Group Award Specification for:

Award in Customer Service: Principles and Practices

Group Award Code: GG2A 45

Validation date: January 2013

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Version: 1

Contents

1   Introduction

This document was previously known as the Arrangements document. The purpose of this document is to:

♦   assist centres to implement, deliver and manage the qualification
♦   provide a guide for new staff involved in offering the qualification
♦   inform course managers teaching staff, assessors, learners, employers and HEIs of the aims and purpose of the qualification
♦   provide details of the range of learners the qualification is suitable for and progression opportunities

The Award in Customer Service: Principles and Practices at SCQF level 5 was validated January 2013. This document includes: background information on the development of this short award, its aims, guidance on access, details of the award structure, and guidance on delivery, etc.

1.1   Title of the award

The title of the award, ie Customer Service: Principles and Practices at SCQF level 5 has been chosen to reflect the title of the one mandatory Unit which makes up this award. Consultation on the title indicated that 80% of respondents felt the title of the award was appropriate. The award is levelled at SCQF level 5 in line with the level of the mandatory Unit.

1.2   Background Information and Rationale for the Development of the award

Customer service impacts on all occupational sectors. People working in eg hotels, retail outlets or travel organisations; beauty therapy, hairdressing or sports centres; local authorities or voluntary organisations, etc all require effective customer service skills and knowledge.

SQA has therefore developed a suite of Group Awards and Units in Customer Service and Customer Care — and the Award in Customer Service: Principles and Practices at SCQF level 5 is part of SQA's suite.

SQA, in conjunction with the relevant SSC (People 1st), identified possible market opportunities for a short award to provide learners with essential skills and knowledge in Customer Service. It was agreed that this award would be aligned to the WorldHost[1] 'Principles of Customer Service' training programme.

A virtual, small Qualifications Design Team (QDT) was therefore established to develop this award and to advise on the content of the Unit. As well as SQA acting as the lead officer, the QDT involved the People1st and External Verifiers, etc.

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[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.

The QDT consulted with relevant stakeholders such as current centres offering SQA customer service/care qualifications; potential centres; WorldHost licenced trainers; voluntary organisations; 2014 Commonwealth Games organisations, etc. The consultation considered both the award and the mandatory Unit and was mainly via an electronic survey engine. There was an extremely positive response with 100% of respondents supporting the content of the Unit and 95% agreeing that the award is suitable for the proposed target groups.

The Award in Customer Service: Principles and Practices at SCQF level 5 covers the fundamental skills, knowledge and personal factors essential in providing professional customer service. It is designed as a practical award in which learners are encouraged to apply these essential skills, knowledge and behaviours to real work situations. As such, this award can be conceptualised for many types of organisations across the public, private and voluntary sectors.

1.3   Target Group

There is a wide target group for this award as it is not only suitable for those who already deal with customers and wish to enhance their skills and knowledge in providing professional customer service, but also those who are interested in becoming involved in dealing with customers.

In addition, as outlined earlier, learners who have completed the WorldHost Principles of Customer Service training programme are well-suited to undertake this award.

1.4   Employment Opportunities

Learners achieving the Award in Customer Service: Principles and Practices at SCQF level 5 should have enhanced their customer service skills and knowledge and be able to apply these to a real situation. Thus they should be able to provide professional customer service to the benefit of themselves and to the organisations which they work for now or in the future.

There is a wide range of customer service roles for those achieving this award (in face to face situations, via telephone, etc) across many types of organisations in the public, private and voluntary sectors. This could include:

♦ service centres
♦ retail stores
♦ hotels and restaurants
♦ office environments
♦ local authorities
♦ utility companies
♦ passenger transport
♦ voluntary organisations
♦ customer reception departments

Organisations should benefit from the enhanced customer service awareness skills that learners will develop in creating a positive impression with customers and dealing with customers' needs.

1.5 Progression and Articulation

The Award in Customer Service: Principles and Practices at SCQF level 5 is not intended solely as a vehicle for progression; it is a stand-alone award which will fully met the needs of the learners who do not wish to undertake further awards.

However, achievement of this award can help support learners to progress to higher level Customer Service and Customer Care Units, Awards and Qualifications. The award could also help provide underpinning knowledge for SVQs at levels 2 and 3 in Customer Service or other SVQs in, eg retail, hospitality, travel and tourism, beauty therapy, hairdressing, etc.

2 Qualification structure

This short award is made up of one SQA Unit (0.50 credit), which comprises 3 SCQF credit points at SCQF level 5. The Core Skill component Oral Communication at SCQF level 5 is embedded in the Unit. See Section 5.3 for more information and mapping of Core Skills development opportunities.

2.1 Structure

The Award in Customer Service: Principles and Practices at SCQF level 5 (GG2A 45) will be achieved on successful completion of the one mandatory Unit.

4 code	2 code	Unit title	SQA credit	SCQF credit points	SCQF level
H315	11	Customer Service: Principles and Practices	0.5	3	5

3 Aims of the qualification

The Award in Customer Service: Principles and Practices at SCQF level 5 is designed to provide learners with the skills and knowledge to enable them to provide professional Customer Service within organisations.

3.1 General aims of the qualification

3.1.1 Enable learners to develop essential skills and knowledge in providing positive, professional Customer Service across a range of organisations and industry contexts.

3.1.2 Provide recognition for the Customer Service skills and achievements of learners in a relevant work context (either their own or one which they might meet in the future).

3.1.3 Enable learner to progress within the SCQF framework of qualifications.

3.1.4 Enhance Customer Service skills within organisations to improve organisational performance.

3.2　Specific aims of the qualification

The specific aims of the Award in Customer Service: Principles and Practices at SCQF level 5 are to:

3.2.1　Provide learners with the skills and knowledge required to make a positive impression with customers.

3.2.2　Provide learners with the skills and knowledge required for dealing effectively with customer needs, including customer dissatisfaction.

3.2.3　Enable learners to understand the personal qualities required in providing professional Customer Service.

3.2.4　Enable learners to develop good communication and effective listening skills.

4   Recommended entry to the qualification

Entry to this qualification is at the discretion of the centre. The following information on prior knowledge, skills, experience or qualifications that provide suitable preparation for this qualification has been provided by the Qualification Design Team as guidance only.

Learners would benefit from having attained the skills, knowledge and understanding required by one or more of the following or equivalent qualifications and/or experience:

Communication skills at SCQF level 4 or equivalent.

4.1   Core Skills entry profile

The Core Skill entry profile provides a summary of the associated assessment activities that exemplify why a particular level has been recommended for this qualification. The information would be used to identify if additional learning support needs to be put in place for learners whose Core Skills profile is below the recommended entry level or whether learners should be encouraged to do an alternative level or learning programme.

Core Skill	Recommended SCQF entry profile	Associated assessment activities
Communication Oral Communication	4	Take part in spoken interaction with one of more customers; make a significant contribution by making a good impression; understand and deal with customers' needs; provide key information on products and/or services. Judge degree of formality needed when dealing with customers; express themselves clearly by choosing appropriate language that customers will understand and which is appropriate to products and/or services. Convey all relevant information to customers, with appropriate supporting detail, in a logical order, linking related information, eg could include summarising of main points of products and/or services. Emphasise main points to customers through adjusting their tone, pace, gestures, volume of speaking, etc; My have to use technical language appropriate to products and/or services but minimise the use of jargon; adapt speaking to take account of sensitive issues, eg dealing with customer dissatisfaction.

Core Skill	Recommended SCQF entry profile	Associated assessment activities
		Use appropriate body language when in dealing with customers, eg making eye contact, smiling, posture, appropriate gestures, etc. Pick out and understand customers' needs by listening carefully to what they say, and where necessary asking questions for clarification; explore issues about products and/or services in greater depth; giving extra details, etc.
Numeracy	N/A	
Information and Communication Technology (ICT)	N/A	
Problem Solving	N/A	
Working with Others	N/A	

5   Additional benefits of the qualification in meeting employer needs

This qualification was designed to meet a specific purpose and what follows are details on how that purpose has been met through mapping of the Units to the aims of the qualification. Through meeting the aims, additional value has been achieved by linking the Unit standards with those defined in National Occupational Standards and/or trade/professional body requirements. In addition, significant opportunities exist for learners to develop the more generic skill, known as Core Skills through doing this qualification.

5.1 Mapping of qualification aims to Units

Code	Unit title	Aims							
		3.1.1	**3.1.2**	**3.1.3**	**3.1.4**	**3.2.1**	**3.2.2**	**3.2.3**	**3.2.4**
H315 11	Customer Service: Principles and Practices	3	3	3	3	3	3	3	3

5.2 Mapping of National Occupational Standards (NOS) and/or trade body standards

Current responsibility for the maintenance and development of the Customer Service NOS lies with Skills CFA.

The table below summarises the links between the Award in Customer Service: Principles and Practices at SCQF level 5 and the relevant NOS.

Please note that these three NOS are from the Customer Service theme of 'Impression and Image'. This theme covers the Customer Service behaviours and processes that have the most impact on how customers see those providing the service and their organisations. Customers maybe external to the organisation or they may be internal customers.

Code	Unit title	National Occupational Standard		
H315 11	Customer Service: Principles and Practices	A3 Communicate Effectively with Customers	A4 Give Customers a Positive Impression of Yourself and your Organisations	A9 Go the Extra Mile in Customer Service

5.3   Mapping of Core Skills development opportunities across the qualification

The table below shows where there are opportunities for Core Skills to be developed within the Award in Customer Service: Principles and Practices at SCQF level 5.

Please note:

♦   embedded means learners who achieve the Unit will automatically have their Core Skills profile updated on their certificate
♦   signposted means learners will be developing aspects of Core Skills through teaching and learning approaches but not enough to attract automatic certification

The Unit specification provides further detail on the opportunities to develop Core Skills.

Unit code	Unit title	Communication		Numeracy		ICT		Problem Solving			Working with Others	
		Written	Oral	Using Number	Using Graphical Information	Accessing Information	Providing/Creating Information	Critical Thinking	Planning and Organising	Reviewing and Evaluating	Working Co-operatively with Others	Reviewing Co-operative Contribution
H315 11	Customer Services: Principles and Practices	N/A	Embedded at SCQF level 5	N/A	N/A	N/A	N/A	Signposted at SCQF level 5	N/A	N/A	Signposted at SCQF level 5	Signposted at SCQF level 4

5.4   Assessment Strategy for the qualification(s)

Evidence for the mandatory Unit of the Award in Customer Service: Principles and Practices at SCQF level 5 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 individual learners.

Unit	Assessment
	Outcome 1 and Outcome 2
H315 11 Customer Service: Principles and Practices	(i) An integrated approach to gathering evidence is encouraged, along the lines of: ♦ 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. (ii) 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 above to ensure all Outcomes, Performance Criteria and Evidence Requirements are covered.

Notes:

♦ Evidence from the WorldHost training programme Principles of Customer Service can be used towards achievement of this Unit.
♦ Where assessment or the preparation for the assessment involves group activities, centres should ensure that learners 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. Please see the Unit specification for details.

6   Guidance on approaches to delivery and assessment

As outlined earlier, this short award is suitable for a wide range of sectors, eg retail, hospitality; travel and tourism; passenger transport; hairdressing; sport, etc

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

Across the mandatory Unit, learners should:

♦ understand the communication process and personal factors involved in professional Customer Service
♦ develop good communication and effective listening skills and techniques — this must cover face to face interaction but eg could also include telephone communications
♦ understand what is involved in 'going the extra mile' in Customer Service

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.

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

This Unit can be delivered in the workplace and/or 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, this 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; recordings of dealing with customers on a face to face basis; witness statements, etc).

6.1   Sequencing/integration of Units

The Outcomes in the mandatory Unit are very closely linked, so it is possible to deliver this award 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.

6.2   Recognition of Prior Learning

SQA recognises that learners gain knowledge and skills acquired through formal, non-formal and informal learning contexts.

In some instances, a full Group Award may be achieved through the recognition of prior learning. However, it is unlikely that a learner would have the appropriate prior learning and experience to meet all the requirements of a full Group Award.

The recognition of prior learning may **not** be used as a method of assessing in the following types of Units and assessments:

♦ HN Graded Units
♦ Course and/or external assessments
♦ Other integrative assessment Units (which may or not be graded)
♦ Certain types of assessment instruments where the standard may be compromised by not using the same assessment method outlined in the Unit
♦ Where there is an existing requirement for a licence to practice
♦ Where there are specific health and safety requirements
♦ Where there are regulatory, professional or other statutory requirements
♦ Where otherwise specified in an Assessment Strategy

More information and guidance on the *Recognition of Prior Learning* (RPL) may be found on our website **www.sqa.org.uk**.

As outlined earlier, evidence from the WorldHost training programme Principles of Customer Service can contribute to this Award in Customer Service: Principles and Practices at SCQF level 5.

6.3 Opportunities for e-assessment

E-assessment may be appropriate for some assessments in this award. 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**.

6.4 Support materials

To assist in the delivery and assessment of this award, an Assessment Support Pack (ASP) and a learner support pack are available from April 2013. These can be downloaded from the SQA secure website.

7 General information for centres

Equality and inclusion

The Unit specifications making up this Group Award have been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners will 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**.

Internal and external verification

All assessments used within this/these qualification(s) should be internally verified, using the appropriate policy within the centre and the guidelines set by SQA.

External verification will be carried out by SQA to ensure that internal assessment is within the national guidelines for these qualifications.

Further information on internal and external verification can be found in *SQA's Guide to Assessment* **(www.sqa.org.uk/GuideToAssessment)**.

8   Glossary of terms

Embedded Core Skills: is where the assessment evidence for the Unit also includes full evidence for complete Core Skill or Core Skill components. A learner successfully completing the Unit will be automatically certificated for the Core Skill. (This depends on the Unit having been successfully audited and validated for Core Skills certification.)

Finish date: The end of a Group Award's lapsing period is known as the finish date. After the finish date, the Group Award will no longer be live and the following applies:

♦   candidates may not be entered for the Group Award
♦   the Group Award will continue to exist only as an archive record on the awards Processing System (APS)

Lapsing date: When a Group Award is entered into its lapsing period, the following will apply:

♦   the Group Award will be deleted from the relevant catalogue
♦   the Group Award specification will remain until the qualification reaches its finish date at which point it will be removed from SQA's website and archived
♦   no new centres may be approved to offer the Group Award
♦   centres should only enter candidates whom they expect to complete the Group Award during the defined lapsing period

SQA credit value: The credit value allocated to a Unit gives an indication of the contribution the Unit makes to an SQA Group Award. An SQA credit value of 1 given to an SQA Unit represents approximately 40 hours of programmed learning, teaching and assessment.

SCQF: The Scottish Credit and Qualification Framework (SCQF) provides the national common framework for describing all relevant programmes of learning and qualifications in Scotland. SCQF terminology is used throughout this guide to refer to credits and levels. For further information on the SCQF visit the SCQF website at **www.scqf.org.uk**.

SCQF credit points: SCQF credit points provide a means of describing and comparing the amount of learning that is required to complete a qualification at a given level of the Framework. One National Unit credit is equivalent to 6 SCQF credit points. One National Unit credit at Advanced Higher and one Higher National Unit credit (irrespective of level) is equivalent to 8 SCQF credit points.

SCQF levels: The level a qualification is assigned within the framework is an indication of how hard it is to achieve. The SCQF covers 12 levels of learning. HNCs and HNDs are available at SCQF levels 7 and 8 respectively. Higher National Units will normally be at levels 6–9 and Graded Units will be at level 7 and 8. National Qualification Group Awards are available at SCQF levels 2–6 and will normally be made up of National Units which are available from SCQF levels 2–7.

Signposted Core Skills: refers to opportunities to develop Core Skills arise in learning and teaching but are not automatically certificated.

History of changes

It is anticipated that changes will take place during the life of the qualification and this section will record these changes. This document is the latest version and incorporates the changes summarised below.

Version Number	Description	Date

Acknowledgement

SQA also acknowledges the valuable support and contribution that People 1st have made to the development of this Award in Customer Service: Principles and Practices at SCQF level 5.

9   General information for learners

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

This Award in Principles of Customer Service at SCQF level 5 consists of one Unit. The purpose of this short award is to develop skills and knowledge that are essential in providing positive professional customer service. The award is therefore suitable for:

♦ those who already work with customers as well as those who are interested in dealing with customers effectively
♦ many industry sectors; private and public organisations; as well as voluntary organisations, charities, etc.

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

The Unit within this award 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. 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.

Core Skills

The Unit in this award has the Oral Communication component embedded within 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 other Core Skill Components, 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 the Unit and achieve this award, you will be able to:

♦ Create a positive impression customers
♦ Deal effectively with customer needs, including customer dissatisfaction

Where you achieve this award, 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 award.