



Learner
Achievement
Portfolio

Level 2 Diploma in Customer Service – Group A

Qualification
Accreditation Number:
601/3544/X
Version AIQ004413

Active iQ

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Active IQ Level 2 Diploma in Customer Service

Qualification Accreditation Number: 601/3544/X

Personal details

Learner's name:

Workplace:

Workplace address:

Workplace telephone number:

Assessor's name:

Assessor's telephone number:

Assessor's email:

Introduction

Welcome to the **Active IQ Level 2 Diploma in Customer Service**

This document is designed to assist you in gathering evidence to prove your competence against the standards in each of your chosen units. Your work-based Assessor will provide you with guidance and support and help you decide on the best types of evidence to produce to prove competence.

When you start the qualification, your work-based assessor will usually help you to:

- Identify what you can do already
- Agree on the standard and level you are aiming for
- Analyse what you need to learn
- Choose and agree on activities that allow you to learn what you need

Assessment is normally through on-the-job observation and questioning. You will produce evidence to prove you have the competence to meet the qualification's standards. Your assessor will sign off units when they believe you are ready. The assessor will test your knowledge, understanding and work-based performance to make sure you can demonstrate competence in the workplace.

When planning assessments assessors will use a range of methods appropriate to you and required by the awarding body to assess you against the standards. The various methods of assessment that can be used are:

- Direct observation of you in the workplace
- Professional discussion
- Questioning
- Examination of workplace products you have produced
- Witness testimony
- Simulation (where allowed)
- DVD / Audio

Your assessor will explain all of these different methods to you.

You will compare your performance with the standards as you learn. You will look at what you have achieved, how much you still need to do and how you should go about it until you are assessed as competent for a unit. The qualification is suited to those who already have skills and want to develop them.

Active IQ Level 2 Diploma in Customer Service

You must complete a minimum of 45 credits.

You must complete all five units (19 credits) from mandatory Group A, a minimum of 3 credits from optional Group B, and a minimum of 16 credits from optional Group C. You may take a maximum of 7 credits from optional group D.

Unit		Accreditation number	Level	Credit
Mandatory units (Group A)				
Successful achievement of all five mandatory units must be achieved for the full qualification.				
1.	Deliver customer service	A/506/2130	2	5
2.	Understand customers	F/506/2131	2	2
3.	Principles of customer service	J/506/2132	2	4
4.	Understand employer organisations	A/506/1964	2	4
5.	Manage personal performance and development	L/506/1788	2	4
Optional units (Group B)				
You must take a minimum of 3 credits from optional group B.				
6.	Communicate verbally with customers	D/506/2119	2	3
7.	Communicate with customers in writing	T/506/2126	2	3
Optional units (Group C)				
You must take a minimum of 16 credits from optional group C.				
8	Deal with incoming telephone calls from customers	H/506/2154	2	3
9	Make telephone calls to customers	K/506/2155	2	3
10	Promote additional products and/or services to customers	L/506/2133	2	2
11	Process information about customers	R/506/2134	2	3
12	Exceed customer expectations	Y/506/2135	2	3
13	Deliver customer service whilst working on customers' premises	T/506/2143	2	4
14	Carry out customer service handovers	T/506/2157	2	3
15	Resolve customer service problems	A/506/2158	2	5
16	Deliver customer service to challenging customers	F/506/2159	2	3
17	Develop customer relationships	Y/506/2149	2	3
18	Support customer service improvements	T/506/2160	2	3
19	Support customers through real-time online customer service	A/506/2161	2	3
20	Use social media to deliver customer service	J/506/2163	2	3
21	Resolve customers' complaints	R/506/2151	3	4
22	Gather, analyse and interpret customer feedback	D/506/2170	3	5

23	Support customers using self-service equipment	H/506/2977	2	3
24	Provide post-transaction customer service	K/506/2978	2	5
Optional units (Group D)				
You may take a maximum of 7 credits from optional group D.				
25	Health and safety procedures in the workplace	T/505/4673	2	2
26	Manage diary systems	L/506/1807	2	2
27	Provide reception services	H/506/1814	2	3
28	Contribute to the organisation of an event	L/506/1869	2	3
29	Buddy a colleague to develop their skills	M/506/1895	2	3
30	Employee rights and responsibilities	L/506/1905	2	2
31	Develop working relationships with colleagues	R/506/1789	2	3
32	Principles of equality and diversity in the workplace	J/506/1806	2	2
33	Processing sales orders	M/502/8587	2	2
34	Meeting customers' after sales needs	R/502/8601	2	3
35	Handling objections and closing sales	M/502/8606	2	3
36	Deal with incidents through a contact centre	K/503/0421	2	7
37	Carry out direct sales activities in a contact centre	L/503/0394	2	5
38	Negotiate in a business environment	H/506/1912	3	4
39	Bespoke software	F/502/4396	2	3

Witness/Assessor Status List

Please ensure anybody who has made an assessment decision or provided a witness testimony within your portfolio has completed the witness/ assessor list

Witness name and address	Status of Witness (See key below)	Relationship to learner	Signature

Witness Status Key:

1. Qualified Assessor, occupationally competent and familiar with standards
2. Qualified Assessor, not occupationally competent or familiar with standards
3. Occupationally competent, not an assessor (eg line manager)
4. Not occupationally competent, familiar with learner (eg customer)

Record of Achievement

Unit name	Date Completed	Assessor Signature	IV Signature (if sampled)	Date	EV Signature (if sampled)	Date
Mandatory						
Optional Units						

Master Evidence Index

Evidence Number	Description
1.	
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Mandatory Group A

Unit 1

Title	Deliver customer service		
Level	2		
Credit	5		
Unit accreditation no.	A/506/2130		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand customer service delivery	<p>1.1 Explain the relationship between customers' needs and expectations and customer satisfaction</p> <p>1.2 Describe the features and benefits of an organisation's products and/or services</p> <p>1.3 Explain the importance of treating customers as individuals</p> <p>1.4 Explain the importance of balancing promises made to customers with the needs of an organisation</p> <p>1.5 Explain when and to whom to escalate problems</p> <p>1.6 Describe methods of measuring their own effectiveness in the delivery of customer service</p>		
2. Understand the relationship between customer service and a brand	<p>2.1 Explain the importance of a brand to an organisation</p> <p>2.2 Explain how a brand affects an organisation's customer service offer</p> <p>2.3 Explain the importance of using customer service language that supports a brand promise</p> <p>2.4 Identify their own role in ensuring that a brand promise is delivered</p>		

<p>3. Be able to prepare to deal with customers</p>	<p>3.1 Keep up to date with an organisation's products and/or services</p> <p>3.2 Prepare resources that are necessary to deal with customers before starting work</p>	<p>4. Be able to provide customer service</p>	<p>4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>4.2 Adapt their own behaviour to meet customers' needs or expectations</p> <p>4.3 Respond to customers' requests in line with organisational guidelines</p> <p>4.4 Inform customers of the progress of their requests</p> <p>4.5 Confirm that customers' expectations have been met in line with the service offer</p>	<p>5. Be able to support improvements to customer service delivery</p>	<p>4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service</p> <p>5.1 Identify ways that customer service could be improved for an organisation and individuals</p> <p>5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery</p>	<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>			
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Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 2

Understand customers					
2					
2					
F/506/2131					
Assessment Criteria The learner can:		▼		Initial	Evidence Reference
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers				WORKSHEET
	1.2 Explain how cultural factors can affect customers' expectations				
	1.3 Describe the characteristics of challenging customers				
	1.4 Explain how to identify dissatisfied customers				
	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty				
2. Understand the value of customers and their loyalty	2.2 Explain the relationship between customer satisfaction and organisational performance				
	2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services				
	2.4 Explain the potential consequences of customers' dissatisfaction				
	2.5 Describe different methods of attracting customers and retaining their loyalty				
	Evidence Requirements This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 3

Title	Principles of customer service		
Level	2		
Credit	4		
Unit accreditation no.	J/506/2132		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
<p>1. Understand customer service</p> <p>2. Understand how legal and ethical requirements relate to customer service</p>	1.1 Explain the purpose and scope of customer service		WORKSHEET
	1.2 Define the term “service offer”		
	1.3 Explain the value of a “service offer” to an organisation		
	1.4 Explain the importance of delivering consistently high quality customer service		
	1.5 Explain the importance of keeping up to date with knowledge of competitors’ activities		
	1.6 Explain barriers to providing effective customer service		
	1.7 Describe the features of effective follow-up service		
	2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service		
	2.2 Describe how health, safety and environmental legislation affects customer service delivery		
	2.3 Explain how ethical considerations affect customer service		
	2.4 Explain how equality legislation affects customer service		
	2.5 Describe how legislation affects the use and storage of customer information		

		WORKSHEET			
3. Understand how to deliver effective customer service	3.1 Explain the difference between customers' wants, needs and their expectations				
	3.2 Explain how to identify customers' needs and expectations				
	3.3 Explain the importance of managing customers' expectations				
	3.4 Explain how to behave in a way that meets customers' expectations				
	3.5 Describe techniques that can be used to put customers at ease and gain their trust				
	3.6 Explain the importance of following up actions and keeping promises when delivering customer service				
4. Understand the management of customer service information	4.1 Explain how customer service information can be used				
	4.2 Explain the importance of systems to manage customer service information				
	4.3 Explain the uses of systems to manage customer service information				
	4.4 Identify the features of an effective customer complaints process				
	4.5 Describe the uses of a customer complaints process				
Evidence Requirements This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 4

Title	Understand employer organisations		
Level	2		
Credit	4		
Unit accreditation no.	A/506/1964		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand organisational structures	1.1 Explain the differences between the private sector, public sector and voluntary sector		WORKSHEET
	1.2 Explain the functions of different organisational structures		
	1.3 Describe the features of different types of legal structures for organisations		
2. Understand the organisational environment	2.1 Describe the internal and external influences on organisations		
	2.2 Explain the use of different models of analysis in understanding the organisational environment		
	2.3 Explain why change in the business environment is important		
Evidence Requirements			
This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 5

Title	Manage personal performance and development		
Level	2		
Credit	4		
Unit accreditation no.	L/506/1788		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to manage personal performance	<p>1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager</p> <p>1.2 Agree criteria for measuring progress and achievement with line manager</p> <p>1.3 Complete tasks to agreed timescales and quality standards</p> <p>1.4 Report problems beyond their own level of competence and authority to the appropriate person</p> <p>1.5 Take action needed to resolve any problems with personal performance</p>		
2. Be able to manage their own time and workload	<p>2.1 Plan and manage workloads and priorities using time management tools and techniques</p> <p>2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives</p> <p>2.3 Explain the benefits of achieving an acceptable “work-life balance”</p>		

<p>3. Be able to identify their own development needs</p>	<p>3.1 Identify organisational policies relating to personal development</p> <p>3.2 Explain the need to maintain a positive attitude to feedback on performance</p> <p>3.3 Explain the potential business benefits of personal development</p> <p>3.4 Identify their own preferred learning style(s)</p> <p>3.5 Identify their own development needs from analyses of the role, personal and team objectives</p> <p>3.6 Use feedback from others to identify their own development needs</p> <p>3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs</p>	<p>4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2 Make use of formal development opportunities that are consistent with business needs</p> <p>4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4 Review progress against agreed objectives and amend plans accordingly</p> <p>4.5 Share lessons learned with others using agreed communication methods</p>					
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

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Learner
Achievement
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Level 2 Diploma in Customer Service – Group B

Qualification
Accreditation Number:
601/3544/X
Version AIQ004414

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Optional Group B

Unit 6

Title	Communicate verbally with customers		
Level	2		
Credit	3		
Unit accreditation no.	D/506/2119		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to communicate verbally with customers	1.1 Explain the importance of effective communication in customer service		
	1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience		
	1.3 Explain why “customer service language” is used		
	1.4 Describe different questioning techniques that can be used when communicating with customers		
	1.5 Describe verbal and non-verbal signals that show how a customer may be feeling		
	1.6 Describe the types of information needed when communicating verbally with customers		

2. Be able to use customer service language to communicate with customers	2.1 Identify customers' wants and priorities			
	2.2 Listen "actively" to what customers are saying			
	2.3 Communicate clearly, concisely and professionally with customers			
	2.4 Use a tone of voice and expression that reinforces messages when communicating with customers			
	2.5 Use language that reinforces empathy with customers			
	2.6 Adapt their response in accordance with customers' changing behaviour			
	2.7 Provide information and advice that meets customers' needs			
	2.8 Maintain organisational standards of behaviour and communication when interacting with customers			
	2.9 Check that customers have understood what has been communicated			
	2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 7

Title	Communicate with customers in writing		
Level	2		
Credit	3		
Unit accreditation no.	T/506/2126		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes		
	1.2 Describe practices for producing different forms of written communications		
	1.3 Describe the potential benefits and limitations associated with communicating with customers in writing		
	1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing		
2. Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication		
	2.2 Gather the information needed to draft the communication		
	2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer		
3. Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone		
	3.2 Use language that is clear and concise, adapting it to meet identified customer needs		
	3.3 Record decisions and actions taken and the reasons for them		
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

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Learner
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Level 2 Diploma in Customer Service – Group C


Qualification
Accreditation Number:
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Version AIQ004415

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Optional Group C

Unit 8

Title	Deal with incoming telephone calls from customers		
Level	2		
Credit	3		
Unit accreditation no.	H/506/2154		
Learning Outcomes The learner will:	Assessment Criteria The learner can: 		
1. Understand how to deal with incoming customer calls	1.1 Explain why an organisation should have guidance on dealing with telephone calls		
	1.2 Explain why an organisation should have an identity checking process		
	1.3 Explain the importance of keeping customer information up to date		
	1.4 Explain the importance of keeping customers informed of the progress of their call		
	1.5 Describe how body language and facial expressions can be detected over the telephone		
	1.6 Describe different questioning techniques used when dealing with incoming calls		
	1.7 Explain how to handle abusive calls		

2. Be able to establish the purpose of incoming customer calls	2.1 Verify the identity of callers in line with organisational guidelines				
	2.2 Speak clearly, concisely and politely using speech and tone to create a rapport				
	2.3 Adapt their own communication style to meet customers' needs				
	2.4 Listen actively to what customers are saying to collect as much information as possible				
	2.5 Use questioning techniques that are appropriate to the conversation				
	2.6 Record information in line with organisational guidelines				
3. Be able to deal with customer questions and requests	3.1 Respond in a way that best meets customer and organisational requirements				
	3.2 Give clear and concise information that meets customers' needs				
	3.3 Manage the length of the conversation				
	3.4 Confirm that the customer is satisfied with the outcomes of the conversation				
	3.5 Complete agreed post-call follow up actions				
Evidence Requirements					
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.					
Simulation					
Simulation is not allowed.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 9

Title	Make telephone calls to customers		
Level	2		
Credit	3		
Unit accreditation no.	K/506/2155		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
1. Understand how to make telephone calls to customers			
			1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls
			1.2 Explain the importance of keeping customer information up to date
			1.3 Explain the reasons for organisational guidance on dealing with telephone calls
			1.4 Explain the reasons for organisational identity checking processes
			1.5 Explain how body language and facial expressions can be detected over the telephone
			1.6 Describe different questioning techniques when dealing with customers
			1.7 Explain organisational guidelines for what can and cannot be said or promised
			1.8 Explain how to handle abusive calls from customers
2. Be able to plan telephone calls to customers			2.1 Identify the objective(s) of calls
			2.2 Prepare the information needed to make calls
			2.3 Plan the structure of calls
			2.4 Identify customers' likely responses and how they can be dealt with

3. Be able to make telephone calls to customers	3.1 Use telecommunications equipment in accordance with organisational standards			
	3.2 Confirm the identity of customers in line with organisational guidelines			
	3.3 Make the customer aware of the purpose of the call as early as possible			
	3.4 Speak clearly, concisely and politely, using speech and tone to create rapport			
	3.5 Adapt their own communication style to meet customers' needs			
	3.6 Listen actively to what customers are saying to collect as much information as possible			
	3.7 Give clear and concise information that meets customers' needs			
	3.8 Record information in line with organisational guidelines			
	3.9 Complete agreed follow up actions after closing the telephone call			
	Evidence Requirements			
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 10

Title	Promote additional products and/or services to customers		
Level	2		
Credit	2		
Unit accreditation no.	L/506/2133		
Learning Outcomes The learner will:	↘	Initial	Evidence Reference
1. Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services		
	1.2 Explain the importance of keeping product/service knowledge up to date		
	1.3 Explain how to match products and/or services to customer needs		
	1.4 Describe techniques to promote additional products and/or services		
2. Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience		
	2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers		
	2.3 Provide information to customers that will help them to decide whether to select additional products and/or services		
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services		
Evidence Requirements	Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.		
Simulation	Simulation is not allowed.		

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 11

Title		Process information about customers		
Level		2		
Credit		3		
Unit accreditation no.		R/506/2134		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
		Initial		
		Evidence Reference		
1. Understand how to process customer information		▶		
		1.1 Describe the functions of customer information systems		
		1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information		
		1.3 Explain different responsibilities and levels of authority for processing customer service information		
		1.4 Explain the reliability of sources of customer information		
		1.5 Explain the validity of customer information		
2. Be able to process customer information		2.1 Record information about customers in line with organisational standards and procedures		
		2.2 Keep customer information up to date		
		2.3 Respond to requests for customer information from authorised people in a timely manner		
		2.4 Retrieve customer information that meets the requirements of the request		
		2.5 Supply customer information in a format appropriate for the recipient		
		2.6 Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 12

Title		Exceed customer expectations		
Level		2		
Credit		3		
Unit accreditation no.		Y/506/2135		
Learning Outcomes		Assessment Criteria		
The learner will:		The learner can:		
		Initial Evidence Reference		
1. Understand how to exceed customer expectations	1.1	Explain how customers form expectations of the service they will receive		
	1.2	Explain legislation, organisational policies and procedures that can limit or vary the service offer		
	1.3	Explain the types of actions that customers are likely to perceive as adding value		
	1.4	Explain how to recognise when actions taken to offer added value could be built into the service offer		
2. Be able to exceed customer expectations	2.1	Identify differences between customers' expectations and needs and the service offer		
	2.2	Explain the service offer clearly and concisely to customers		
	2.3	Identify options that offer added value without affecting other customers adversely		
	2.4	Make offers to customers within their own authority levels		
	2.5	Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer		
	2.6	Record agreements made and actions taken		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

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Date:

Unit 13

Title	Deliver customer service whilst working on customers' premises		
Level	2		
Credit	4		
Unit accreditation no.	T/506/2143		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit		
	1.2 Explain the importance of being positive about the product and/or service		
	1.3 Explain organisational standards of presentation, behaviour and communication		
	1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed		
	1.5 Explain how to identify possible risks relating to the work to be carried out		
	1.6 Explain the way in which legislation affects the work to be carried out		

<p>2. Be able to deliver customer service whilst working on customers' premises</p>	<p>2.1 Identify themselves to customers</p> <p>2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises</p> <p>2.3 Confirm with customers the nature of work to be carried out on their premises</p> <p>2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed</p> <p>2.5 Treat customers, their premises and property with consideration</p> <p>2.6 Confirm that the customer is satisfied with the outcome</p> <p>2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed for this unit except as detailed below. Simulation may be used for assessment criteria 2.4 (delays, variations) if no naturally occurring evidence is available.</p>				
<p>Supplementary evidence Supplementary evidence such as questioning may be used for assessment criteria 2.4 (delays, variations) if no naturally occurring evidence is available.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Date:

Unit 14

Title	Carry out customer service handovers		
Level	2		
Credit	3		
Unit accreditation no.	T/506/2157		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the customer service handover process	1.1 Explain an organisation's customer service handover procedures		
	1.2 Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues		
	1.3 Explain why, when and how to set reminders to follow up on actions handed over to others		
	1.4 Explain levels of their own responsibility in the customer service handover process		
2. Be able to plan customer service handovers	2.1 Identify the steps in the customer service delivery process that rely on exchanges of information among team members		
	2.2 Agree with colleagues when to pass customer service issues from one person to another		
	2.3 Agree methods of information exchange		

3. Be able to carry out customer service handovers	3.1 Explain to customers to whom and why a handover is being made			
	3.2 Exchange information with colleagues in line with organisational procedures			
	3.3 Check that actions required by others following handovers have been completed			
	3.4 Identify further actions when the activities required by others have not been completed			
	3.5 Share feedback with colleagues to make improvements to handover processes			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 15

Title	Resolve customer service problems		
Level	2		
Credit	5		
Unit accreditation no.	A/506/2158		
Learning Outcomes The learner will:	▶	Initial	Evidence Reference
1. Understand the resolution of customer service problems	1.1 Describe the organisation's customer service and complaints procedures		
	1.2 Describe techniques to identify customer service problems and their causes		
	1.3 Describe techniques to deal with situations where customers become agitated or angry		
	1.4 Explain the limits of their own authority for resolving customers' problems and making promises		
	1.5 Explain the purpose of encouraging customers to provide feedback		
	1.6 Describe methods used to encourage customers to provide feedback		

2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems			
	2.2 Identify workable options for resolving problems within organisational guidelines			
	2.3 Use the most appropriate method of communication for dealing with customers			
	2.4 Agree with customers the option that best meets their needs and those of the organisation			
	2.5 Keep customers informed of progress			
	2.6 Fulfil promises made to customers during the resolution process			
	2.7 Share customer feedback with others to improve the resolution of customer service problems			
	2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems			
3. Be able to manage unresolved customer service problems	3.1 Explain to customers the reasons why problems cannot be resolved			
	3.2 Refer customers to other sources of help if their problems cannot be resolved			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 16

Title	Deliver customer service to challenging customers		
Level	2		
Credit	3		
Unit accreditation no.	F/506/2159		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment		
	1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers		
	1.3 Explain behaviours that make it challenging to deal with customers		
	1.4 Explain the difference between assertive and aggressive behaviour		
	1.5 Describe techniques to deal with customers' challenging behaviour		
	1.6 Explain their own levels of authority for agreeing actions outside the service offer		
	1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters		

2. Be able to deal with challenging customers	2.1 Identify the signs that indicate that a customer is challenging			
	2.2 Express understanding of customers' point of view without admitting liability			
	2.3 Explain to customers the limits of the service they can offer			
	2.4 Explain to customers the reasons for an organisation's position and policy			
	2.5 Agree a way forward that balances customer satisfaction and organisational needs			
	2.6 Obtain help from colleagues when options for action are beyond their level of authority			
	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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2. Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations			
	2.2 Identify new ways of helping customers based on their feedback			
	2.3 Share feedback from customers with others			
	2.4 Identify added value that the organisation could offer customers			
	2.5 Bring to customers' attention products or services that may interest them			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 18

Title	Support customer service improvements			
Level	2			
Credit	3			
Unit accreditation no.	T/506/2160			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence	Reference
1. Understand how to support customer service improvements	<p>1.1 Describe different sources of information that may help identify ways of improving customer service</p> <p>1.2 Describe the constraints on suggesting improvements to customer service</p> <p>1.3 Explain the limits of their own authority in implementing improvements</p>			
2. Be able to identify the potential for improvements to customer service	<p>2.1 Use information from a range of sources to understand the customer experience</p> <p>2.2 Identify potential areas where customer service could be improved from an analysis of information</p> <p>2.3 Make recommendations for improvement that are based on evidence from analysed information</p>			
3. Be able to support the implementation of improvements to customer service	<p>3.1 Implement agreed improvements within the limits of their own authority</p> <p>3.2 Inform customers of improvements to customer service</p> <p>3.3 Identify the impact of improvements to customer service and feedback to relevant people</p>			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

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Unit 19

Title	Support customers through real-time online customer service		
Level	2		
Credit	3		
Unit accreditation no.	A/506/2161		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to support customers through real-time online customer service	1.1 Explain how an organisation's online customer service system works		
	1.2 Explain how to navigate their own customer service site		
	1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services		
	1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems		
2. Be able to establish the customer service support needed by customers	2.1 Identify customers' familiarity with the site		
	2.2 Identify the difficulties faced by customers when navigating websites		
	2.3 Identify the support for customers that will meet their needs		
3. Be able to support online customer service in real-time	3.1 Step through screen sequences while the customer operates the system		
	3.2 Communicate with customers in terms they can understand		
	3.3 Inform customers of what is happening and why certain steps are required		
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Date:

Unit 20

Title	Use social media to deliver customer service		
Level	2		
Credit	3		
Unit accreditation no.	J/506/2163		
Learning Outcomes The learner will:	▶	Initial	Evidence Reference
1. Understand social media in a business environment	1.1 Explain how different social media platforms can be used for customer service		
	1.2 Describe different audience groups for a range of social media platforms		
	1.3 Explain the importance of monitoring customer posts in social media networks		
	1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes		
	1.5 Explain the etiquette of communication within different social media platforms		
	1.6 Explain the importance of security settings and how they are used on different social media platforms		
	1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media		
2. Be able to deal with customers using social media	2.1 Monitor social media to identify customer questions, requests and comments		
	2.2 Make responses that are appropriate to posts made by customers on social media networks		
	2.3 Take action to ensure that customers are satisfied before closing dialogue		
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 21

Title	Resolve customers' complaints		
Level	3		
Credit	4		
Unit accreditation no.	R/506/2151		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints		
	1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery		
	1.3 Explain negotiating techniques used to resolve customers' complaints		
	1.4 Explain conflict management techniques used in dealing with upset customers		
	1.5 Explain organisational procedures for dealing with customer complaints		
	1.6 Explain when to escalate customers' complaints		
	1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint		
	1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services		

2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints			
	2.2 Take personal responsibility for dealing with complaints			
	2.3 Communicate in a way that recognises customers' problems and understands their points of view			
	2.4 Explain the advantages and limitations of different complaint response options to customers			
	2.5 Explain the advantages and limitations of different complaint response options to the organisation			
	2.6 Keep customers informed of progress			
	2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority			
	2.8 Record the outcome of the handling of complaints for future reference			
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 22

Title	Gather, analyse and interpret customer feedback		
Level	3		
Credit	5		
Unit accreditation no.	D/506/2170		
Learning Outcomes	▼		
The learner will:	Assessment Criteria	Initial	Evidence Reference
1. Understand how to gather, analyse and interpret customer feedback	The learner can:		
	1.1 Describe methods of collecting data for customer research		
	1.2 Explain random sampling techniques used to collect data		
	1.3 Explain how to evaluate bias in non-random samples		
	1.4 Explain the principles of questionnaire design		
	1.5 Assess the suitability of a range of techniques to analyse customer feedback		
	1.6 Explain techniques used to monitor the quality of data collected		
	1.7 Explain the use of software to record and analyse customer feedback		
	1.8 Explain the validation issues associated with customer feedback		
1.9 Explain the importance of anonymising comments from customers who do not wish to be identified			

<p>2. Be able to plan the collection of customer feedback on customer service issues</p>	<p>2.1 Identify the objectives of collecting customer feedback</p> <p>2.2 Justify the reasons for selecting different data collection methods</p> <p>2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe</p>						
<p>3. Be able to gather customer feedback</p>	<p>3.1 Collect customer feedback using the sampling frame identified in a customer service plan</p> <p>3.2 Record data in a way that makes analysis straightforward</p> <p>3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures</p>						
<p>4. Be able to analyse and interpret customer feedback to recommend improvements</p>	<p>4.1 Use data analysis methods to identify patterns and trends in customer feedback</p> <p>4.2 Use the findings of a data analysis to identify areas for improvement to customer service</p> <p>4.3 Present the findings of an analysis in the agreed format</p> <p>4.4 Recommend improvements in response to the findings of an analysis</p>						
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 23

Title	Support customers using self-service equipment		
Level	2		
Credit	3		
Unit accreditation no.	H/506/2977		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to support customers using self-service equipment	<p>1.1 Explain how the self-service equipment works</p> <p>1.2 Describe problems that are commonly encountered by customers when using self-service equipment</p> <p>1.3 Explain demonstration techniques to use when supporting customers using self-service equipment</p> <p>1.4 Explain organisational procedures for the use of equipment and fault reporting</p>		
2. Be able to identify the help needed by customers using self-service equipment	<p>2.1 Identify signs that show when a customer is having difficulty with the self-service equipment</p> <p>2.2 Identify a style and level of intervention that meets customers' needs</p>		
3. Be able to help customers to use self-service equipment	<p>3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment</p> <p>3.2 Use staff override functions to enable self-service equipment to be used by customers</p> <p>3.3 Explain to customers how to use the equipment and complete the transaction</p> <p>3.4 Report equipment-related errors and issues to the right person</p>		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 24

Title	Provide post-transaction customer service			
Level	2			
Credit	5			
Unit accreditation no.	K/506/2978			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference	
1. Understand post-transaction customer service	1.1 Explain organisational policies and procedures for post-transaction customer service			
	1.2 Explain the purposes and range of post-transaction activities			
	1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service			
	1.4 Explain how legislation and regulation affect customers' rights			
	1.5 Explain the advantages and disadvantages of post-transaction customer service programmes			
	2. Be able to provide post-transaction customer service	2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines		
		2.2 Use unplanned opportunities post-transaction to provide customer service		
		2.3 Identify reasons for contacting customers post-transaction		
		2.4 Confirm customers' levels of satisfaction post-transaction		
		2.5 Make recommendations to decision makers to enhance customer satisfaction		
2.6 Present a professional and helpful image				

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

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Learner
Achievement
Portfolio

Level 2 Diploma in Customer Service – Group D

Qualification
Accreditation Number:
601/3544/X
Version AIQ004416

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Optional Group D

Unit 25

Title	Health and safety procedures in the workplace		
Level	2		
Credit	2		
Unit accreditation no.	T/505/4673		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	✓	Initial Evidence Reference
1. Know health and safety procedures in the workplace	1.1 Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees		
	1.2 Describe two health and safety laws affecting the workplace		
	1.3 Define the importance of following health and safety procedures in the workplace		
	1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace		
	2.1 Carry out a risk assessment of a specified workplace activity		
2. Be able to carry out tasks with regard to health and safety in the workplace	2.2 Use equipment or tools safely in the workplace		
	2.3 Describe how to prevent accidents in the workplace		
	2.4 Assess how own health and safety practices could be improved		
Evidence Requirements			
There are no specific evidence requirements for this unit. The criteria can be met through a combination of assessor observations, witness testimony and/or authentic records of the learner's work.			
Simulation			
Simulation is not allowed.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

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Unit 26

Title		Manage diary systems			
Level		2			
Credit		2			
Unit accreditation no.		L/506/1807			
Learning Outcomes The learner will:		Assessment Criteria The learner can:			
1. Understand the management of diary systems		Initial			
		Evidence Reference			
		✓			
		1.1 Explain the importance of keeping diary systems up to date			
		1.2 Describe the basis on which bookings and changes are prioritised			
		1.3 Explain any constraints relating to making bookings for people or facilities			
		1.4 Describe the types of problems that can occur when managing diaries			
		2.1 Obtain the information needed to make diary entries			
		2.2 Make accurate and timely diary entries			
		2.3 Respond to changes in a way that balances and meets the needs of those involved			
2.4 Communicate up-to-date information to everyone involved					
2.5 Keep diaries up-to-date					
2.6 Maintain the requirements of confidentiality					
2. Be able to manage diary systems					

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 27

Title	Provide reception services		
Level	2		
Credit	3		
Unit accreditation no.	H/506/1814		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand reception services	1.1 Explain the receptionist's role in representing an organisation		
	1.2 Explain an organisation's structure and lines of communication		
	1.3 Describe an organisation's standards of presentation		
	1.4 Explain the health, safety and security implications of visitors to a building		
	1.5 Explain how to deal with challenging people		

2. Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards				
	2.2 Direct visitors to the person they are visiting in accordance with organisational standards				
	2.3 Record visitors' arrivals and departures in accordance with organisational procedures				
	2.4 Provide advice and accurate information within organisational guidelines on confidentiality				
	2.5 Keep the reception area tidy and materials up-to-date				
	2.6 Answer and deal with telephone calls within organisational standards				
	2.7 Adhere to organisational procedures on entry, security, health and safety				
	Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.					
Simulation					
Simulation is not allowed.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 28

Title		Contribute to the organisation of an event		
Level		2		
Credit		3		
Unit accreditation no.		L/506/1869		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand event organisation	1.1	Explain the roles, responsibilities and accountabilities of individuals involved in the event		
	1.2	Explain the purpose and features of different types of events		
	1.3	Describe the type of resources needed for different types of events		
	1.4	Describe the different needs attendees may have and how to meet these		
	1.5	Explain the requirements of health, safety and security when organising events		
	1.6	Describe the types of problems that may occur during events and how to deal with them		
	2. Be able to carry out pre-event actions	2.1	Identify venue requirements for an event	
2.2		Obtain resources within the agreed timescales		
2.3		Distribute pre-event documentation to delegates in accordance with the event plan		
2.4		Co-ordinate attendee responses within the agreed timescale		
2.5		Identify any special requirements of event attendees		

<p>3. Be able to set up an event</p>	<p>3.1 Set up layout and resources in accordance with the event plan</p> <p>3.2 Confirm that all identified resources are in place and meet requirements</p> <p>3.3 Behave in a way that maintains organisational values and standards</p>						
<p>4. Be able to carry out post-event actions</p>	<p>4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract</p> <p>4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event</p>						
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

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Unit 29

Title	Buddy a colleague to develop their skills			
Level	2			
Credit	3			
Unit accreditation no.	M/506/1895			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference	
1. Understand how to buddy a colleague	1.1 Describe what is expected of a buddy			
	1.2 Explain techniques to give positive feedback and constructive criticism			
	1.3 Explain techniques to establish rapport with a buddy			
2. Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying			
	2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague			
	2.3 Agree a schedule of meetings that minimise disruption to business			
	2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives			

3. Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities			
	3.2 Provide examples of how to carry out tasks correctly			
	3.3 Identify instances of good practice and areas for improvement through observation			
	3.4 Praise a buddy colleague on well completed tasks			
	3.5 Give constructive feedback on ways in which a buddy could improve performance			
	3.6 Offer a buddy hints and tips based on personal experience			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 30

Employee rights and responsibilities					
2					
2					
L/506/1905					
Assessment Criteria		➤		Initial	Evidence Reference
The learner will:		The learner can:			
1. Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry				WORKSHEET
	1.2 Describe career pathways within their organisation and industry				
	1.3 Identify sources of information and advice on an industry, occupation, training and career pathway				
	1.4 Describe an organisation's principles of conduct and codes of practice				
	1.5 Explain issues of public concern that affect an organisation and industry				
	1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role				
	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role				
	2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour				
	2.3 Describe the procedures and documentation that protect relationships with employees				
	2.4 Identify sources of information and advice on employment rights and responsibilities				
Evidence Requirements					
This is a knowledge based unit. Please see worksheet section at the end of Optional Group D.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

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Date:

Unit 31

Title		Develop working relationships with colleagues		
Level		2		
Credit		3		
Unit accreditation no.		R/506/1789		
Learning Outcomes		▼		
The learner will:		Initial Evidence Reference		
1. Understand the principles of effective team working	1.1 Outline the benefits of effective team working			
	1.2 Describe how to give feedback constructively			
	1.3 Explain conflict management techniques that may be used to resolve team conflicts			
	1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising			
	1.5 Explain the importance of warning colleagues of problems and changes that may affect them			
	2.1 Recognise the contribution of colleagues to the achievement of team objectives			
	2.2 Treat colleagues with respect, fairness and courtesy			
	2.3 Fulfil agreements made with colleagues			
	2.4 Provide support and constructive feedback to colleagues			
	2. Be able to maintain effective working relationships with colleagues			

3. Be able to collaborate with colleagues to resolve problems	3.1 Take others' viewpoints into account when making decisions			
	3.2 Take ownership of problems within own level of authority			
	3.3 Take action to minimise disruption to business activities within their own level of authority			
	3.4 Resolve problems within their own level of authority and agreed contribution			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 32

Title	Principles of equality and diversity in the workplace		
Level	2		
Credit	2		
Unit accreditation no.	J/506/1806		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the implications of equality legislation	1.1 Define the concept 'equality and diversity'		WORKSHEET
	1.2 Describe the legal requirements for equality of opportunity		
	1.3 Describe the role and powers of organisations responsible for equality		
	1.4 Explain the benefits of equal opportunities and diversity		
	1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation		
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace		
	2.2 Describe their own responsibilities for equality and diversity in the workplace		
	2.3 Describe behaviours that support equality, diversity and inclusion in the workplace		
Evidence Requirements			
This is a knowledge based unit. Please see worksheet section at the end of Optional Group D.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 33

Title	Processing sales orders		
Level	2		
Credit	2		
Unit accreditation no.	M/502/8587		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing		
	1.2 Describe organisational processes for ordering products and/ or services		
	1.3 Describe different sources of information used to check customer credit		
	1.4 Describe the different payment methods accepted by sales orientated organisations		
	1.5 Explain the role of the despatch function		
	1.6 Describe service standards relating to sales order completion		
	1.7 Explain the importance of storing information securely		

2. Be able to process sales orders	<p>2.1 Identify customer sales order requirements</p> <p>2.2 Check that the credit status of the customer meets organisational standards</p> <p>2.3 Confirm the availability of products and/or services to the customer</p> <p>2.4 Ensure that information given to the customer about delivery, timing and price is accurate</p> <p>2.5 Ensure that the sale is authorised following the organisation's procedures</p> <p>2.6 Finalise the transaction in accordance with organisational procedures</p> <p>2.7 Ensure that the customer is aware of the terms and conditions of sale</p> <p>2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders</p> <p>2.9 Identify who to go to when in need of support with sales order processing problems</p>			
3. Be able to follow up sales order processing	<p>3.1.1. Keep the customer informed of the sales order progress and any problems with the sale order</p> <p>3.2. Advise the customer of current discounts and special offers</p> <p>3.3. Check all information is stored securely</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Assessment of this unit may be based on either the learner's performance at work or through simulation, where necessary. If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 34

Title	Meeting customers' after sales needs		
Level	2		
Credit	3		
Unit accreditation no.	R/502/8601		
Learning Outcomes	Assessment Criteria	Initial	Evidence Reference
The learner will:	The learner can:	▼	
1. Be able to investigate customer after sales needs	1.1 Establish the nature of customers' after sales needs		
	1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times		
2. Be able to handle customers' after sales needs	2.1 Deal with customers' after sales needs following organisational customer service standards and procedures		
	2.2 Balance customers' needs with those of the organisation		
	2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority		
	2.4 Fulfil commitments made to customers in accordance with quality and customer service standards		
	2.5 Record commitments made to customers		
3. Be able to review the after sales process	3.1 Obtain customers' comments on service reliability		
	3.2 Analyse and report the findings to the relevant person in the organisation		
	3.3 Make recommendations for improvements to after sales service provision in the light of customer feedback		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Assessment of this unit may be based on either the learner's performance at work or through simulation, where necessary. If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).

This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 35

Title	Handling objections and closing sales		
Level	2		
Credit	3		
Unit accreditation no.	M/502/8606		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to handle sales objections	1.1 Explain the difference between standard and non-standard sales objections		
	1.2 Explain how to clarify objections and identify potential sales opportunities from them		
	1.3 Describe how to use questioning techniques to explore and resolve customer issues		
	1.4 Explain how to empathise with and reassure the customer		
	1.5 Explain the difference between hypothetical and real objections		
	1.6 Explain how knowledge of products and services can be used to answer objections		
	1.7 Explain how competitor activity may affect the potential sale		
	1.8 Describe how industry/sector pricing structures may have an impact on sales objections		
	1.9 Explain the scope of authority and responsibility when dealing with objections		
	1.10 State who to go to when in need of support to overcome objections		

2. Understand how to close the sale	<p>2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale</p> <p>2.2 Explain how to perform a trial close</p> <p>2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale</p> <p>2.4 Explain potential barriers to closing the sale</p> <p>2.5 Explain a range of ways to close the sale</p>			
3. Be able to handle objections	<p>3.1 Clarify the nature and extent of objections</p> <p>3.2 Explain to the customer the concessions available within the scope of authority</p> <p>3.3 Follow organisational procedures for dealing with objections</p> <p>3.4 Promote the benefits of products and/or services to overcome objections</p> <p>3.5 Use testimonials to overcome objections</p> <p>3.6 Refer to those in authority when dealing with objections outside the scope of own authority</p>			
4. Be able to close the sale	<p>4.1 Perform a trial close and ask for the order when objections have been met</p> <p>4.2 Make use of add-on, up-selling or cross-selling opportunities</p> <p>4.3 Follow organisational procedures for accepting confirmation of an order</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 36

Title	Deal with incidents through a contact centre		
Level	2		
Credit	7		
Unit accreditation no.	K/503/0421		
Learning Outcomes	▼		
The learner will:	Assessment Criteria		
<p>1. Be able to deal with incidents through a contact centre</p>	The learner can:		
	1.1 Respond to incoming calls in a calm and professional manner		
	1.2 Maintain control of the conversation		
	1.3 Record the contact and information in an incident log in accordance with organisational procedures		
	1.4 Assess and prioritise reported incidents in accordance with organisational procedures		
	1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures		
	1.6 Provide information, advice and support in response to requests in accordance with organisational procedures		
	1.7 Escalate incident responses in accordance with organisational procedures		
	Initial	Evidence	Reference

<p>2. Be able to use contact centre communications systems to deploy incident management resources</p>	<p>2.1 Communicate with external organisations in accordance with organisational procedures</p> <p>2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident</p> <p>2.3 Use agreed conventions of wording, style and approach appropriate for different communication media</p>	<p>3. Understand how to deal with incidents in a contact centre</p>	<p>3.1 Describe the incident management services offered by the contact centre</p> <p>3.2 Describe the impact of regulation or legislation on incident management</p> <p>3.3 Describe the purpose and use of decision trees</p> <p>3.4 Describe how to determine the appropriate allocation of resources to incidents</p> <p>3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response</p> <p>3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident</p> <p>3.7 Describe standard wording and codes used by the organisation when dealing with incident management</p> <p>3.8 Describe the type and extent of resources available for deployment in incident management</p>																				
<p>Evidence Requirements</p>																							
<p>Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>																							
<p>Simulation</p>																							
<p>Simulation is not allowed.</p>																							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 37

Title	Carry out direct sales activities in a contact centre		
Level	2		
Credit	5		
Unit accreditation no.	L/503/0394		
Learning Outcomes The learner will:	▶	Initial	Evidence Reference
1. Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales		
	1.2 Obtain from customers sufficient information to support direct sales activities		
	1.3 Create sales opportunities by making links between information provided by customers and products and/or services		
	1.4 Find potential new customers for products and/or services		
2. Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures		
	2.2 Check customers' wishes and needs		
	2.3 Identify possible matches with products and/or services from information provided by customers		
	2.4 Explain to customers the features and benefits of products and/or services for sale		
	2.5 Adapt their sales approach and style to meet customer preferences		
	2.6 Maximise opportunities for cross-selling and up-selling		
	2.7 Complete the authorisation or payment in accordance with organisational procedures		

3. Be able to keep direct sales records within a contact centre	3.1 Identify the information about customers, products and/or services that should be recorded during the sales process 3.2 Record customer, product and/or service information in accordance with organisational procedures				
4. Be able to comply with regulations and legislation during direct sales in a contact centre	4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre 4.2 Ensure compliance with regulations during direct selling through a contact centre				
5. Understand how to conduct sales activities in a contact centre	5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre 5.2 Describe the organisational policies and procedures for direct sales through a contact centre 5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities 5.4 Describe the common objections and questions raised by customers during direct selling 5.5 Explain how to identify cross-selling and up-selling opportunities 5.6 Describe different methods of researching potential new customers 5.7 Explain how to retrieve information from organisational sales records 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling				
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.					
Simulation Simulation is not allowed.					

Assessor feedback

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Unit 38

Title	Negotiate in a business environment		
Level	3		
Credit	4		
Unit accreditation no.	H/506/1912		
Learning Outcomes The learner will:	↘	Initial	Evidence Reference
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy		
	1.2 Explain the use of different negotiation techniques		
	1.3 Explain how research on the other party can be used in negotiations		
	1.4 Explain how cultural differences might affect negotiations		
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation		
	2.2 Explain the scope of their own authority for negotiating		
	2.3 Prepare a negotiating strategy		
	2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities		
	2.5 Assess the likely objectives and negotiation stances of the other party		
	2.6 Research the strengths and weaknesses of the other party		

<p>3. Be able to carry out business negotiations</p>	<p>3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities</p>				
	<p>3.2 Adapt the conduct of the negotiation in accordance with changing circumstances</p>				
	<p>3.3 Maintain accurate records of negotiations, outcomes and agreements made</p>				
	<p>3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 39

Title	Bespoke software		
Level	2		
Credit	3		
Unit accreditation no.	F/502/4396		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Input and combine information using bespoke applications	<p>1.1 Input relevant information accurately so that it is ready for processing</p> <p>1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software</p> <p>1.3 Respond appropriately to data entry error messages</p>		
2. Use appropriate structures to organise and retrieve information efficiently	<p>2.1 Describe what functions to apply to structure and layout information effectively</p> <p>2.2 Select and use appropriate structures and/or layouts to organise information</p> <p>2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available</p>		
3. Use the functions of the software effectively to process and present information	<p>3.1 Select and use appropriate tools and techniques to edit, process and format information</p> <p>3.2 Check information meets needs, using IT tools and making corrections as necessary</p> <p>3.3 Select and use appropriate methods to present information</p>		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

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This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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