of staff to get feedback from the customer and follow up any remaining issues</p> <p>2.3 Explain the importance of giving feedback to other colleagues involved, which will help the organisation to avoid future complaints</p> <p>2.4 Explain the importance of keeping clear records of the way a problem or complaint has been handled</p> <p>2.5 Describe an organisation's complaint or problem-solving procedure</p>

<b>Learning outcomes</b> <b>The learner will:</b>	<b>Assessment criteria</b> <b>The learner can:</b>
3. Be able to deal with customer complaints and problems	3.1 Summarise the details of the complaint or problem accurately and to customer satisfaction 3.2 Investigate the facts of the complaint in order to establish how it should be dealt with 3.3 Identify a range of solutions 3.4 Identify the benefits of different solutions for the customer and the organisation 3.5 Identify the advantages and disadvantages of different solutions for the customer and the organisation 3.6 Report the findings of your investigation to the customer and offer your chosen solution 3.7 Check that the solution is acceptable to the customer 3.8 Check that the customer is satisfied with the outcome of the customer service they have received 3.9 Record the outcome of the complaint or problem according to the organisation's procedures 3.10 Contribute to continuous service improvement
<b>Assessment</b>	Observation (real or simulated)

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