



## National Unit specification: general information

**Unit title:** Basic Customer Service Skills (SCQF level 4)

**Unit code:** FN93 10

**Superclass:** BA

**Publication date:** July 2011

**Source:** Scottish Qualifications Authority

**Version:** 01

## Summary

This Unit is suitable for candidates interested in working with customers. It will develop candidate awareness of the importance of personal factors and product knowledge in establishing positive working relationships with customers and will enable candidates to understand how to recognise customer dissatisfaction and suggest ways of dealing with customer dissatisfaction. By the end of the Unit, candidates will have a better understanding of their own role in dealing with customers successfully and greater confidence in the process of researching a product or service to meet customer needs. They will also have a better awareness of the process of how to deal with dissatisfied customers.

## Outcomes

- 1 Describe personal factors which contribute to creating a positive impression for customers.
- 2 Identify the requirements of a customer for a product or service
- 3 Explain how to deal with customer dissatisfaction in a given setting

## Recommended entry

Entry is at the discretion of the centre.

## Credit points and level

0.5 credits at SCQF level 4 (3 SCQF credit points at SCQF level 4\*).

*\*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.*

## **National Unit specification: general information (cont)**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### **Core Skills**

Achievement of this Unit gives automatic certification of the following:

Complete Core Skills: None

Core Skills Component(s):

- Critical Thinking at SCQF level 4

There are also opportunities to develop aspects of Core Skills which are highlighted in the Support Notes of this Unit Specification

## **National Unit specification: statement of standards**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

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 SQA.

### **Outcome 1**

Describe personal factors which contribute to creating a positive impression for customers.

#### **Performance Criteria**

- (a) List the personal qualities and skills required to create a positive impression when dealing with customers
- (b) Describe the importance of these personal qualities and skills
- (c) Assess own personal qualities and skills

### **Outcome 2**

Identify the requirements of the customer for a product or service.

#### **Performance Criteria**

- (a) Describe an appropriate product/service
- (b) Describe how the chosen product/ service will be provided
- (c) Identify the customer service requirements for a chosen product/service

### **Outcome 3**

Explain how to deal with customer dissatisfaction in a given setting

#### **Performance Criteria**

- (a) Identify causes of customer dissatisfaction
- (b) Describe customer dissatisfaction in a given setting
- (c) Describe how to deal with customer dissatisfaction in a given setting
- (d) Explain the importance of dealing with customer dissatisfaction effectively, and the consequences of failing to do so

## National Unit specification: statement of standards (cont)

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### Evidence Requirements for this Unit

Evidence is required which demonstrates that candidates have achieved all Outcomes and Performance Criteria. Written and/or recorded oral evidence and product must be produced to demonstrate that the candidate has achieved all of the Outcomes and Performance Criteria.

Candidates are also required to produce a folio of evidence containing research information.

Written, portfolio, oral or performance evidence is required for this Unit.

Evidence should be gathered using a range of methods. Candidates are required to produce a folio of evidence containing research information.

### Outcome 1 — Written, portfolio, or oral evidence

Using simple research and personal assessment candidates are required to provide evidence to show that they can identify the personal qualities and skills which are required to create a positive impression when dealing with customers. For each of the qualities and skills identified candidates will provide a description of how it helps to create a positive impression for customers.

For PCs (a) and (b) candidates will provide a list which includes a minimum of **five** personal qualities and **four** skills and a description of how they contribute to creating a positive impression.

The personal qualities and skills must include the following:

- ◆ Personal appearance personal quality
- ◆ Personal hygiene personal quality
- ◆ Body language skill
- ◆ Verbal language skill
- ◆ Listening Skills skill
- ◆ Ability to work with others personal quality
- ◆ Product knowledge skill
- ◆ Time keeping personal quality
- ◆ Organised and tidy work area personal quality

PC (c) — candidates will provide a brief assessment of their own attributes for creating a positive impression with customers against the identified personal qualities and skills.

## National Unit specification: statement of standards (cont)

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### Outcome 2 — Portfolio, written and/or oral evidence

Candidates are required to provide written and/or oral evidence which includes:

For PCs (a), (b) & (c)

- ◆ A description of a product or service and its' provider
- ◆ A description of the resources needed to deliver the selected product or service including:
  - information required by the customer and where it can be found
  - time required for delivery of the product or service
  - the costs associated with the product or service

Candidates should include associated evidence, ie research information, in their portfolios

### Outcome 3 — Portfolio, written and/ or oral evidence or performance evidence

Using the same scenario as investigated in Outcome 2, candidates are required to provide written and/or oral or performance evidence which includes the following:

Pc (a)

A minimum of **three** causes of potential customer dissatisfaction from the list:

- ◆ lack of responsiveness
- ◆ poor attention to detail
- ◆ lack of product knowledge and therefore information provided
- ◆ consistently repeated mistakes
- ◆ evidence of poor training
- ◆ dissatisfaction with the actual product or service as it does not meet expectations
- ◆ competitive reason (eg price)
- ◆ poor quality or insufficient availability of resources
- ◆ any other reasonable cause

Pc (b)

A description of **one** example of customer dissatisfaction in a given setting.

Pc (c)

A description of how one example of customer dissatisfaction can be dealt with in a given setting, which must include the following:

- ◆ initial response
- ◆ what can be done within the limits of personal authority
- ◆ when to refer customer dissatisfaction to a line manager
- ◆ process for referral to line manager
- ◆ how to record instances of customer dissatisfaction

## National Unit specification: statement of standards (cont)

**Unit title:** Basic Customer Service Skills (SCQF level 4)

Pc (d)

A minimum of **three** reasons, why customer dissatisfaction should be dealt with quickly and effectively which should include:

- ◆ organisation maintains a positive reputation for dealing with complaints;
- ◆ customer feels s/he has been listened to;
- ◆ complaints indicate where training is needed and staff will benefit from additional training
- ◆ any other appropriate reason

**One** consequence, from the list, of not dealing with customer dissatisfaction appropriately, for each of the following:

- 1 the Customer
- 2 the Employee
- 3 the Organisation

- ◆ the organisation will suffer loss of current and future business;
- ◆ the customer will be annoyed when expectations are not realised;
- ◆ the customer could feel cheated and will not promote the organisation by word of mouth;
- ◆ the employee may experience stress and potential limitation of career development as the organisation fails to secure its customer base
- ◆ any other reasonable consequence

## **National Unit Specification: support notes**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

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 20 hours.

### **Guidance on the content and context for this Unit**

This Unit will help candidates to understand the importance of presenting and maintaining high personal standards when dealing with customers. Candidates will develop an understanding of the importance of product and service knowledge when dealing with customers within an organisation. They will also be introduced to ways of dealing with customer dissatisfaction and the importance of dealing with customer dissatisfaction effectively.

This Unit has been designed to allow candidates to explore the importance of customer service skills through research, discussion and/or practical participation.

#### **In relation to Outcome 1**

Anyone who works directly with customers should understand the impact that first impressions can make on new customers. It is also important to remember that maintaining a positive first impression can promote and ensure repeat and new business. These are important factors for all organisations which offer products or services.

By identifying and describing the importance of specific personal qualities and skills important to customer service, this Unit will provide candidates with knowledge and understanding which they can reflect on and apply to themselves in order to create a positive first impression.

Simple research could be carried out during visits to providers of products or services. This site based research could be complemented by accessing appropriate internet sites, brochures, pamphlets and advertising information produced by the organisation. The candidate should understand how important customer service is particularly when providing a service e.g. haircut, tourist service or hospitality service and how employee actions become part of the service product.

## **National Unit Specification: support notes (cont)**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### **In relation to Outcome 2**

Product knowledge is important for those involved in customer service and accurate and detailed knowledge of the products or services they deliver is necessary to be able to provide the best possible information and service for customers. With this in mind, in Outcome 2 candidates will be required to select a given product or service in relation to their area of study and describe its' provision. In taking a more detailed look at one particular product or service, candidates will develop specific knowledge and understanding of that particular product or service and what the requirements are of customers who wish to find out more about or purchase the product or service. A product may be a retail product such as a mobile phone, garden furniture, bicycle or any other suitable product though smaller consumable items might not be suitable for research purposes in this Unit. A service could be a holiday, a meal, the provision of transport for a group of tourists or an activity for a group of visitors.

The provision of any product or service will require resources, eg a shop with display areas for the products, brochures, salons with sinks and driers and the staff to provide information and the customer service. Resources could also be the provision of specialist equipment for climbing and sailing for a group of visitors wishing to participate in an active sport.

Depending on the product or service selected and its provider, research into the necessary resources required to deliver the product or service, will help candidates gain a better understanding of the total product or service, including the costs associated with providing it and the time it takes to deliver the product or service. This latter resource is particularly important in relation to the provision of a service and may have a greater impact on the cost of the service.

### **In relation to Outcome 3**

Customer satisfaction is very important to any organisation as a satisfied customer is likely to bring repeat business and recommend services and products to others, thus creating a broader customer base. Therefore, all employees should be aware of how to recognise when a customer is not satisfied with the service they have received — this can be straightforward and take the form of a written or verbal formal complaint, or more difficult to perceive such as a customer simply not returning and offering no comment. Additionally customer dissatisfaction might be recognised by a decrease in the level of requests for the product or service. Candidates should be encouraged to discuss all the factors which might cause customer dissatisfaction in general. They should also draw on their own experiences as well as considering potential causes of customer dissatisfaction.

As well as identifying customer dissatisfaction, it is important for candidates to understand how detrimental this can be for the organisation.



## **National Unit Specification: support notes (cont)**

### **Unit title: Basic Customer Service Skills (SCQF level 4)**

Using the same product or service researched for Outcome 2, candidates should be encouraged to discuss what might give rise to customer dissatisfaction in this setting and how they might recognise signs of customer dissatisfaction. When considering how customer dissatisfaction might be dealt with candidates could be encouraged to reflect on the impacts of their own behaviour and ability to stay calm, use of appropriate questioning and listening techniques, and ability to guess how dissatisfied customers might behave. Candidates should also discuss as a group, the less obvious signs of customer dissatisfaction such as a reduction in footfall and any non-verbal feedback indicated by customers.

### **Guidance on learning and teaching approaches for this Unit**

The design of this Unit encourages candidates to discuss, identify and reflect on the basic principles of good customer service. The research they carry out on a product or service will help them understand that customers have needs and are likely to be much more satisfied if these needs are met. Candidates should identify what resources are required to meet these needs. At all times they should be encouraged to reflect on their own role and importance in any customer transaction especially when offering a service product rather than a tangible product. Much of the learning and teaching should involve discussions and candidates drawing on their own experiences as well as sharing research findings and views. It would be of benefit to the candidates if visits to providers could be arranged but this will depend on the product or service chosen for research and might not always be applicable. However the example of providing a group of people with specialist equipment to participate in an active sport would benefit from a visit to an activity tourism provider. Guest speakers may also be appropriate to emphasise what is taught by the lecturer.

#### **Outcome 1**

Candidates should be encouraged to think about their experiences and expectations of customer service. Group discussion will be useful for the candidates to create a profile of effective customer service, personal projection, and the qualities and skills required by the individuals whose work requires them to provide a level of customer service. Candidates will gather and record information through a variety of sources, for example discussions, magazines, DVDs, guest speakers and visits to product/service providers. The use of role play is encouraged to demonstrate when a transaction was successful and when it was unsuccessful. Candidates are encouraged to have some fun while learning. The lecturer/teacher should always summarise the key learning points which should be understood by the candidates.

## National Unit Specification: support notes (cont)

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### Outcome 2

Where possible, the candidate should participate in a transaction involving the exchange of goods or services, researching it beforehand and gathering information. It would be expected that the candidates will be guided by their tutor when deciding which product or service to research.

Information can be in the form of evidence such as promotional and marketing leaflets from product/service providers or notes made by the candidate making a telephone enquiry or surfing the web. The information could also be an account of a personal fact finding visit to a product/service provider, or an account of personal experience of a selected product/service. Reference made to the time requirements associated with any product or service should identify the length of time a customer would expect to be actively involved with the organisation e.g. an hour, a day, a week.

### Outcome 3

Candidates may participate in a role play or investigate a scenario based on the research carried out in Outcome 2. A customer is clearly unhappy about the level of service received and the candidate does his/her best to address the issues. Candidates should discuss as a group why they think the customer is unhappy and suggest ways of solving the problems. They could also be given a scenario which includes evidence of a reduction in the number of people buying from or visiting the organisation and asked to comment on what might be causing it.

Another situation for role play could be given where candidates are introduced to ways of not addressing customer dissatisfaction, thus helping to develop a clearer understanding of how customer dissatisfaction might be effectively addressed. Such ways would include:

- ◆ Poor communication skills/inappropriate communication
- ◆ Poor listening skills
- ◆ Not recording details of complaint can lead to proposal of inappropriate or ineffective solutions
- ◆ Lack of detail provided to customer
- ◆ Slow response rate
- ◆ Insufficient/inappropriate training of employees
- ◆ Poor quality product
- ◆ Inclement weather
- ◆ Customer expectations were not met (why was this? Poor quality product information?)
- ◆ Financial — for example, excessive cost to service product provider
- ◆ Root of dissatisfaction is not addressed, leading to repeated complaints

The lecturer/teacher should summarise the key learning points if case studies/role play scenarios are used

## **National Unit Specification: support notes (cont)**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

### **Guidance on approaches to assessment for this Unit**

#### **Outcome 1 — Written, Portfolio or Oral and Performance**

Candidates will gather and share information on personal standards required of employees and themselves when involved in customer service provision. The evidence will be gathered in an individual portfolio under open- book conditions.

#### **Outcome 2 — Written, Portfolio or Oral or Performance**

Candidates will gather and share information on a specific product. Through research, discussion, guidance from the lecturer, and where possible practical participation, candidates should identify customer needs associated with the identified service product. The evidence will be gathered in an individual folio under open-book conditions.

#### **Outcome 3 — Written, Portfolio or Oral or Performance**

Candidates will gather and share information on customer dissatisfaction and ways of dealing with customer dissatisfaction, in relation to a given situation. The evidence will be gathered in an individual folio under open-book conditions.

### **Opportunities for the use of e-assessment**

E-assessment may be appropriate for some assessments in this Unit. By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or e-checklists. Centres which wish to use e-assessment must ensure that the national standard is applied to all candidate evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. Further advice is available in *SQA Guidelines on Online Assessment for Further Education (AA1641, March 2003)*, *SQA Guidelines on e-assessment for Schools (BD2625, June 2005)*.

### **Opportunities for developing Core Skills**

In this Unit candidates will gain a better understanding of their own role in dealing with customers successfully and greater confidence in the process of researching a product or service to meet customer needs. They will also have a greater awareness of the process of how to deal with dissatisfied customers.

Candidates will identify personal qualities and skills required for creating a positive first impression for customers and they will conduct a personal evaluation of their own attributes. They will research a product or service and identify the needs of customers for this service or product. They will identify possible causes of customer dissatisfaction and ways of dealing with the causes. Candidates will consider the negative effects of customer dissatisfaction on: the customer, the organisation and the employee respectively and consider why it is not always obvious to determine causes of dissatisfaction.

## **National Unit Specification: support notes (cont)**

**Unit title:** Basic Customer Service Skills (SCQF level 4)

As candidates are doing this Unit, they will be developing aspects of the core skills in: *Communication; Problem Solving; Numeracy, Working with Others and Information Technology*

This Unit has the Problem Solving component of Critical Thinking embedded in it, so when the candidate achieves this Unit their Core Skills profile will be updated to show they have achieved Critical Thinking at SCQF level 4.

### **Disabled candidates and/or those with additional support needs**

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering whether any reasonable adjustments may be required. Further advice can be found on our website [www.sqa.org.uk/assessmentarrangements](http://www.sqa.org.uk/assessmentarrangements)

## History of changes to Unit

Version	Description of change	Date

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