

APPROVED CARIBBEAN VOCATIONAL QUALIFICATION STRUCTURE
CUSTOMER SERVICE- LEVEL 2 - CCA010-02

A minimum of six (6) units must be completed to achieve the full award, candidates must complete five (5) mandatory units plus one (1) optional unit, making a total of six (6) units.

Mandatory Units (All must be completed)	TVETC Number
1 Give customers a positive impression of yourself and your organisation 1.1 Establish effective relationships with customers 1.2 Respond appropriately to customers 1.3 Communicate information to customers	U09602
2 Deliver reliable customer service 2.1 Prepare to deal with your customers 2.2 Give consistent service to customers 2.3 Check customer service delivery	U12902
3 Develop customer relationships 3.1 Build customer confidence in the level of service provided 3.2 Meet the ongoing needs and expectations of your customers 3.3 Develop the relationship between your customers and your organisation	U13002
4 Resolve customer service problems 4.1 Identify customer service problems 4.2 Select the best solution to resolve customer service problems 4.3 Implement the solution to customer service problems	U13102
5 Maintain a safe and secure working environment 5.1 Maintain personal health and hygiene 5.2 Carry out procedures in the event of a fire 5.3 Deal with the discovery of suspicious items/packages 5.4 Carry out procedures in the event of an accident 5.5 Maintain a safe work environment for customers, staff and visitors 5.6 Maintain a secure work environment for customers, staff and visitors	U00306

QUALIFICATION OVERVIEW

CVQ UNITS OF COMPETENCE

Optional Units (Choose one)

6	Support customer service improvements	U13202
6.1	Use feedback to identify potential customer service improvements	
6.2	Contribute to the implementation of changes in customer service	
6.3	Assist with the evaluation of changes in customer service	
7	Develop personal performance through delivering customer service	U13302
7.1	Review performance in your customer service role	
7.2	Prepare a personal development plan and keep it up to date	
7.3	Undertake development activities and obtain feedback on your customer service performance	
8	Promote additional products or services to customers	U13402
8.1	Identify additional products or services that are available	
8.2	Inform customers about additional products or services	
8.3	Gain customer commitment to using additional products or services	
9	Process customer service information	U13502
9.1	Collect customer service information	
9.2	Select and retrieve customer service information	
9.3	Supply customer service information	

U09602: Give customers a positive impression of yourself and your organisation

Unit Descriptor:

Excellent customer service is provided by people who are good with people.

Your behaviour affects the impression that customers form of the service they are receiving.

This unit is all about communicating with customers and giving a positive impression of yourself whenever you deal with a customer. By doing this you will also be giving a positive impression of your organisation and the customer service it provides.

All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, respond to us and give us good information. Every detail of your behaviour when dealing with a customer counts and this unit gives you the opportunity to prove that you can create that positive impression.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

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|---|--|
| 1. Establish effective relationships with customers | 1.1 Meet your organisation's standards for appearance and behaviour. |
| | 1.2 Greet your customers in a way that will make them feel welcome and shows that you are interested in serving them. |
| | 1.3 Communicate with your customers in a manner that makes them feel valued and respected. |
| | 1.4 Identify and confirm the needs and expectations of your customers. |
| | 1.5 Treat your customers courteously and helpfully even when you are working under pressure. |
| | 1.6 Maintain communication with customers to ensure that they are kept informed and reassured. |

- 1.7 Adapt your behaviour to respond effectively to different customer behaviour.
- 2. Respond appropriately to customers
 - 2.1 Respond appropriately to **customers** who indicate that they need or want your attention.
 - 2.2 Select an appropriate way of **communicating** with your customers to suit their individual needs.
 - 2.3 Respond promptly and positively to your customers' questions and comments.
 - 2.4 Allow your customers time to consider your response and give further explanation when appropriate.
 - 2.5 Check with your customers that you have fully understood their needs and expectations.
- 3. Communicate information to customers
 - 3.1 Locate information that will help your **customers** quickly.
 - 3.2 **Communicate** to your customers the information they need about the products or services offered by your organisation.
 - 3.3 Recognise information that your customers might find complicated and check whether they fully understand.
 - 3.4 Explain clearly to your customers any reasons why their needs and expectations cannot be met.

RANGE STATEMENT

You must cover the items below:

Element 1: Establish effective relationships with customers**A. Types of customers: *(Also applies to Elements 2 and 3)***

- (i) have different needs and expectations
- (ii) appear angry
- (iii) appear confused
- (iv) behave unconventionally

B. Communicate by: *(Also applies to Elements 2 and 3)*

- (i) face-to-face methods (including verbal and non-verbal communication)
- (ii) using the telephone
- (iii) using written (including electronic) methods

C. Give customers a positive impression: *(Also applies to Elements 2 and 3)*

- (i) during routine delivery of customer service
- (ii) during a busy period for your organisation
- (iii) during a quiet period for your organisation
- (iv) when people, systems or resources have let you down
- (v) when dealing with unusual variations to normal customer enquiries
- (vi) when dealing with customer complaints
- (vii) when dealing with customer enquiries that contain aspects outside your immediate job responsibilities

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of :
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers.
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any; customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.
9. What are your organisation's standards for appearance and behaviour.
10. What are your organisation's guidelines for recognizing customers' needs and expectations and responding positively to them.

Communication

11. How would you communicate in a clear, polite, confident way and why this is important.
12. What are the rules and procedures regarding the methods of communication you use.
13. How would you recognize when a customer is angry and confused.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

You must provide evidence that shows you have performed over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent in meeting all the performance criteria across all aspects of the range.

You must provide evidence of creating a positive impression with customers:

- a. during routine delivery of customer service
- b. during a busy period for your organisation
- c. during a quiet period for your organisation
- d. when people, systems or resources have let you down
- e. when dealing with unusual variations to normal customer enquiries
- f. when dealing with customer complaints
- g. when dealing with customer enquiries that contain aspects outside your immediate job responsibilities.

You also need to show that you have dealt with customers who:

- h. have different needs and expectations
- i. appear angry
- j. appear confused
- k. behave unconventionally

You will need to show in your evidence that you have worked within the rules, regulations and guidelines of your organisation and, where your knowledge of these is limited, you will need to show that you have gone to others for help or advice.

Your communication with customers may be face-to-face, in writing, by telephone, e-mail, internet or by any other method you would be expected to use within your job role.

You must prove that you communicate with customers effectively by providing evidence that you:

- l. use appropriate spoken or written language
- m. apply the rules and procedures suitable for the method of communication you have chosen.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

(2) Methods of Assessment

Performance Evidence for this unit could include:

- Observation reports by your assessor recording how you create a positive impression with customers.
- Copies of your written communications with customers.

Supplementary evidence for this unit could include:

- Witness testimonies from your manager that provide evidence of how you have consistently been able to positively respond to a wide range of customers and their needs in a variety of context over a period of time.
- Witness testimony from customers on how you have created a positive impression of yourself and your organisation while serving them.
- Case histories and personal statements which show how you have created a positive impression with different customers in different circumstances.
- A professional discussion with your assessor using examples of how you have been able to effectively deal with difficult customers.

Knowledge and understanding evidence for this unit could include:

- Answers to questions given to you by your assessor.

(3) Context of Assessment

Your evidence should be collected when you are dealing with real customers, whether internal or external to the organisation:

- when carrying out a real job, whether paid or voluntary;
- in a realistic working environment;
- in a work placement
- Simulation is **not** allowed for any performance evidence within this unit.

U12902:**Deliver reliable customer service**

Unit Descriptor:

This unit is all about how you deliver consistent reliable service to customers as part of your job.

As well as being good with people, you need to work with your organisation's service systems to meet and wherever possible, exceed customer expectations.

In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems to ensure that you:

- are prepared for each transaction
- deal with different types of customers under different circumstances
- check that what you have done has been effective.

When you have completed this unit you will have shown that you can deliver excellent customer service over and over again.

ELEMENT	PERFORMANCE CRITERIA
	<i>To be competent you must achieve the following:</i>
1. Prepare to deal with your customers	1.1 Keep your knowledge of products or services offered by your organisation up-to-date using information from your colleagues and organisational literature.
	1.2 Ensure that any equipment you use is in good and safe working order.
	1.3 Ensure that the area you work in is tidy and the space is used efficiently.
	1.4 Prepare and arrange everything you need to deal with your customers before your shift or period of work commences.

- 2. Give consistent service to customers
 - 2.1 Make realistic commitments to your **customers** regarding products or services during **service** delivery.
 - 2.2 Make extra efforts to keep your commitments to your customers.
 - 2.3 Inform your customers when you cannot keep your commitments due to unforeseen developments.
 - 2.4 Recognise when your customer's needs or expectations have changed and adjust your service to meet their new requirements.
 - 2.5 Pass your customers on to the relevant person or organisation if you are unable to deal with their needs and expectations and keep your customers advised about what is happening.
- 3. Check customer service delivery
 - 3.1 Check that the service you have given meets your **customers'** needs and expectations.
 - 3.2 **Identify** where you could have given a better service to your **customers** and how your service could have been improved.
 - 3.3 Share relevant information with others to maintain your organisation's standards for service delivery.

RANGE STATEMENT

You must cover the items below:

Element 1: Prepare to deal with your customers**A. Prepare and arrange:**

- (i) tools and equipment
- (ii) consumables (wrapping papers, bags etc)
- (iii) documentation

Element 2: Give consistent service to customers

Customers who: *(Also applies to unit 3)*

- (i) have clearly stated needs
- (ii) are not clear about their needs and expectations
- (iii) are unhappy with the level of service being provided

B. Service delivered during:

- (i) busy periods
- (ii) quiet periods
- (iii) times when people, systems or resources have let you down
- (iv) working with colleagues

Element 3: Check customer service delivery**B. Identify by:**

- (i) inviting feedback from colleagues and managers on your performance
- (ii) asking customers for feedback directly
- (iii) examining written customer feedback

UNDERPINNING KNOWLEDGE

You need to understand:

Legislations and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunity
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any; customers have with your organisation.

Productions and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Additional knowledge and understanding for Unit 2

9. What are the organisational procedures and systems for delivering customer service.
10. What are the methods that your organisation uses or might use to measure its effectiveness in delivering customer service.
11. What are the systems in place for checking service delivery.

Communication

12. How would you communicate in a clear, polite confident way and why this is important.
13. How to deal with persons with diverse backgrounds and abilities (e.g. age, cultural, social and religious backgrounds).

EVIDENCE GUIDE**1. CRITICAL ASPECTS OF EVIDENCE**

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers

You must prove that you:

- a. consistently follow the steps of preparing, delivering and checking customer service
- b. have worked with different customers who have different needs and expectations

As well as providing routine delivery of customer service, you need to include evidence which relates to:

- c. busy periods
- d. quiet periods
- e. times when people, systems or resources have let you down
- f. working with colleagues

2. Methods of Assessment

Performance Evidence for this unit could include:

- Observation reports by your assessor recording how you can consistently deliver exceptional customer service.
- Witness testimonies from your manager or customers which provide evidence that you have been able to make realistic commitments to your customers and have made extra efforts to keep to those commitments.
- Work place documents/records.

Supplementary Evidence for this unit could include:

- Case studies which describe situations where you felt you could have provided a better service to your customer.
- Case histories which describe situations where things have gone wrong and the action you took to ensure the customer was happy.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. You must prove that you have delivered high levels of service to customers over a period of time with different customers on different occasions.

U13002: Develop customer relationships

Unit Descriptor:

Long term customer relationships depend on the creation of a positive impression. They also depend on the delivery of consistent and reliable customer service. This will encourage loyalty from external customers or long term service partnerships with internal customers.

With external customers, building a better relationship will encourage customer loyalty. What you do will form or continue a long term customer relationship. This does not mean that you have to deal with the same customers every time they return. However, some of what you do will affect their decision to form or maintain that long term link with your organisation.

With internal customers, building a better relationship will improve the efficiency of the organisation and the way that different parts of it work together.

For this unit you must demonstrate that you have developed customer relationships with external or internal customers or both.

It is important to build their confidence, make them aware of the exact products or services you have to offer and explore their expectations.

ELEMENT	PERFORMANCE CRITERIA
1. Build customer confidence in the level of service provided	<i>To be competent you must achieve the following:</i>
	1.1 Deal with your customers promptly.
	1.2 Communicate with your customers in a way that provides confidence and reassurance in their dealings with your organisation.
	1.3 Manage the time taken to deal with your customers in accordance with organisational guidelines.
1.4 Reassure your customers that you are doing everything possible to keep the commitments made by your organisation.	

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| 2. Meet the ongoing needs and expectations of your customers | 2.1 Operate within the limits of your own authority in attempting to meet your customers' and your organisation's needs. |
| | 2.2 Recognise when there may be a conflict between the needs of your customers and your organisation. |
| | 2.3 Take all reasonable actions to minimise the conflict between your customers' needs and the products or services offered by your organisation. |
| | 2.4 Work effectively with others to resolve difficulties in meeting the needs of your customers and your organisation. |
| 3. Develop the relationship between your customers and your organisation | 3.1 Give additional help and information to your customers in response to their questions and comments about the products or services your organisation provides. |
| | 3.2 Discuss expectations with your customers and explain how these compare with the products or services you and your organisation provide. |
| | 3.3 Inform others of feedback received from your customers and follow up within limits of your authority. |
| | 3.4 Identify new ways of helping your customers based on the feedback they have given you. |

RANGE STATEMENT

You must cover the items below:

Element 1: Build customer confidence in the level of service provided**A. Communicate:**

- (i) face-to-face methods (including verbal and non-verbal communication)
- (ii) using the telephone
- (iii) using written (including electronic) methods

Element 2: Meet the ongoing needs and expectations of your customers**A. Minimise conflict by:**

- (i) making use of alternative products or services offered by the organisation
- (ii) making an exception to the service you would normally offer

Element 3: Develop the relationship between your customers**A. Identify new ways of helping your customers by:**

- (i) making use of alternative products or services offered by the organisation
- (ii) making an exception to the service you would normally offer

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any; customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communications

9. How would you communicate in a clear, polite, confident way and why this is important.
10. How to deal with persons with diverse backgrounds and abilities (e.g. age, cultural, social and religious backgrounds).

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

Additional knowledge and understanding for Unit 3

11. How your behaviour will affect the behaviour of your customer.
12. How to behave assertively and professionally in times of conflict.
13. How to diffuse potentially stressful situations.
14. The limitations of what you are able to offer your customer.
15. How your customers' needs and expectations may change as they deal with your organisation.
16. The implications to your organisation in terms of resources and cost when you meet your customers' needs.
17. Who you will need to negotiate with to find a solution.

EVIDENCE GUIDE**1. Critical Aspects of Evidence**

You must prove that you have been working to improve your own and your organisation's relationships with your customers.

You must produce evidence that show you have done this over a period of time with different customers on different occasions.

2. Methods of Assessment**Performance Evidence**

You must include evidence that shows how you have achieved this unit:

- a. through your own individual efforts
- b. by working with others

The communication you have with your customer may be written, verbal or in some other form, e.g. sign language.

Evidence of meeting the needs and expectations of your customer and your organisation must include actions you have taken:

- c. without being asked
- d. at your customers' request

To overcome conflict between your customer and your organisation you must show that you have:

- a. made use of alternative products or services offered by the organisation
- b. made an exception to the service you would normally offer

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Performance Evidence for this unit could include:

- Observation reports by your assessor recording how you are able to use your communication skills to build customer relationships.
- Witness testimonies from managers or colleagues from your own and other departments which describe how you have provided them with a consistently high level of customer service over a period of time.

Supplementary Evidence for this unit could include:

- A professional discussion with your assessor using examples of how you have developed customer relationships by overcoming problems.
- Case histories which describe situations you have dealt with when there was a conflict between the needs of your customer and your organisation.
- Copies of records which show customers' loyalty as a result of your own efforts.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal and external to the organisation or a combination of both.

U13102: Resolve customer service problems

Unit Descriptor:

The delivery of excellent customer service involves meeting and exceeding customer expectations.

However, even if your customer service overall is excellent, some customers will experience problems. Part of your job is to help to resolve those problems.

Some problems are reported by customers. In other situations, you spot the problem first and resolve it before your customer has even noticed that there might be a problem.

For this unit you need to resolve both types of problems having looked at all the options.

This unit is particularly important to customer service because many customers judge the customer service of your organisation by the way in which their problems are resolved.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following

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| 1. Identify customer service problems | 1.1 | Gather and interpret information from your customers about problems they have raised. |
| | 1.2 | Ask your customers appropriate questions to check your understanding of their problems. |
| | 1.3 | Identify repeated problems and alert the appropriate authority. |
| | 1.4 | Share customer feedback with others to help identify potential problems before they occur. |
| | 1.5 | Work independently or with others to identify problems with systems and procedures before they begin to affect your customers. |

2. Select the best solution to resolve customer service problems
 - 2.1 Identify the available options for resolving customer service **problems**.
 - 2.2 Consult with others to identify and confirm the options available to resolve those problems.
 - 2.3 Work out the advantages and disadvantages of each option for your customer and your organisation.
 - 2.4 Select the best overall option for your customer and your organisation.
 - 2.5 Suggest to your customer other ways that problems may be resolved if you are unable to help.

3. Implement the solution to customer service problems
 - 3.1 Discuss and agree the proposed option for solving the **problem** with your customers.
 - 3.2 Take action to implement the option agreed with your customers.
 - 3.3 Work with others and your customers to make sure that any commitments related to solving the problems are kept.
 - 3.4 **Keep your customers fully informed** about what is happening to resolve the problems.
 - 3.5 Check with your customers to make sure the problem has been resolved to their satisfaction.
 - 3.6 Give clear reasons to your customers when the problem has not been resolved to their satisfaction.

RANGE STATEMENT

You must cover the items below:

Element 1: Identify customer service problems**A. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

Element 2: Select the best solution to resolve customer service problems**A. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer.
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

Element 3: Implement the solution to customer service problems**A. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

B. Keep your customers fully informed by:

- (i) supplying relevant information tactfully when customers have requested it
- (ii) supplying relevant information tactfully when customers have not requested it

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

Additional Knowledge and understanding for Unit 4

10. What are the organisational procedures and systems for dealing with customer service problems.

11. What are the limitations of what you are able to offer your customer.

12. How to defuse potentially stressful situations.

13. How to negotiate.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

You must prove that you have dealt effectively with a series of customer service problems. You must produce evidence that shows you have done this over a period of time with different customers on different occasions.

Performance Evidence

Your evidence must include examples of solving problems involving **each** of the following:

- a. problems first identified by customers
- b. problems that you have identified before they affect your customer
- c. problems due to differences between your customers' expectations and what your organisation can offer
- d. problems due to a system or produce failure
- e. problems due to a lack of resources or human error

Your evidence will need to show that you:

- f. have made positive efforts to keep your customers informed at all times while problems are being solved
- g. supplied relevant information tactfully when customers have requested it
- h. supplied relevant information tactfully when customers have not requested it
- i. have used agreed organisational procedures when solving problems
- j. have made exceptions to usual practice with the agreement of others

All options you have considered must be based on the existing products or services offered by your organisation.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

2. Methods of Assessment

Your customers can be internal or external to the organisation or a combination of both. The communication you have with your customer may be written, verbal or in some other form.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Occasions when a system or procedure has failed for example, relate to a network failure; computer breakdown; till/credit card machine problems; goods not delivered on time; somebody else has not passed information on.

Performance Evidence for this unit could include:

- Witness testimonies from managers or others describing how you have been able to effectively deal with a series of customers' problems over a period of time.
- Observation report by your assessor describing how you were able to sort out a customer's problem by gathering information and offering a range of options.

Supplementary Evidence for this unit could include:

- A case history which describes when you noticed that the same problem kept occurring and what action you took.
- A case history which describes how you identified a re-occurring problem and what action you took.
- Case histories which describe how you identified, solved and implemented solutions to internal or external customers' problems.
- A professional discussion with your assessor using examples of problems you have resolved before they could affect customers.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace.

U00306: Maintain a safe and secure working environment

Unit Descriptor:

This unit describes the competence required to contribute to maintaining a safe and secure working environment.

The unit addresses the essential abilities of:

- Communicating effectively
- Working in a safe and hygienic manner
- Problem solving
- Keeping records
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

1. Maintain personal health and hygiene	1.1 Clean, smart and appropriate clothing is worn. 1.2 Hair is neat and tidy and worn in accordance with organisational requirements. 1.3 Jewellery, perfume and cosmetics are worn in line with organisational requirements. 1.4 Cuts, grazes and wounds are correctly treated by the appropriate person. 1.5 Illness and infections are reported promptly to the appropriate person. 1.6 All work is carried out in accordance with hygiene practices that must be adhered to within the working environment.
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- 1.7 All work is carried out in an efficient and organised manner in accordance with appropriate organisational procedures and **legal requirements**.
2. Carry out procedures in the event of a fire
- 2.1 In the event of a **fire**, the alarm is raised immediately.
- 2.2 **Fire fighting equipment** is correctly used in accordance with manufacturer's instructions and organisation's procedures.
- 2.3 All safety and emergency signs and notices are adhered to.
- 2.4 Correct evacuation procedures are followed in a calm, orderly manner and in accordance with organisational procedures.
- 2.5 Designated assembly points are reached and registration done.
- 2.6 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
- 2.7 All work is carried out in an organised and efficient manner in accordance with safety and health **regulations** and organisational procedures.
3. Dealing with the discovery of suspicious items/packages
- 3.1 **Suspicious items and packages** are left untouched.
- 3.2 Suspicious items and packages are reported in accordance with organisational procedures.
- 3.3 Correct safety and security procedures are followed in calm and orderly manner and in accordance with organisational procedures.

- 3.4 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
- 3.5 All work is carried out in an organised and efficient manner in accordance with safety and health **regulations** and organisational procedures.
- 4. Carry out procedures in the event of an accident
 - 4.1 In the event of an **accident, basic first aid** is performed following recommended procedures.
 - 4.2 Assistance from the appropriate **person responsible** for first aid is sought immediately.
 - 4.3 Emergency services are contacted in accordance with organisational procedures.
 - 4.4 **Appropriate action** is taken to ensure safety of injured and uninjured persons.
 - 4.5 Comfort and reassurance are given to injured persons.
 - 4.6 Accidents are reported and documented in accordance with organisational procedures.
 - 4.7 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
 - 4.8 All work is carried out in an organised and efficient manner in accordance with safety and health **regulations** and organisational procedures.

5. Maintain a safe work environment for customers, staff and visitors
- 5.1 **Hazards and potential hazards** to the safety of customers, staff and visitors are promptly identified and rectified.
 - 5.2 Customers, staff and visitors are made aware of all hazards and potential hazards in accordance the organisaional with procedures.
 - 5.3 Cautionary measures are taken to warn customers, staff and visitors of hazards and potential hazards.
 - 5.4 **Accidents**, damage and non-rectifiable hazards are reported promptly to the appropriate person.
 - 5.5 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
 - 5.6 All work is carried out in an organised and efficient manner in accordance with safety and health **regulations** and organisational procedures.
6. Maintain a secure work environment for customers, staff and visitors
- 6.1 Potential **security risks** are identified and reported to the appropriate person in accordance with organisational procedures.
 - 6.2 **Customer and staff areas** are correctly secured against unauthorized access.
 - 6.3 All establishment **storage and security facilities** are secured against unauthorized access.
 - 6.4 Establishment, staff or customer lost property is promptly reported to the appropriate person.
 - 6.5 Suspicious individuals are politely challenged or reported promptly to the appropriate person.

- 6.6 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
- 6.7 All work is carried out in an organised and efficient manner in accordance with safety and health **regulations** and organisational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Maintain personal health and hygiene**A. Legal requirements:**

- (i) current relevant legislation relating to safe and hygienic working practices

Element 2: Carry out procedures in the event of a fire**A. Fire**

- (i) all types of fires

B. Fire Fighting Equipment

- (i) fire hose
- (ii) fire blanket
- (iii) foam extinguisher
- (iv) water extinguisher
- (v) sand
- (vi) wet blanket
- (vii) carbon dioxide extinguisher

C. Regulations

- (i) legislation
- (ii) manufacturer
- (iii) supplier

RANGE STATEMENT (continued)

You must cover the items below:

Element 3: Deal with the discovery of suspicious items/packages**A. Suspicious items and packages**

- (i) all unattended bags, packages and parcels
- (ii) unusual and unaccounted for deliveries

B. Regulations

- (i) legislation
- (ii) organisational

Element 4: Carry out procedures in the event of an accident**A. Accidents: *(Also applies to element 5)***

- (i) all accidents involving injury

B. Basic first aid application

- (i) bandaging
- (ii) cold pack
- (iii) Heimlich manoeuvre

C. Appropriate action

- (i) removing and lifting injured person
- (ii) rendering basic first aid

D. Responsible person

- (i) company nurse
- (ii) safety officer

RANGE STATEMENT (continued)

You must cover the items below:

E. Regulations

- (i) legislation
- (ii) manufacturer
- (iii) organisational

Element 5: Maintain a safe work environment for customers, staff and visitors**A. Hazards and potential hazards**

- (i) suspicious items
- (ii) areas and incidents which threaten the safety of customers, staff and visitors

C. Regulations

- (i) current relevant legislation relating to safe and hygienic working practices when maintaining a safe environment for customers, staff and visitors
- (ii) manufacturer
- (iii) supplier

Element 6: Maintain a secure environment for customers, staff and visitors**A. Security risks**

- (i) prohibited areas
- (ii) suspicious items
- (iii) unauthorized open entrances/exits
- (iv) missing keys

B. Customer and staff areas

- (i) public facilities
- (ii) public areas
- (iii) work areas
- (iv) staff facilities

RANGE STATEMENT (continued)

You must cover the items below:

C. Storage and security facilities

- (i) storerooms
- (ii) safes
- (iii) cash boxes

D. Regulations

- (i) current relevant legislation relating to safe and hygienic working practices when maintaining a secure environment for customers, staff and visitors.

UNDERPINNING KNOWLEDGE

You need to understand:

Health and Safety

1. Why it is important to comply with health and safety legislation.
2. Where and from whom information on current health and safety legislation can be obtained.
3. What general hygienic practices must be adhered to in own work environment.
4. Why the correct clothing, footwear and headgear should be worn at all times.
5. Why and to whom illness and infections should be reported.
6. Why it is important to maintain good personal hygiene.
7. What the possible causes are of fire in the working environment.
8. What preventative actions can be taken to minimise risk of fire.
9. What organisational procedures should be followed in the event of fire.
10. Where alarms are located and how to activate them.
11. Why a fire should never be approached unless it is safe to do so.
12. Why suspicious items and packages should be left untouched.
13. Why suspicious items and packages should be reported.
14. What basic first aid should be applied in the event of an accident.
15. Who is the person responsible for first aid.
16. What emergency services are available in the event of an accident and why it is important to contact them.
17. What action should be taken to ensure the safety of the injured and uninjured.
18. What are the organisational procedures for reporting an accident.
19. What cautionary measures can be taken to warn customers, staff and visitors of potential hazards.
20. What the potential hazards are within own working environment.
21. Why suspicious items and packages must not be approached or tampered with.
22. Where first aid equipment and the accident register are located.
23. Why it is important to use correct lifting techniques.
24. What the employee's responsibility is in relation to health and safety regulations.

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

25. Which keys, property and areas should be secured from unauthorised access at all times.
26. Why it is essential to be aware of potential security risks.
27. Why procedures relating to lost property must be adhered to.

Communication

28. Why only disclosable information should be given to customers.
29. Why it is important to report all unusual/non-routine incidents to the appropriate person.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

Performance evidence is also required for performance criteria 2 and 3 of Element 5. 6 showing evidence of dealing with at least one type of **security risk**; working in two types of **customer and staff areas**; and dealing with two types of **storage and security facilities**.

For all other performance criteria and ranges a combination of performance evidence and supplementary evidence for example questioning, witness testimony, case histories can be used to provide evidence.

Underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

2. Methods of Assessment

Performance evidence for this unit could include:

- Observation reports from your assessor
- Photographs of yourself at work
- Entries made by you into the organisation's incident book.
- Correspondence written by you drawing attention to health and safety issues.

Supplementary evidence for this unit could include:

- Witness testimony from customers and line managers
- Personal statements from yourself describing how you carry out your duties
- Answers to oral or written questions.

3. Context of Assessment

Evidence of competence should be demonstrated totally through performance evidence if possible.

Simulation may be used to provide performance evidence for Elements 5.2, 5.3 and 5.4.

At a minimum, performance evidence must be provided to cover performance criteria 1-3 of Element

U13202: Support customer service improvements

Unit Descriptor:

If you have chosen this unit your organisation should be encouraging you to get involved with making changes to improve customer service.

Organisations change the way they deliver service to their customers because customer expectations rise and other organisations improve the services they offer.

Your job involves delivering customer service. If your organisation has decided to make changes it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

In this unit you need to show how you provide support for changes that your organisation has introduced. In addition, you need to present your own ideas for improvements to someone in your organisation who will be able to judge whether your idea has possibilities for change and improvement.

ELEMENT	PERFORMANCE CRITERIA
1. Use feedback to identify potential customer service improvements	<i>To be competent you must achieve the following:</i>
	1.1 Gather informal feedback from your customers when you deal with them.
	1.2 Use agreed customer feedback procedures to obtain information from your customers on their needs and expectations.
	1.3 Use the information obtained from your customers to develop a better understanding of their needs and expectations.
1.4 Identify ways the service you give your customers could be improved based on the information you have gathered.	

- 1.5 Discuss your ideas for improving customer service with others and make recommendations.
2. Contribute to the implementation and evaluation of changes in customer service
 - 2.1 Identify possible **changes** that could be made to improve the service you give to your customers.
 - 2.2 Present your idea for improving the service you give to the appropriate authority.
 - 2.3 Carry out agreed changes to customer service systems and procedures.
 - 2.4 Keep your customers informed of changes to customer service.
 - 2.5 Discuss with others how changes to customer service are working.
 - 2.6 Work with others to identify the negative aspects of change and how these can be resolved.
 - 2.7 Work positively with others to support the changes made by your organisation.

RANGE STATEMENT

You must cover the items below:

Element 1: Use feedback to identify potential customer service improvements

A. Types of feedback:

- (i) solicited
- (ii) unsolicited

Element 2: Contribute to the implementation and evaluation of changes in customer service

A. Changes:

- (i) change in the products or services offered by your organisation
- (ii) change in how products or services are supplied
- (iii) changes in the ways in which you and your colleagues behave when delivering products or services

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

Additional knowledge and understanding you need for unit 6

10. How the consumer experience is influenced by the way service is delivered.
11. How customer feedback from customers is obtained.
12. How to work with others to identify and support change in the way service is delivered.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

You must prove that you have worked to support customer service improvement initiatives within your organisation.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Performance Evidence

You must also show that you:

- a. have supported improvements to customer service over a period of time.
- b. have made positive contributions to improving customer service through both your individual efforts and by working with others

Your evidence is likely to result from two or three changes with which you have been actively involved. In each case you must be able to identify the part you played in:

- c) collecting customer feedback and linking it to change
- d) implementing the change
- e) gathering customer reactions to change

Your evidence will also need to show:

- f) how the changes have improved customer service
- g) how your customers have reacted to the changes

2. Methods of Assessment

Your customers can be internal or external to the organisation or a combination of both.

The changes which form the basis of your evidence may be either: changes in the products or services offered by your organisation; or changes in how products or services are supplied; or changes in how you and your colleagues behave when delivering products or services.

Performance Evidence for this unit could include:

- Case histories which describe how you have been actively involved in collecting customer feedback.
- Copies of completed questionnaires of other types of customer feedback which you have played an active part in sending out and collecting.

Supplementary Evidence for this unit could include:

- Witness testimonies from managers that provide evidence of how you were able to analyse and report back on the findings of a customer service feedback project.
- Copies of reports you have produced which demonstrate how you were able to draw conclusions and make recommendations based on customer feedback.
- Copies of minutes of meetings which you were involved in where you put forward ideas for improvements in customer service.
- A case history describing how you were involved in evaluating a new change to customer service.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace.

U13302:**Develop personal performance through delivering customer service**

Unit Descriptor:

If you have chosen this optional unit it is because you are keen to develop your own personal performance and competence.

This unit is all about how you improve your customer service performance alongside the development of your personal skills.

To do this you will need to plan together with a manager or mentor and then carry out activities which help you learn and develop in your customer service role.

This is an important part of proving that you can deliver effective and excellent customer service. Remember that customer service improvements rely on continuous improvement and this includes improving your skills as well as your product and service knowledge.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|---|
| 1. Review performance in your customer service role | 1.1 Work with an appropriate person to establish what you need to know and be able to do the work effectively in your customer service role. |
| | 1.2 Identify and review situations from your own satisfactory and unsatisfactory customer service experience. |
| | 1.3 Review the impact of your own behaviour in customer service situation. |
| | 1.4 Carry out a self-assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs. |

2. Prepare a personal development plan and keep it up to date
 - 2.1 Identify your strengths, weaknesses and development needs with an **appropriate person**.
 - 2.2 Work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role.
 - 2.3 Construct a customer service **personal development plan** to progress towards your personal development objectives.
 - 2.4 Regularly review your progress against your objectives with an appropriate person.
3. Undertake development activities and obtain feedback on your customer service performance
 - 3.1 Complete development activities as identified in your customer service personal development plan.
 - 3.2 Use your day-to-day experiences with your customers to develop your customer service performance.
 - 3.3 Obtain feedback from an **appropriate person** on the achievement of your customer service development objectives.
 - 3.4 Review and update your customer service personal development plan.

RANGE STATEMENT

You must cover the items below:

Element 1: Review performance in your customer service role**A. Appropriate person: (Also in Elements 2 and 3)**

- (i) the person to whom you report
- (ii) assigned colleagues
- (iii) your assessor
- (iv) someone from your training/personnel department

Element 2: Prepare a personal development plan and keep it up to date**A. Personal development plans should contain:**

- (i) information about the knowledge and skills relevant to your customer service role
- (ii) your own preferences for methods of learning
- (iii) your workload
- (iv) opportunities for learning on the job

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.
10. Organisational systems and procedures for developing your personal performance in customer service.
11. How your behaviour has an effect on the behaviour of others.

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

Additional knowledge and understanding you will need for Unit 7

12. How effective learning depends on a process of planning, doing and reviewing.
13. How to review effectively your personal strengths and development needs.
14. How to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service.
15. How to access sources of information and support for your learning.
16. How to obtain useful and constructive personal feedback from others.
17. How to respond positively to personal feedback.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

You must prove that you have actively sought feedback from an appropriate person to assess your personal strengths and development needs.

You must prove that you have constructed your personal development plan taking account of:

- a. information about the knowledge and skills relevant to your customer service role
- b. your own preferences for methods of learning
- c. your workload
- d. opportunities for learning on the job

You must prove that you have applied your learning to improve customer service, reviewed the results and used this information to update your personal development plan.

Your personal development plan must be put into writing and confirmed by an appropriate person.

Your evidence must show that you have made reference to the knowledge and understanding requirements when you are constructing your personal development plan.

2. Methods of Assessment

Performance Evidence for this unit could include:

- Witness testimony from an appropriate person which provides evidence that you have actively sought feedback on your development needs.
- Copy of a self assessment which identifies the strengths and weaknesses of your customer service skills and knowledge.
- Copies of appraisals or reviews which relate to developing your customer service skills.
- Copy of a personal development plan which identifies activities that need to be undertaken to improve your customer service skills.
- A professional discussion with your assessor using examples of how you have been able to improve your customer service skills and update your personal development plan.

3. Context of Assessment

You must supply all of the evidence for this unit from your working environment and all of your development activities should take place in the context of your organisation.

U13402 Promote additional products or services to customers

Unit Descriptor:

If you have chosen this unit your job must involve opportunities to encourage customers to use more of your organisation's products or services.

Products or services are continually changing in organisations to keep up with customers' needs and expectations and your organisation must promote these to be able to survive in a competitive marketplace.

Also, your customers will expect more and more products or services to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation to give them a greater choice.

Because of this everybody delivering products or services needs to play a part in making customers aware of what is available as well as encouraging them to come back for more.

This unit deals with the way you promote products or services to your customers to extend their use of your organisation.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Identify additional products or services that are available | 1.1 Work with others to keep your information regarding your organisation's products or services up to date. |
| | 1.2 Check with others when you are unsure of new product or service details. |
| | 1.3 Identify appropriate products or services that may match individual customers needs. |
| | 1.4 Spot opportunities for offering customers additional products or services that might improve their customer experience. |

- | | |
|--|---|
| 2. Inform customers about additional products or services | 2.1 Choose the most appropriate time to inform your customers about additional products or services . |
| | 2.2 Choose the most appropriate method of communication to introduce your customers to additional products or services. |
| | 2.3 Give your customers accurate and sufficient information to enable them to make a decision about the additional products or services. |
| | 2.4 Give your customers the time to ask questions about the additional products or services and respond with appropriate and accurate information. |
| 3. Gain customer commitment to using additional products or services | 3.1 Close the discussion appropriately if your customers show no interest. |
| | 3.2 Give relevant information to move the situation forward when your customers show interest. |
| | 3.3 Secure customer agreement and check customer understanding regarding the delivery of the product or service. |
| | 3.4 Take action to ensure prompt delivery of the additional products or services to your customers by your organisation. |
| | 3.5 Refer your customers to others or to alternative sources of information if the additional products or services are not ones you are responsible to deal with. |

RANGE STATEMENT

You must cover the items below;

Element 1: Identify additional products or services that are available**A. Additional products or services: (*Also applies to Elements 2 and 3*)**

- (i) use of products or services which are new to your customer
- (ii) more use of the same products or services your customer has used before

Element 2: Inform customers about additional products or services**A. Information:**

- (i) verbal
- (ii) written

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

Additional knowledge and understanding you will need for Unit 8

10. What are the organisational procedures and systems for encouraging the use of additional products or services.
11. How would the use of additional products or services benefit your customers.
12. How would the customers' use of additional products or services benefit your organisation.
13. What are the main factors that influence customers to use your products or services.
14. How would you introduce additional products or services to customers outlining their benefits, overcoming reservations and agreeing to provide the additional products or services.
15. How would you give appropriate, balanced information to customers about products or services.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

The additional products or services you offer **must** include:

- a. use of products or services which are new to your customer
- b. more use of the same products or services your customer has used before

You must prove that you:

- c. regularly follow agreed organisational procedures for offering additional products or services to your customers
- d. create your own opportunities for encouraging your customers to use additional products or services
- e. identify what your customer wants by seeking information directly and by collecting information from spontaneous customer comments

The information you provide to your customers may be given verbally or in writing.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

2. Methods of Assessment

The products or services outside of your own area of responsibility may include: those offered by other sections of your organisation; or products or services that you have not supplied before.

Performance Evidence for this unit could include:

- Observation reports from your assessor recording how you have been able to appropriately inform customers of additional products or services.
- Witness testimony from an appropriate person which provides evidence that you are able to secure a customer's commitment to use additional products or services.

Supplementary Evidence for this unit could include:

- Case histories which describe situations where you have been able to gain the commitment of customers to use products or services they had not used before.
- Copies of reports or transaction statistics which show how you have contributed to the additional use of products and services by your customers.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal or external to the organisation or a combination of both.

U13502**Process customer service information**

Unit Descriptor:

If you have chosen this optional unit your job must involve collecting and handling significant amounts of customer information.

You and your organisation need customer information to answer customer questions and respond to customer requests.

Your job may involve collecting customer information by actively asking for it from your customers. Alternatively, the systems and equipment that you operate may collect it for you. In either case you must collect the information, retrieve it and supply it when needed.

Good customer information provides a sound basis for all customer service transactions and this unit gives you the opportunity to show how your handling of that information contributes to delivering excellent customer service.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Collect, update and store customer service information | 1.1 Collect and record new customer service information from your customers in accordance with organisational guidelines.

1.2 Update existing customer service information with additional information received from your customers.

1.3 Record customer service information that is accurate, sufficient and relevant to the purpose for which it is needed.

1.4 Confirm the accuracy of information with your customers before it is recorded. |
|---|--|

2. Select, retrieve and supply customer service information
- 1.5 Store customer service information where it is accessible to those who need it.
 - 2.1 Respond promptly to requests for customer service **information**.
 - 2.2 Select and retrieve information that helps those who need it.
 - 2.3 Retrieve customer service information in accordance with organisational guidelines, accuracy, format and confidentiality.
 - 2.4 Supply accurate and sufficient customer service information to meet your customers' requests.
 - 2.5 Choose the most appropriate way to **supply information** to your customers.
 - 2.6 Confirm that your customers receive and understand all the customer service information you have supplied.
 - 2.7 Maintain the confidentiality of personal information in accordance with organisational guidelines and relevant legislation.

RANGE STATEMENT

You must cover the items below:

Element 1: Collect, update and store customer service information**A. Information for:**

- (i) new customers
- (ii) customers whose records need updating

Element 2: Select, retrieve and supply customer service information**A. Information for:**

- (i) customers
- (ii) others

B. Supply information:

- (i) in writing
- (ii) verbally
- (iii) electronically
- (iv) using images

UNDERPINNING KNOWLEDGE

You need to understand:

Legislation and regulations

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any, customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

Additional knowledge and understanding you need for unit 9

10. What are the organisational procedures and systems for collecting, retrieving and supplying customer service information.
11. How would you collect customer service information efficiently and effectively.
12. How do you operate the customer information storage system.
13. Why does processing customer information correctly make an important contribution to effective customer service.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

You will need to show that you have collected, selected, retrieved and supplied customer service information over a period of time.

Performance Evidence

You must prove that you have processed customer information for a variety of customers with different needs.

You must show that you have processed information for:

- a. customers
- b. others

You must also show that you have:

- c. checked whether the information you are collecting and retrieving is accurate and up-to-date
- d. selected from a variety of information the parts that apply directly to each of your customers.

The information you supply can be in writing, verbally, electronically or by using images.

Your evidence must show that you have applied the knowledge and understanding requirements when you are processing customer service information.

2. Methods of Assessment

Performance Evidence for this unit could include:

- Observation report by your assessor recording how you are able to meet your customers' requests by selecting and retrieving accurate and sufficient information.
- Witness testimony from an appropriate person which provides evidence that you can effectively collect accurate customer service information.

Supplementary Evidence for this unit could include:

- Copies of records of customer information you have collected.
- Copies of communications sent in response to customers' requests.
- A professional discussion with your assessor using examples of different ways you have supplied information to various customers over a period of time.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal or external to the organisation or a combination of both.

Organisations use different methods to store information including manual files and computerized storage. Your evidence must be demonstrated by using the method which is most appropriate for your organisation.