

## CFACSF2 (SQA Unit Code – H9YX 04)

### Deliver customer service within the rules



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#### Overview

This standard is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This standard requires you to show that you know and understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

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#### Performance criteria

#### Follow your organisation's customer service practices and procedures

*You must be able to:*

- P1 follow organisational practices and procedures that relate to your customer service work
- P2 recognise the limits of what you are allowed to do when delivering customer service
- P3 refer to somebody in authority when you need to
- P4 work in a way that protects the security of customers and their property
- P5 work in a way that protects the security of data relating to customers

#### Follow legislation and external regulation that relate to customer service

*You must be able to:*

- P6 work in a way that is safe for your customers and your colleagues
- P7 treat customers equally
- P8 respect confidentiality relating to customers and the organisation
- P9 work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- P10 work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not

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#### Knowledge and understanding

*You need to know and understand:*

- K1 organisational practices and procedures that relate to your customer service work
- K2 the limits of what you are allowed to do when delivering customer service
- K3 when and how you should refer to somebody in authority about the rules for delivering customer service
- K4 how you protect the security of customers and their property
- K5 how you protect the security of information about customers
- K6 your health and safety responsibilities as they relate to your customer service work
- K7 your responsibilities to deliver customer service whilst treating customers equally
- K8 why it is important to respect customer and organisation confidentiality
- K9 the main things you must do and not do in your job under legislation that affects your customer service work
- K10 the main things that you must do and not do in your job under external regulations that affect your customer service work

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### SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website [www.sqa.org.uk](http://www.sqa.org.uk)

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**Originating organisation** Skills CFA

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**Original URN** CFACSF2

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**Relevant occupations** Customer Service Occupations

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**Suite**

Customer Service (2013)

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**Key words**

Industry; rules; legislation; customer service; organisational practices; organisation procedures; security; delivery; health; safety; external regulations; equality; confidentiality