

National Unit Specification: general information

UNIT Customer Care (Access 2)

CODE DV2Y 08

SUMMARY

This Unit will be suitable for candidates who are developing the skills needed to deal with customers effectively. This Unit helps candidates to develop good communication and interpersonal skills. This Unit forms part of the Skillstart Group Award, but may also be taken as a free-standing Unit.

OUTCOMES

- 1 Demonstrate appropriate behaviours in dealing with a customer.
- 2 Identify the needs of an individual customer.
- 3 Identify the steps in dealing with a customer complaint.

RECOMMENDED ENTRY

Entry to this Unit is at the discretion of the centre.

CREDIT VALUE

1 credit at Access 2 level (6 SCQF credit points at SCQF level 2*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates*

Administrative Information

Superclass: HC

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National Unit Specification: general information (cont)

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CORE SKILLS

There are no Core Skills for this Unit.

National Unit Specification: statement of standards

UNIT Customer Care (Access 2)

Acceptable performance in this Unit will be the satisfactory achievement of the standards set out in this part of the Unit Specification. All sections of the statement of standards are mandatory and cannot be altered without reference to the Scottish Qualifications Authority.

OUTCOME 1

Demonstrate appropriate behaviours in dealing with a customer

Performance Criteria

- (a) The importance of the individual customer is clearly explained.
- (b) The customer is greeted politely.
- (c) Courteous and helpful behaviour is shown to the customer.
- (d) Appropriate body language is used.

Evidence Requirements

For PC(a) Written and/or oral evidence to show that the candidate can clearly explain the importance of the individual customer.

For PCs (b) to (d) performance evidence to show that the candidate can greet the customer politely, show courteous and helpful behaviour to the customer and use appropriate body language.

OUTCOME 2

Identify the needs of an individual customer

Performance Criteria

- (a) Listen carefully to the needs of the customer.
- (b) Establish the needs of the customer.
- (c) The customer's needs are checked.
- (d) The customer's needs are dealt with in an appropriate manner.

Evidence Requirements

Performance evidence to show that the candidate can listen carefully to the customer and repeat back to the customer what the customer's needs are to check that the needs of the customer have been understood and to deal with these needs in an appropriate manner.

National Unit Specification: statement of standards (cont)

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OUTCOME 3

Identify the steps to deal with an individual customer complaint

Performance Criteria

- (a) Identify the individual's role in dealing with a customer complaint.
- (b) Identify clearly the customer's complaint.
- (c) Identify the steps needed to handle the customer complaint appropriately.

Evidence Requirements

Written and/or oral evidence to show that the candidate can identify his/her role in dealing with a customer complaint, can identify clearly the customer complaint and can identify the steps needed to handle the customer complaint appropriately

National Unit Specification: support notes

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This part of the Unit Specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

GUIDANCE ON THE CONTENT AND CONTEXT FOR THIS UNIT

This Unit is designed to introduce candidates to the skills needed to deal with customers effectively and to develop an awareness of the vital role that customers play in any organisation and that handling customers and customer care are crucial parts of the everyday functions of any organisation.

The candidate will be introduced to the skills of communication used in greeting customers (using customers' names where appropriate), establishing and maintaining a relationship with a customer, establishing the customer's needs, identifying a complaint, and identifying how the complaint can be dealt with appropriately, which may involve referring the customer complaint to the appropriate person. The candidate should understand his or her role and responsibilities within the company and how this may impact on customers. This could be in the form of showing a customer where a product is within the store, providing him/her with information on a product or guiding the customer to where further help and advice may be sought.

The candidate must understand that communication skills involve more than spoken words. The candidate should be aware that body language: posture, facial expressions, tone of voice and speech all contribute to the message the customer receives. Candidates should be encouraged to develop their listening and questioning skills eg to understand the difference between an open and a closed question when dealing with a customer enquiry.

Candidates should be aware of different company's procedures for handling customer enquiries and complaints within an organisation and their specific roles in handling enquiries and complaints. Candidates should be made aware that when handling a customer complaint it is important to listen, apologise if required, clarify the nature of the complaint and look at possible options taking recognition of the company's procedures when handling complaints and following this through.

GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT

Candidates should be given the opportunity to work individually, in pairs or in groups depending on the activity. Wherever possible, evidence should be generated from realistic work situations or in a simulated environment. Wherever possible, candidates should be encouraged to carry out the tasks related to his or her own experience of the work related environment.

The learning and teaching approaches should be appropriate to the needs of the particular candidate. The approaches, however, should be highly practical with the emphasis on candidate-centred activity. The learning and teaching approaches used should encourage candidates to be aware of their attainment and help them to transfer the skills into other contexts.

National Unit Specification: support notes (cont)

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All learning should occur naturally in an area where the activities may be carried out with the tutor/supervisor adopting the role of the customer and the candidate that of an employee in a realistic work situation or in a simulated environment.

The practical activities should be limited to simple tasks. If the activities are not being undertaken in the workplace, they should be undertaken in a situation which recreates the conditions and demands of the workplace.

Outcome 1

PC(a)

The underpinning knowledge and understanding required for Performance Criterion (a) could be gained through group discussion and personal reflections.

Candidates could be asked to reflect on their own experiences of being a customer and could be encouraged to use their own experiences to explore the concept of good customer care. This could be explored in terms of how they were greeted and approached by the company representative, how their enquiries were dealt with and generally whether they felt their custom was valued.

Candidates could be asked to look at the numerous ways and the variety of outlets available for people to purchase similar goods or gain services. Given the variety of sources offering the same products, candidates could explore the reasons why customers go to specific companies or return to the same outlet.

PC(b), (c) and (d)

Although the candidate requires underpinning knowledge regarding the appropriate ways to deal with customers (this can be addressed through group discussions and tutor input) much of the learning will be addressed through candidates participating in simulated situations and reflecting on their own and other people's performances. Candidates should be aware that customers should be greeted politely, and that the enquiry should be handled in a friendly, helpful and courteous manner. Candidates should be made aware of how body language may affect the relationship between the employee and the customer and the manner in which the enquiry is handled.

Outcome 2

The candidate should be given opportunities to develop his or her active listening skills, either through listening to the tutor and reflecting back the content of the discussion or developing this through working in pairs by interviewing each other and presenting the information obtained to the group. Candidates need to understand the difference between listening and active listening. This will help them to understand the impact this has on any interaction when candidates are merely listening or when giving someone their full attention. Candidates could be asked to reflect on times when someone paid only slight attention to them and explore the consequences this might have if this approach were adopted when dealing with a customer. Candidates could explore their own experiences of having their needs met and could review the different ways they were dealt with and discuss the advantages and limitations of different approaches.

Although the candidate requires underpinning knowledge in regard to the appropriate ways to greet customers and deal with their needs, much of the learning will be addressed through candidates participating in simulated situations and reflecting on their own and other's performance.

National Unit Specification: support notes (cont)

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Outcome 3

PC(a)

Candidates should be made aware that each company has a different approach to handling complaints and that the role/responsibility of candidates handling complaints within an organisation may be different. Candidates should be encouraged to reflect on their own experiences and use these to gain an understanding of different approaches and the effectiveness of using different approaches in relation to good customer care. The candidate needs to understand that regardless of the company policy on customer complaints that he or she as a representative of the company should demonstrate good customer care. Candidates need to understand that there is a general format for handling complaints: they must listen to the customer, apologise for any inconvenience, clarify the complaint, look at ways to resolve the complaint (eg pass to manager/team leader, refund etc) and follow this through. The candidate needs to understand that regardless of his or her own view of the situation the customer should be dealt with courteously and in the appropriate manner.

PC(b) and (c)

Although the candidate requires underpinning knowledge regarding the appropriate ways to handle complaints (this could be addressed through both group discussions and by tutor input), much of the learning will be addressed through candidates participating in simulated situations and reflecting on their own performance and the performance of others.

GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT

Centres may use the Instruments of Assessment which are considered by teachers/lecturers to be most appropriate. Suggested assessment procedures consist of practical exercises and short answer questions. The candidate should be allowed to use his or her normal mode of communication while undertaking the assessment.

Teachers/lecturers should provide adequate opportunities for informal assessment to take place prior to candidates undertaking the formal assessment that is recorded for certification purposes.

Teachers/lecturers may give candidates advice and support during any informal assessment in order to prepare them for the formal assessment.

Practical activities should be used to gather evidence. Where necessary, a video or audio recording may be used as evidence.

Records of all assessment instruments used and evidence produced by each candidate should be retained for moderation purposes. As candidate evidence may be generated by written and/or oral and/or performance evidence for this Unit, records should be kept of candidate performance. These could be in the form of checklists and/or logs completed by a responsible person observing the performance or recording the answers to questions, or they may be in the form of video or audio recordings of candidate performance. All checklists and/or logs must be signed and dated by the teacher/lecturer who assesses the evidence and authenticates the record as an accurate record of the work of the named candidate.

All printed evidence should be signed and dated and video or audio evidence stored for moderation purposes.

National Unit Specification: support notes (cont)

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Outcome 1

PC(a) Short answer questions could be used to gather evidence for this performance criterion. Satisfactory evidence will be demonstrated by the candidate answering the questions correctly.

PC (b) — (d) Practical exercises (simulate/role plays) could be used to gather evidence for these performance criteria. Evidence should be gathered which demonstrates that the candidate can on one occasion deal with a customer, by initiating a greeting, using the appropriate body language and handling the situation courteously and appropriately.

The assessment evidence for Outcome 1 PCs(b) — (d) and Outcome 2 could be generated from one encounter (scenario/role play) to allow the candidate to demonstrate his or her ability to deal with a customer from the initial contact to the completion of the interaction.

In Outcome 2 practical exercises (simulated/role plays) could be used to gather evidence. Evidence should be gathered which demonstrates that the candidate can on one occasion identify the needs of a customer by listening carefully, clarifying the customer's requirements and dealing with the customer's needs.

Outcome 3

PC (a) Candidates could list the steps to be taken when handling a customer complaint. Satisfactory evidence will be demonstrated by the candidate listing the steps correctly. These steps should be presented in the correct order.

PC (b) and (c) Written and/or oral evidence for these Performance Criteria. Evidence should be gathered which demonstrates that the candidate can identify the customer's complaint clearly and can list the steps needed to handle the complaint appropriately.

CANDIDATES WITH ADDITIONAL SUPPORT NEEDS

This Unit Specification is intended to ensure that there are no artificial barriers to learning or assessment. The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative Outcomes for Units. For information on these, please refer to the document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (SQA, 2004).