



## National Unit Specification

### General information

**Unit title:** Customer Service: Principles and Practices

**Unit code:** H315 11

**Superclass:** BA

**Publication date:** April 2013

**Source:** Scottish Qualifications Authority

**Version:** 02

### Unit purpose

This Unit is the mandatory Unit in the award in Principles of Customer Service at SCQF level 5. It is also a stand-alone Unit.

The purpose of this Unit is to develop the fundamental skills and knowledge that are essential in providing professional customer service. The Unit is suitable for learners who are employed in, or are interested in, dealing with customers effectively and is applicable across many industry sectors; a wide range of private and public organisations; as well as the voluntary sector, charities, etc

Learners who have completed the WorldHost training course entitled 'Principles of Customer Service' are well-suited to undertake this Unit.

This Unit will help learners understand the personal factors and skills required in making a positive first impression with customers and dealing with customers' needs. In particular, they will develop good communication and effective listening skills.

Learners who achieve this Unit may progress to higher level customer service and customer care Units, qualifications and awards.

### Outcomes

On successful completion of the Unit the learner will be able to:

- 1 Create a positive impression for the customer.
- 2 Deal with customer needs.

## National Unit Specification: General information (cont)

**Unit title:** Principles of Customer Service

### Credit points and level

0.50 National Unit credit at SCQF level 5: (3 SCQF credit points at SCQF level 5)

### Recommended entry to the Unit

Whilst access to this Unit is at the discretion of the centre, it would be helpful if learners have communication skills at SCQF level 4 or equivalent.

### Core Skills

Achievement of this Unit gives automatic certification of the following:

Complete Core Skill                      None

Core Skill component                      Oral Communication at SCQF level 5

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

### Context for delivery

If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

The Assessment Support Pack (ASP) for this Unit provides assessment and marking guidelines that exemplify the national standard for achievement. It is a valid, reliable and practicable assessment. Centres wishing to develop their own assessments should refer to the ASP to ensure a comparable standard. A list of existing ASPs is available to download from SQA's website (<http://www.sqa.org.uk/sqa/46233.2769.html>).

### Equality and inclusion

This Unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website [www.sqa.org.uk/assessmentarrangements](http://www.sqa.org.uk/assessmentarrangements).

## **National Unit Specification: Statement of standards**

### **Unit title:** Customer Service: Principles and Practices

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**

Create a positive impression for the customer.

#### **Performance Criteria**

- (a) Create a positive impression for the customer.
- (b) Assess own skills and personal qualities in creating a positive first impression for the customer.

#### **Outcome 2**

Deal with customer needs.

#### **Performance Criteria**

- (a) Anticipate and respond to customers' needs promptly.
- (b) Provide accurate advice and information on the product and/or service.
- (c) Explain the benefits of positive customer service.
- (d) Take action to resolve customer dissatisfaction.

#### **Evidence Requirements for this Unit**

Evidence is required to demonstrate that learners have achieved all Outcomes and Performance Criteria.

Performance evidence (which can come from the workplace or through the use of role plays, case studies, simulation, etc) is required which demonstrates that the learner has developed customer service skills and knowledge to the standard specified in the Outcomes and Performance Criteria. This must include face to face interaction.

#### **Outcome 1**

Performance evidence is required to cover creating a positive impression for the customer. However, written or oral evidence is acceptable for Performance Criteria (b), with learners assessing their own personal qualities and skills in creating a positive first impression.

#### **Outcome 2**

Performance evidence must be produced on the basis of dealing with the needs of customers and taking action to resolve customer dissatisfaction. However, written and/or oral evidence is acceptable for Performance Criteria (b) and (c), with learners providing accurate details on product and/or service and identifying benefits of effective and positive customer service.

## **National Unit Specification: Statement of standards (cont)**

**Unit title:** Customer Service: Principles and Practices

**Additional evidence required for this Unit:**

### **Skills**

Learners should provide evidence of the following skills — for use with both internal and external customers:

- ◆ An appropriate range of different types of body language
- ◆ An appropriate range of different types of communication
- ◆ Conveying information clearly
- ◆ Effective listening techniques
- ◆ Appropriate questioning techniques
- ◆ Product and/or service knowledge
- ◆ Application of appropriate current legislation

This should be performance evidence but could be supplemented through additional questioning (eg oral, written, multiple choice); portfolio of evidence or professional discussion, etc.

### **Personal Qualities**

Evidence of learner's knowledge and understanding is also required for the following personal qualities:

- ◆ Personal appearance and personal hygiene to display a positive image
- ◆ Ability to work with others
- ◆ Efficient time keeping
- ◆ Being well-organised

Learners should provide evidence of their knowledge and understanding for each of the above personal qualities



## **National Unit: Support Notes**

**Unit title:** Customer Service: Principles and Practices

Unit Support Notes are offered as guidance and 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 is suitable for a wide range of sectors — in particular retail, hospitality; travel and tourism; passenger transport; hairdressing; sport, etc

It also can span different types of organisations, eg private sector; public sector; voluntary organisations; charities, etc.

Across the Unit, learners should understand the communication process, as well as develop good communication and effective listening skills and techniques. This must cover face to face interaction but eg could also include telephone communications.

Guidance on content of Outcome 1 — 'Create a positive impression for the customer':

- ◆ Overview of importance of providing good customer service.
- ◆ Internal customers (eg colleagues; other members of the team) and external customers (eg paying customers; visitors).
- ◆ Forming positive first impressions — external factors (clothing; personal appearance, etc) and internal factors (personal biases; culture, moods; values, etc).
- ◆ Importance of both the individual and the work area being well organised, tidy and clean.
- ◆ Working effectively with others eg as part of a team; within an organisation.
- ◆ Positive attitudes to help encourage customers to return.
- ◆ Skills and techniques such as remembering and using names (including difficult to pronounce names); non-verbal techniques such as use of eye contact; distance(s); facial expressions (especially smiling); body language; gestures; posture, etc.

## National Unit: Support Notes (cont)

### Unit title: Customer Service: Principles and Practices

Guidance on content of Outcome 2 — ‘Deal with customer needs’:

- ◆ Benefits of positive customer service to the organisation (eg the cost of dissatisfied customers).
- ◆ Anticipating and responding to customer needs.
- ◆ Difference between customer needs and expectations.
- ◆ Providing positive customer service.
- ◆ Going the extra mile to help maximise repeat customers.
- ◆ Good knowledge of products and/or services.
- ◆ Awareness and application of appropriate and relevant legislation, eg return of goods; data protection, etc.
- ◆ Dealing positively with customer dissatisfaction/complaints.
- ◆ Skills and techniques such as appropriate questioning techniques; use of conversation; empathy with the customer

Learners who have undertaken the WorldHost ‘Principles of Customer Service’ training programme are well suited to the content and context of this Unit (*see Footnote 1 below*)<sup>1</sup>.

### Guidance on approaches to delivery of this Unit

This can be delivered in the workplace and/or can be delivered using a wide variety of learning and teaching approaches using combinations of participative and practical exercises (eg role plays, discussions, visits to employers etc) supported by tutor/teacher sessions for the knowledge requirements.

Where learners are in employment, the Unit could be delivered in the workplace eg with learners generating evidence in the workplace and developing a portfolio/e-portfolio of evidence (eg responses to questions and recordings of dealing with customers on a face to face basis).

The two Outcomes are very closely linked, so it is possible to deliver this Unit on a holistic basis or on an Outcome by Outcome basis, beginning with Outcome 1. But as outlined earlier, it is important that the delivery approach supports the learners’ understanding of the communication process and develops learners’ skills and techniques in communication and effective listening.

### Guidance on approaches to assessment of this Unit

Evidence can be generated using different types of instruments of assessment. The following are suggestions only. There may be other methods that would be more suitable to learners.

---

<sup>1</sup> **Footnote 1:** WorldHost is a series of training programmes adapted by People 1st to raise standards of customer service in the UK. WorldHost Principles of Customer Service is a one-day non-certificated programme providing participants with the fundamentals of customer service professionalism.

## National Unit: Support Notes (cont)

### Unit title: Customer Service: Principles and Practices

Centres are reminded that prior verification of centre devised assessments would help to ensure that the national standard is being met. Where learners experience a range of assessment methods, this helps them to develop different skills that should be transferable to work or further and higher education.

This Unit may be assessed in a variety of ways, with an integrated approach to gathering evidence encouraged, eg:

- ◆ Learners may be assessed by the use of practical exercises such as observed role play scenario(s) or as part of a training programme based on either realistic case study materials or from learners' own experience. The scenario(s) selected must be broad enough to cover all Outcomes and Performance Criteria.
- ◆ Alternatively, where the learners are in employment, performance can be observed and assessed in the workplace but again centres must ensure that all Outcomes, Performance Criteria and Evidence Requirements are covered.

Where the scenario(s) or workplace situation(s) do not cover all Evidence Requirements, then assessment can be supplemented with additional questioning (oral, written, multiple choice); the production of a portfolio; oral presentations; production of posters; professional discussions, etc.

It is also possible to assess this Unit on an Outcome by Outcome basis, eg using two different case studies or workplace situations which, where required, can be supplemented by additional methods as outlined in paragraph above to ensure all Outcomes, Performance Criteria and Evidence Requirements are covered.

Where assessment or the preparation for the assessment involves group activities, centres should ensure that candidates are individually able to provide evidence that they have covered the Performance Criteria.

Centres must ensure that evidence submitted for assessment by learners can be authenticated as their own work. There is a wide range of tools that can be used to ensure this including:

- ◆ Questioning — personal, telephone or online interview
- ◆ Written questioning
- ◆ ICT — on-line conferences, email discussions, password controlled systems, handwriting recognition, computer scanning of facial features, voice prints, finger prints, hand patterns and recognition of key board use
- ◆ Personal logs and personal statements
- ◆ Witness testimony
- ◆ Summative assessment under supervision
- ◆ Recorded evidence
- ◆ Signing and counter-signing of candidates work
- ◆ Assessment supervisors — authenticators, invigilators and mentors

More information and guidance on authentication can be found on the SQA website [www.sqa.org.uk](http://www.sqa.org.uk)

## National Unit: Support Notes (cont)

### Unit title: Customer Service: Principles and Practices

Assessment for this Unit can be contextualised for specific sectors, such as travel and tourism, retail, hospitality; passenger transport; hairdressing; sport, etc. It is also possible to contextualise assessment to organisations in public, private and voluntary sectors as well as charities, etc.

### Opportunities for 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 social software. Centres which wish to use e-assessment must ensure that the national standard is applied to all learner evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. The most up-to-date guidance on the use of e-assessment to support SQA's qualifications is available at [www.sqa.org.uk/e-assessment](http://www.sqa.org.uk/e-assessment).

### Opportunities for developing Core Skills

This Unit has the Oral Communication component embedded in it. This means that when learners achieve the Unit, their Core Skills profile will also be updated to show they have achieved Oral Communication at SCQF level 5.

There may also be opportunities to develop other Core Skills as follows:

#### Working with Others

◆ *Working Co-operatively with Others* at SCQF level 5:

General skill: In interactions, work with others co-operatively on an activity and/or activities.

In a clearly identified role, learners are to create a positive impression for customers; provide positive customer service and deal with customers' needs; show that they can work with others; offer support to others such as customers and colleagues; and they will be proactive in adapting their role as they progress through the Unit.

◆ *Reviewing Co-operative Contribution* at SCQF level 4:

General skill: review work with others in a co-operative activity and/or activities.

Learners are to assess their own skills and personal qualities in creating a positive first impression for customers. Through this they will assess their own strengths and weaknesses of contribution to co-operative working.



## National Unit: Support Notes (cont)

**Unit title:** Customer Service: Principles and Practices

### Problem Solving

- ◆ *Critical Thinking* at SCQF level 5

General skill: Analyse a situation or issue.

Learners are to identify and assess the relevance of factors involved in a wide range of situations and issues eg creating a positive first impression for customers and dealing with customers' needs. They also have to develop approaches to deal with customer dissatisfaction. In addition, they have to ensure the application of appropriate current legislation.

## General information for learners

### Unit title: Customer Service: Principles and Practices

This section will help you decide whether this is the Unit for you by explaining what the Unit is about, what you should know or be able to do before you start, what you will need to do during the Unit and opportunities for further learning and employment.

This Unit is the mandatory Unit in the award in Principles of Customer Service at SCQF level 5, however it is also a stand-alone Unit.

The purpose of this Unit is to develop skills and knowledge that are essential in providing positive professional customer service. The Unit is therefore suitable for those who already work with customers as well as those who are interested in dealing with customers effectively. This Unit is suitable for many industry sectors; private and public organisations; as well as voluntary organisations, charities, etc.

This Unit will help you to understand what's required to make a positive impression with customers and deal effectively with customers' needs. In particular, this Unit will help you to develop good communication and effective listening skills.

This Unit can be assessed in a variety of ways, eg in your workplace; practical exercises such as role plays; as part of a training programme, etc and can be based on either case studies or your work experience, etc. You may also have to provide additional evidence, such as responding to questions or developing a portfolio to ensure that you have covered all requirements of the Unit.

### Core Skills

This Unit has the Oral Communication component embedded in it, which means that if you achieve the Unit, your Core Skills profile will also be updated to show you have achieved Oral Communication at SCQF level 5.

There are also opportunities to develop the Core Skill Components in this Unit, ie *Working with Others — Working Co-operatively with Others* at SCQF level 5 and *Reviewing Co-operative Contribution* at SCQF level 4; and *Problem Solving — Critical Thinking* at SCQF level 5.

If you successfully complete this Unit, you will be able to:

- ◆ Create a positive impression for the customer
- ◆ Deal with customer needs

Where you achieve this Unit, you may progress to higher level customer service and customer care Units, qualifications and awards.

Those who have completed the one-day WorldHost training course entitled 'Principles of Customer Service' are well-suited to undertake this Unit.

## History of changes to Unit

Version	Description of change	Date
02	Core Skills Oral Communication at SCQF level 5 embedded.	09/04/2013

© Scottish Qualifications Authority 2012

This publication may be reproduced in whole or in part for educational purposes provided that no profit is derived from reproduction and that, if reproduced in part, the source is acknowledged.

Additional copies of this Unit specification can be purchased from the Scottish Qualifications Authority. Please contact the Business Development and Customer Support team, telephone 0303 333 0330.