

NVQs/SVQs

# customer service

assessment strategy for customer service

NVQs/SVQs at Levels 2, 3 and 4

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This document gives details of the Assessment Strategy for the Customer Service NVQs and SVQs at Levels 2, 3 and 4. It gives the key requirements for Customer Service Awarding Bodies, External and Internal Verifiers, Assessors and NVQ/SVQ Centres regarding:

- 1 External quality control
- 2 Assessor and Verifier occupational competence
- 3 Workplace performance and simulation

## 1 External quality control of assessment

### 1.1 Monitoring centre performance

Awarding Bodies:

- a. carry out thorough risk assessments of organisations applying to become Approved Centres for the Customer Service Level 2, 3 and 4 NVQs/SVQs, following the requirements of the regulatory bodies
- b. apply quality control management measures appropriate to assess each Centre's risk
- c. ensure that all Centres using simulation or a realistic working environment have followed the criteria in this Assessment Strategy as part of Centre approval
- d. ensure that EVs check the provision of simulation and/or realistic working environment against the criteria during their first visit
- e. ensure that EVs continue to check this on every subsequent visit.

### 1.2 External verification

Awarding Bodies will appoint EVs and will monitor all EV practices.

Customer Service Awarding Bodies will facilitate external verification by ensuring EVs have:

- f. a thorough knowledge of the Level 2, 3 or 4 National Occupational Standards in Customer Service, appropriate to the level the EV is working with, and the ability to interpret them across a wide variety of customer service environments
- g. experience and working knowledge of the operational and assessment processes of the Customer Service NVQ/SVQ at the level the EV is working with
- h. relevant and credible customer service experience across the level and breadth of the National Occupational Standards and NVQs/SVQs at the level the EV with working with
- i. knowledge of current customer service practice and emerging issues in the customer service arena
- j. high levels of communication and interpersonal skills.



To facilitate this Awarding Bodies will:

- k. circulate and disseminate information appropriate to the job role, from ICS, to all EVs when this supports the Awarding Body communication strategy/schedule
- l. advise EVs of the availability of the ICS web pages
- m. hold briefings for EVs about the revised Customer Service National Occupational Standards and NVQs/SVQs
- n. encourage EVs to take part in ICS events regarding the Customer Service National Occupational Standards and NVQs/SVQs whenever this is felt appropriate
- o. seek Centre feedback regarding the performance of EVs and act on this feedback
- p. ensure that Centres have requested feedback from their employers in the feedback process
- q. ensure that EVs follow the relevant regulatory code of practice for EVs and if no code of practice is developed (as in Scotland) Awarding Bodies will develop their own and apply it
- r. ensure that where a realistic working environment is used IVs and EVs carry out a full examination of the working practices and the assessment process
- s. ensure that IVs and EVs carry out a full examination of any simulated activities where these are used.

## 2 Assessor, Internal and External Verifier occupational competence

**Level 2:** The table at **Appendix A** shows the ICS requirements for the occupational competence of Assessors, Internal and External Verifiers at Level 2.

**Level 3:** The table at **Appendix B** shows the ICS requirements for the occupational competence of Assessors, Internal and External Verifiers at Level 3.

**Level 4:** The table at **Appendix C** shows the ICS requirements for the occupational competence of Assessors, Internal and External Verifiers at Level 4.

In these tables ICS has suggested some ways in which Awarding Bodies can gain evidence to meet these requirements – these are not compulsory, just a guide. The tick boxes on the right show whether the evidence applies to Assessors (A), Internal Verifiers (IV) or External Verifiers (EV).

## 3 Simulation and realistic workplace performance

Wherever possible, assessment of all the Customer Service National Occupational Standards and NVQs/SVQs should be carried out in a **real job (either paid or voluntary)**. Where this is not possible this Assessment Strategy does allow for:

- the use of **simulation** for **Units 1, 5 and 6**. To undertake assessment of simulated activities for these three Units the guidelines for simulation shown at **Appendix D** must be met
- the use of a **realistic working environment including work experience and work placement** for **Units 9, 10, 11, 12, 13, 14, 15, 16, 17, 21, 22, 23, 31, 36, 37, 38**. To undertake assessment in a realistic working environment the guidelines shown at **Appendix E** must be met

**All other Units must be achieved in a real working situation (either paid or voluntary).**

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are	gathering feedback from a variety of Centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DfES and Accreditation Bodies and ICS		✓	✓
		explaining the differences between the four UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in customer service across organisations and industries	gathering feedback from a variety of employers and Centres			✓
		attending conferences or workshops where trends and developments in customer service are on the agenda	✓	✓	✓
		reading customer service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding customer service	✓	✓	✓
		joining the ICS	✓	✓	✓
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service NVQs/SVQs Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service NVQ/SVQs	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
5	Relevant and credible customer service experience across the level and breadth of the Standards and NVQs/ SVQ at Level 2	gathering feedback from a variety of employers and Centres			✓
		demonstrating at least one year's experience of delivering customer service as part of their job	✓	✓	
		demonstrating at least two year's experience of delivering customer service as part of their job			✓
		responding appropriately to ICS recommended questions	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs, and within 12 months for EVs. In Scotland all Assessors and Verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE	producing certificates or evidence of working towards these Units	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of Centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DfES and Accreditation Bodies and ICS		✓	✓
		explaining the differences between the four UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in customer service across organisations and industries	gathering feedback from a variety of employers and Centres			✓
		attending conferences or workshops where trends and developments in customer service are on the agenda	✓	✓	✓
		reading customer service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding customer service	✓	✓	✓
		joining the ICS	✓	✓	✓
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service NVQs/SVQs Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service NVQ/SVQ	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
5	Relevant and credible customer service experience across the level and breadth of the Standards and NVQs/SVQs at Level 3	gathering feedback from a variety of employers and Centres			✓
		demonstrating at least two year's experience of delivering customer service as part of their job	✓	✓	
		demonstrating at least three year's experience of delivering customer service as part of their job			✓
		responding appropriately to ICS recommended questions	✓	✓	✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs, and within 12 months for EVs. In Scotland all Assessors and Verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE	producing certificates or evidence of working towards these Units	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

The Assessor, IV and EV working at Level 4 must have:		This can be evidenced by:	A	IV	EV
1	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of Centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
2	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DfES and Accreditation Bodies and ICS		✓	✓
		explaining the differences between the four UK countries	✓	✓	✓
3	Knowledge of current practice and emerging issues and changes in customer service across organisations and industries	gathering feedback from a variety of employers and Centres			✓
		attending conferences or workshops where trends and developments in customer service are on the agenda	✓	✓	✓
		reading customer service publications and articles	✓	✓	✓
		regularly looking at the ICS website for new developments	✓	✓	✓
		keeping up to date with media news regarding customer service	✓	✓	✓
		joining the ICS	✓	✓	✓
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service NVQs/SVQs Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service NVQ/SVQ	✓	✓	✓
		responding appropriately to ICS recommended questions	✓	✓	✓
5	Relevant and credible Customer Service experience across the level and breadth of the Standards and NVQs/SVQs at Level 4	gathering feedback from a variety of employers and Centres			✓
		demonstrating at least three year's experience of delivering customer service as part of their job	✓	✓	
		demonstrating at least four year's experience of delivering customer service as part of their job			✓
		responding appropriately to ICS recommended questions	✓	✓	✓
6	Appropriate A and V Units according to their role – Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVS and within 12 months for EVs. In Scotland all Assessors and Verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE	producing certificates or evidence of working towards these Units	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓



appendix

D

## Simulated activities guidelines for Customer Service National Occupational Standards

**(Units 1, 5 and 6 only)**

Simulation is defined by ICS as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

To undertake the assessment of simulated activities for these three Units, the following guidelines must be met:

- a. when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say
- b. the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced
- c. the person taking part in the simulation as a customer must be credible for the situation that is being simulated
- d. any resources or equipment that would normally be in real work should be available and in working order for the simulation
- e. candidates should complete the required tasks of the National Occupational Standards and in the timescales that would normally be expected in real work
- f. candidates should complete the required tasks taking account of legislation and regulation that would apply in real work
- g. candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality
- h. whilst the primary purpose of the simulation is for assessment, feedback must be given in a way that builds confidence.



## Realistic working environment guidelines for Customer Service National Occupational Standards

**(Units 9, 10, 11, 12, 13, 14, 15, 16, 17, 21, 22, 23, 31, 36, 37 and 38 only)**

It is essential that organisations wishing to operate a realistic working environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE, the following guidelines must be met:

- a. assessments must be carried out under realistic business pressures, using real customers and within a defined service offer
- b. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
- c. candidates must be expected to achieve a volume of work comparable to normal business practices
- d. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards
- e. account must be taken of any legislation or regulations in relation to the type of work that is being carried out
- f. candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at Level 2
- g. candidates must show that their productivity reflects those found in the work situation being represented
- h. customer perceptions of the RWE is similar to that found in the work situation being represented
- i. the RWE is managed as a real work situation.