

## National Unit Specification: General Information

<b>UNIT</b>	Customer Service (Intermediate 2)
<b>NUMBER</b>	D04H 11
<b>COURSE</b>	This is a free standing unit which may be used as part of a Scottish Group Award or be associated with other programmes of study in schools, colleges of further education or other centres.

### SUMMARY

This unit is relevant to any candidate employed in, or interested in, dealing with customers. It would be applicable broadly across the service industries.

It develops the candidate's ability to establish and maintain working relationships with a range of customers; provide information and advice to them; solve problems relating to customer dis-satisfaction and deal with customers' problems and complaints.

### OUTCOMES

- 1 Establish and maintain positive relationships with customers.
- 2 Provide information and advice to customers.
- 3 Solve incidences of customer dis-satisfaction.

### RECOMMENDED ENTRY

While entry is at the discretion of the centre, candidates may find it beneficial to have attained one of the following:

- D049 10 Basic Customer Service Skills (Intermediate 1) (x0.5)
- Standard Grade English at General level
- 7110035 Communication 2
- other relevant qualifications or experience.

### CREDIT VALUE

1 credit at Intermediate 2

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### Administrative Information

<b>Superclass:</b>	BA
<b>Publication date:</b>	December 1998
<b>Source:</b>	Scottish Qualifications Authority
<b>Version:</b>	01

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## **CORE SKILLS**

Information on the automatic certification of any core skills in this unit is published in *Automatic Certification of Core Skills in National Qualifications* (SQA, 1999).

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

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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**

Establish and maintain positive relationships with customers.

#### **Performance Criteria**

- a) Acknowledgement and greeting is pleasant and courteous and appropriate to the customer.
- b) Body language is consistent with verbal communication used.
- c) Methods and styles of communication are appropriate to particular customers.
- d) Customers' enquiries are listened to attentively.
- e) Customers' enquiries are responded to appropriately.
- f) Personal presentation and manner are consistently of a high standard.

#### **Note on range for the outcome**

Customers: internal; external; special needs; existing; new.

Methods of communication: face-to-face; phone; written; electronic.

#### **Evidence Requirements**

Performance evidence of the candidate's ability to establish positive relationships with customers to cover the full range over a period of time. This may be supported by video recordings, a teacher's/lecturer's/assessor's written comments or observation checklist and the candidate's self-appraisal sheet, witness testimony, eg. comments from the customers.

Where performance evidence is not available to cover all items in the range this should be supported by supplementary evidence in the form of written/oral questions.

Written/oral questions may also be used to ensure appropriate supporting knowledge and understanding where this is not apparent from the performance evidence:

- when and how to adapt communication to respond to the needs of different customers
- how to use and respond to verbal signals and body language
- the importance and use of active listening techniques
- the importance of first impressions and personal presentation
- how good customer service can benefit the organisation.

Knowledge evidence may be written or oral. Where oral evidence is used this must be recorded by the assessor.

## **National unit specification: statement of standards (cont)**

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### **OUTCOME 2**

Provide information and advice to customers.

#### **Performance Criteria**

- a) Customers' needs are identified and confirmed with the customer.
- b) Information sources are correctly identified and accessed.
- c) Appropriate action is taken to meet the customers' needs.
- d) Information or advice presented is correct and appropriate to the customers' needs.
- e) Information or advice is presented to the customers within agreed timescales.
- f) All details of customer contact are recorded appropriately.

#### **Note on range for the outcome**

Customers: internal; external; special needs.

Customers needs: stated; unstated; known; unknown.

#### **Evidence Requirements**

Performance evidence of the candidate's ability to provide information and advice to customers to cover the full range over a period of time. This may be supported by video-recordings, a teacher's/lecturer's/assessor's written comments or observation checklist, the candidate's self-appraisal sheet or a transcript of the information or advice given, witness testimony, eg. comments from the customers.

Where performance evidence is not available to cover all items in the range this should be supported by supplementary evidence in the form of written/oral questions.

Written/oral questions may also be used to ensure appropriate supporting knowledge and understanding where this is not apparent from the performance evidence:

- how different customers may react
- how questioning and active listening techniques may be used with different customers
- how to communicate information clearly and positively to different customers
- where and how to access relevant information.

Knowledge evidence may be written or oral. Where oral evidence is used this must be recorded by the assessor.

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

**UNIT** Customer Service (Intermediate 2)

### **OUTCOME 3**

Solve incidences of customer dis-satisfaction.

#### **Performance Criteria**

- a) The nature of the dis-satisfaction is identified and confirmed with the customers.
- b) Apologies are given for the inconvenience caused.
- c) Respect and adherence to customers' legal rights are observed.
- d) The procedure for addressing the dis-satisfaction is carried out promptly and correctly in accordance with best practice.
- e) Solutions presented are acceptable to the customers and organisation.
- f) The incidences are recorded accurately and comprehensively.

#### **Note on range for the outcome**

Dis-satisfaction: problems with product; problems with service; complaints; errors.

Procedure: handled if within own authority; referred if outwith own authority.

#### **Evidence Requirements**

Recorded evidence of the candidate's ability to solve incidences of customer dis-satisfaction to cover the full range over a period of time. This may be supported by video recordings, a teacher's/lecturer's/assessor's written comments or observation checklist or the candidate's self-appraisal sheet, witness testimony, eg. comments from the customers.

Where performance evidence is not available to cover all items in the range this should be supported by supplementary evidence in the form of written/oral questions.

Written/oral questions may also be used to ensure appropriate supporting knowledge and understanding where this is not apparent from the performance evidence:

- how to identify different types of dis-satisfaction
- how to deal with different types of angry and confused customers
- what one's own limits of authority are and how to refer problems
- customers' legal rights and the organisation's obligations.

Knowledge evidence may be written or oral. Where oral evidence is used this must be recorded by the assessor.

## National unit specification: support notes

**UNIT** Customer Service (Intermediate 2)

This part of the unit specification is offered as guidance. None of the sections of the support notes is mandatory.

### **GUIDANCE ON CONTENT AND CONTEXT**

Corresponding to outcomes 1-3:

- 1 Techniques for developing positive working relationships:
  - communication techniques - greeting, closing, building rapport, acknowledging, summarising, recapping, adapting pace and tone to customer
  - sensitive questioning techniques, adapting questioning to respond to customers feelings, methods of assisting customers with special needs (eg language differences such as English not first language, language difficulties such as hearing impairment, physical disabilities, learning difficulties)
  - behaviour techniques - recognising and responding to verbal and non-verbal signals, body language, eye contact, positioning, gestures, facial expressions
  - importance of presenting positive image, first impressions and personal presentation (behaviour, appearance, maintaining enthusiastic manner), benefits of customer care in relation to business objectives
  - dealing with stress and stressful and difficult situations.
  
- 2 Techniques for providing information and advice:
  - questioning techniques - open, leading, sensitive probing
  - effective listening techniques, interpreting customer needs, identifying signals
  - communication techniques - manner and tone of voice, use of clear language, enunciation, use of key words and phonetic language, avoiding jargon, methods of explaining information
  - formats for communication and when to use them
  - presenting information in a positive manner, identifying benefits.
  - recording methods, methods of identifying key issues or details
  - effect of actions in relation to company image and business objectives
  - techniques to manage/control communication - balancing the needs of the customer and the company, optimising call times, assertive behaviour
  - types of customer and associated behaviour, customer motives.

## National unit specification: support notes (cont)

**UNIT** Customer Service (Intermediate 2)

3 Techniques for dealing with customer dis-satisfaction:

- types of dissatisfaction and appropriate responses
- techniques for dealing with angry and confused customers, diffusing difficult situations, withstanding criticism, handling objections
- appropriate forms of communication, tone, body language
- lines of authority, when to refer
- effect of actions in relation to company image and business objectives
- appropriate legislation.

### **GUIDANCE ON TEACHING AND LEARNING APPROACHES**

The unit would best be delivered in a real workplace or in simulated workplace conditions. These could be tailored to the particular interests of the candidate group.

Within the unit, customers should refer to both internal and external customers in the widest sense of the word and could include clients, visitors, individuals, groups, known customers, new customers.

The candidate should be encouraged to develop active listening techniques and to listen attentively and respond appropriately. Customers should be encouraged to explain their problems/complaints and expansion or clarification should be sought as necessary. Throughout, the candidate should adopt a positive approach and appropriate body language. This may include smiling, nodding, etc.

Problem solving techniques should be developed throughout the delivery of the unit.

As this unit requires a high degree of one-to-one assessment small class sizes are recommended. The use of role play, video playback and self-assessment by the candidate would all be useful learning tools. These should be supported by teacher/lecturer input. Wherever possible an integrative approach should be used both within this unit and with other units.

Care should be taken to ensure that there are no artificial barriers to learning and assessment, especially for special needs groups.

### **GUIDANCE ON APPROACHES TO ASSESSMENT**

Centres may use instruments of assessment which are best suited to the needs of the particular candidate group. Wherever possible, evidence should be generated from real situations or role plays or simulations. It is expected that much of the knowledge would be evident from performance. Where this is not the case further questioning should be used to elicit evidence of underpinning knowledge and understanding. It is recommended that centres integrate assessments wherever possible.

## **National unit specification: support notes (cont)**

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### Outcome 1

Performance evidence could be gathered by observing the candidate establishing contact with a variety of customers over a period of time. The evidence should cover all the performance criteria and as much of the range as possible.

To cover any range not covered by performance and to ensure complete coverage of the underpinning knowledge and understanding written/oral answers to questions could be used.

### Outcome 2

Performance evidence could be gathered by observing the candidate giving information and advice to a variety of customers over a period of time. The evidence should cover all the performance criteria and as much of the range as possible.

To cover any range not covered by performance and to ensure complete coverage of the underpinning knowledge and understanding written/oral answers to questions could be used.

### Outcome 3

Performance evidence could be gathered by observing the candidate dealing with incidences of customer dis-satisfaction over a period of time. The evidence should cover all the performance criteria and as much of the range as possible.

To cover any range not covered by performance and to ensure complete coverage of the underpinning knowledge and understanding written/oral answers to questions could be used.

## **SPECIAL NEEDS**

This unit specification is intended to ensure that there are no artificial barriers to learning or assessment. Special 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 SQA document *Guidance on Special Assessment and Certification Arrangements* (SQA, 1998).