



## Higher National Unit specification: general information

This Graded Unit has been validated as part of the **PDA in Customer Service within a Public Sector Organisation**. Centres are required to develop the assessment instrument in accordance with this validated specification. Centres wishing to use another type of Graded Unit or assessment instrument are required to submit proposals detailing the justification for change for validation.

**Graded Unit title:** Customer Service within a Public Sector Organisation: Graded Unit 1

**Graded Unit code:** FG5P 35

**Type of Graded Unit:** Project

**Assessment Instrument:** Investigation

**Publication date:** August 2010

**Source:** Scottish Qualifications Authority

**Version:** 01

## Unit purpose

This Graded Unit is designed to provide evidence that the candidate has achieved the following principal aims of the PDA in Customer Service within a Public Sector Organisation at SCQF level 8:

Enable first line managers, team leaders and supervisors to:

- 1 obtain the knowledge of the core management principles involved in effective customer service
- 2 develop an accurate and realistic insight into the effective management of customer service within Scottish local government and associated bodies
- 3 develop general management and other transferable skills within a customer service context
- 4 take ownership of customer service provision and actively develop solutions which will lead to improved organisational performance and customer experience
- 5 develop independent study and research skills both academically and in the workplace
- 6 interpret qualitative and quantitative data on customer service and draw on a range of sources in making judgments
- 7 work in ways that are reflective, self-critical and based on evidence

## General information for (cont)

### Recommended prior knowledge and skills

It is recommended that the candidate should have completed or be in the process of completing the following Units relating to the above specific aims prior to undertaking this Graded Unit:

- ◆ Applying the principles of customer service within a public sector organisation
- ◆ Implementing best practice in customer complaint handling within a public sector organisation
- ◆ Promoting excellent customer service within a public sector organisation

### Credit points and level

1 Higher National Unit credit at SCQF level 8: (8 SCQF credit points at SCQF level 8\*)

*\*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.*

### Core Skills:

There are opportunities to develop the Core Skills components listed below in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

- ◆ *Problem Solving* (Critical Thinking) at SCQF level 6,
- ◆ *Problem Solving* (Planning and Organising) at SCQF level 6
- ◆ *Problem Solving* (Reviewing and Evaluating) at SCQF level 6
- ◆ *Communication* (Oral Communication) at SCQF level 6
- ◆ Written Communication (Reading) at SCQF level 6
- ◆ Written Communication (Writing) at SCQF level 6
- ◆ *Working with Others* (Working Co-operatively with Others) at SCQF level 6
- ◆ *Working with Others* (Reviewing Co-operative Contribution) at SCQF level 6

### Assessment

This Graded Unit will be assessed by a project in the form of an investigation of an aspect of customer service provision issue within an organisation. The investigation should be problem orientated and should involve the candidate drawing conclusions and making recommendations. The developed investigation should provide the candidate with the opportunity to produce evidence that demonstrates she/he has met the aims of the Graded Unit that it covers.

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

### Conditions of assessment

The candidate should be given a date for completion of the **Investigation**. However, the instructions for the assessment task should be distributed to allow the candidate sufficient time to assimilate the details and carry out the assessment task. During the time between the distribution of the assessment task instructions and the completion date, assessors may answer questions, provide clarification, guidance and reasonable assistance. The assessment task should be marked as soon as possible after the completion date. The final grading given should reflect the quality of the candidate's evidence at the time of the completion date.

The evidence for the project is generated over time and involves three distinct stages, where each stage has to be achieved before the next is undertaken. Thus any re-assessment of stages must be undertaken before proceeding to the next stage.

If a candidate fails the project overall or wishes to upgrade, then this must be done using a *substantially different* project, ie all stages are undertaken using a new project, assignment, case study, etc. In this case, a candidate's grade will be based on the achievement in the re-assessment, if this results in a higher grade.

### Instructions for designing the assessment task

The assessment task is a project. The project undertaken by the candidate must be a complex task which involves:

- ◆ variables which are complex or unfamiliar
- ◆ relationships which need to be clarified
- ◆ a context which may be familiar or unfamiliar to the candidate

The assessment task must require the candidate to:

- ◆ analyse the task and decide on a course of action for undertaking the project
- ◆ plan and organise work and carry it through to completion
- ◆ reflect on what has been done and draw conclusions for the future
- ◆ produce evidence of meeting the aims which this Graded Unit has been designed to cover

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

### Project brief

Candidates will be required to choose a project which enables them to investigate an aspect of customer service provision in an organisation. The output will be a report on the investigation which should include:

- ◆ Detailed explanation of the topic being investigated
- ◆ Relevant theory
- ◆ Summary of research findings
- ◆ Conclusions drawn from the investigation
- ◆ Specific recommendations

The project brief should **cover aspects of all 3 of the following Units in the PDA Customer Service within a Public Sector Organisation at SCQF level 8:**

- ◆ Applying the principles of customer service within a public sector organisation
- ◆ Implementing best practice in customer complaint handling within a public sector organisation
- ◆ Promoting excellent customer service within a public sector organisation

**It should** sample topics and issues from the mandatory Units as listed in the table below:

| Unit Title  | Topic/Issues  |
|---|---|
| Applying the principles of customer service within a public sector organisation               | <ul style="list-style-type: none"><li>◆ Identify factors which affect the effective provision of customer service in a chosen area</li></ul>  |
| Implementing best practice in customer complaint handling within a public sector organisation | <ul style="list-style-type: none"><li>◆ Investigate the reasons for customer complaints in a chosen area</li><li>◆ Identify solutions for prevention of customer complaints in a chosen area</li></ul>  |
| Promoting excellent customer service within a public sector organisation                      | <ul style="list-style-type: none"><li>◆ Identify improvements which will lead to the provision of excellent customer service in a chosen area</li><li>◆ Make recommendations to implement improvements to customer service in a chosen area, which will result in the provision of excellent customer service</li></ul> |

The topic chosen should be one which will enable candidates to exercise autonomy at a professional level. In particular, the investigation should require them to take into account their own roles and responsibilities and the roles and responsibilities of others with respect to customer service. As part of this autonomy, candidates will also be expected to negotiate and develop a brief for their project.

### Guidance on grading candidates

Candidates who meet the minimum Evidence Requirements will have their achievement graded as C — competent, or A — highly competent or B somewhere between A and C. The grade related criteria to be used to judge candidate performance for this Graded Unit is specified in the following table.

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

| Grade A  | Grade C  |
|--|--|
| <p>Is a seamless, coherent piece of work which:</p> <ul style="list-style-type: none"> <li>◆ Demonstrates a broad knowledge of the scope, defining features, and main areas of the investigation</li> <li>◆ Uses a range of routine skills, techniques and practices which are linked to the provision of customer service, a few of which are advanced</li> <li>◆ Demonstrates understanding of a range of concepts and issues in relation to management styles in a customer service environment, and applies them accurately and relevantly to support points made</li> <li>◆ Uses advanced and specialised skills to convey complex information on the investigation into customer service provision to a range of audiences and for a range of purposes</li> <li>◆ Uses and evaluates numerical and graphical data to measure progress achieve goals and targets</li> <li>◆ Demonstrates autonomy and initiative in dealing customer service provision at a professional level</li> <li>◆ Includes a reasoned critical evaluation of current provision of customer service using valid customer service concepts</li> <li>◆ Takes continuing account of own and others' roles, responsibilities and contributions in evaluating the findings of the investigation</li> <li>◆ Uses a range of approaches to formulate evidence-based solutions to the objectives of the investigation</li> <li>◆ Includes a careful and considered reflection on the investigation which provides a strong basis for judging its success and making realistic recommendations for the future</li> <li>◆ Take significant managerial or supervisory responsibility for the work of others in defined areas of work</li> </ul> | <p>Is a co-ordinated piece of work which:</p> <ul style="list-style-type: none"> <li>◆ Contains sufficient evidence to meet the minimum requirements of each of the three stages of the investigation and is produced to an adequate standard</li> <li>◆ Uses some routine skills, techniques and practices which are linked to the provision of customer service, which are not advanced</li> <li>◆ Demonstrates limited understanding of concepts and issues in relation to management styles in a customer service environment, and applies them to support points made</li> <li>◆ Uses routine skills to convey some complex information on the investigation into customer service provision to limited audiences and for limited purposes</li> <li>◆ Uses and evaluates limited numerical and graphical data to identify progress towards achievement of goals and targets</li> <li>◆ Demonstrates some autonomy and initiative in dealing with customer service provision at a professional level</li> <li>◆ Includes some evaluation of current provision of customer service but one which lacks depth and supporting reasons and is not firmly based on customer service concepts</li> <li>◆ Takes some account of own and others' roles, responsibilities and contributions in evaluating the findings of the investigation</li> <li>◆ Uses a limited range of approaches to formulate evidence-based solutions to the objectives of the investigation</li> <li>◆ Includes limited reflection on the investigation which fails to provide a strong basis for judging its success or making realistic recommendations for the future</li> <li>◆ Take limited managerial or supervisory responsibility for the work of others in defined areas of work</li> </ul> |

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

The project will be marked out of 100. Assessors will mark each stage of the project, taking into account the criteria outlined. The marks will then be aggregated to arrive at an overall mark for the project. Assessors will then assign an overall grade to the candidate for this Graded Unit based on the following grade boundaries.

A = 70%–100%

B = 60%–69%

C = 50%–59%

**NOTE:** The candidate must achieve all of the minimum evidence specified below for each stage of the project in order to achieve the Graded Unit.

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

### Evidence Requirements

The project consists of three stages: planning; developing; and evaluating. The following table specifies the minimum evidence required to pass each stage.

**NOTE:** The candidate must achieve **all of the minimum evidence** specified below for each stage of the project in order to pass the Graded Unit.

| Project stage                         | Minimum Evidence Requirements   |
|---------------------------------------|---|
| Stage 1 —<br>Planning<br>20% of marks | <p>A plan for the investigation which includes:<br/>           A brief outlining the proposed investigation of an issue in relation to the provision of excellent customer service within an organisation. The brief must include:</p> <ul style="list-style-type: none"> <li>◆ The aims and objectives of the investigation</li> <li>◆ The rationale for choosing the topic of the investigation</li> <li>◆ Identification of the sources of information that will be used for the investigation with an explanation as to why each has been selected</li> <li>◆ Explanation of how the investigation will be conducted with reasons for the choice of methods adopted</li> <li>◆ A plan detailing timescales and resources</li> </ul> <p>The planning stage of the project should be a clear indicator of the structure and content of the investigation and could include charts and/or diagrams, although these are not necessary.</p> <p><b>Additional guidance on grading</b></p> <p>This stage is worth 20 marks. To gain high marks the candidate must demonstrate a high degree of autonomy in planning activities.</p> <p>For the planning stage the marks must be allocated in the following way:</p> <p>Up to <b>2 marks</b> for identifying the aims and objectives of the topic — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ extent to which the aims and objectives are consistent with the materials in the Units in the PDA Customer Service within a Public Sector Organisation at SCQF level 8</li> <li>◆ extent to which the objectives are clear specific and achievable within the expected time scale</li> </ul> |

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

|  |   |
|--|---|
|  | <p>Up to <b>4 marks</b> for an explanation of the rationale for choosing the topic of the investigation — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ extent to which the reasons given are convincing in terms of improving customer service within the organisation</li> <li>◆ clarity with which reasons are expressed</li> </ul> <p>Up to <b>4 marks</b> for the identification of the sources of information that will be used for the investigation with an explanation as to why each has been selected — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ range of sources identified</li> <li>◆ extent to which non-routine sources are used</li> <li>◆ validity of reasons given to justify sources selected</li> </ul> <p>Up to <b>7 marks</b> for explanation of how the investigation will be conducted with reasons for the choice of methods adopted — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ range of methods of conducting investigation including, gathering information</li> <li>◆ extent to which the conduct of the investigation is practical and achievable in terms of the organisational context of the investigation</li> <li>◆ involvement of others and explanation of how their co-operation will be obtained</li> <li>◆ validity of reasons used to justify methods used to carry out the investigation</li> </ul> <p>Up to <b>3 marks</b> for a plan detailing timescales and resources — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ inclusion of a final completion date and significant milestones towards reaching this date</li> <li>◆ explanation of the extent to which the timetable is likely to be realistic in terms of factors like organisational constraints on carrying out the investigation; other commitments of candidate etc</li> <li>◆ identification of resources (including time) needed to carry out the plan</li> <li>◆ indication of how resources will be obtained</li> </ul> |
|  | <p><i>The candidate must achieve all of the minimum evidence specified above in order to pass the Planning stage.</i></p>   |



## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

| Project stage                           | Minimum Evidence Requirements  |
|---|--|
| Stage 2 —<br>Developing<br>40% of marks | <p>The development of an investigation which includes:</p> <ul style="list-style-type: none"> <li>◆ Collection and collation of relevant information</li> <li>◆ Interpretation/analysis of data, including use of relevant theory</li> <li>◆ Conclusions from the interpretation/analysis</li> <li>◆ Recommendations based on the conclusions</li> <li>◆ A properly structured report</li> </ul> <p>The development stage of the project should contain substantial content which covers all requirements of development. It is likely that information will reflect what has been planned for in stage 1 and contain in depth interpretation and analysis of data collected.</p> <p><b>Additional guidance on grading</b></p> <p>This stage is worth 40 marks. Assessment is based on a written report of the activity. To gain high marks the candidate must demonstrate a high degree of autonomy in developing the project.</p> <p>Up to 8 <b>marks</b> for the collection and collation of relevant information — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ accuracy of information gathered</li> <li>◆ relevance of information to the project</li> <li>◆ range of methods used to gather information</li> <li>◆ reference to relevant theories of customer service and how they have informed the collection of information</li> </ul> <p>Up to 10 <b>marks</b> for showing interpretation/analysis of data — marks should be based on:</p> <ul style="list-style-type: none"> <li>◆ range and relevance of theories and/or perspectives on customer service to the interpretation/analysis</li> <li>◆ explanation and discussion of the way in which theories and/or perspectives have contributed to the interpretation/analysis</li> <li>◆ the extent to which the interpretation/analysis relates to the aims and objectives identified in the plan for the investigation</li> <li>◆ the coherence of the analysis/interpretation</li> <li>◆ the extent to which the analysis/interpretation is related to the information gathered</li> </ul> |

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

|  |   |
|--|---|
|  | <p>Up to 6 <b>marks</b> for conclusions drawn from the investigation — marks should be based on:</p> <ul style="list-style-type: none"><li>◆ extent to which conclusions follow from the analysis/interpretation</li><li>◆ extent to which the conclusions match the aims and objectives identified in the plan for the investigation</li><li>◆ extent to which the conclusions are based on the information gathered for the investigation</li></ul> <p>Up to 6 <b>marks</b> for recommendations from the investigation — marks should be based on:</p> <ul style="list-style-type: none"><li>◆ extent to which recommendations follow from the conclusions</li><li>◆ extent to which the recommendations are realistic as far as the organisation is concerned</li><li>◆ reasons given to justify the recommendations</li></ul> <p>Up to 10 <b>marks</b> for <b>presenting</b> a properly structured and referenced report — marks should be based on:</p> <ul style="list-style-type: none"><li>◆ Detailed explanation of the topic being investigated</li><li>◆ Relevant theory</li><li>◆ Summary of research findings</li><li>◆ Conclusions drawn from the investigation</li><li>◆ Specific recommendations</li><li>◆ A list of acknowledgements and sources of reference</li><li>◆ An appendix containing any relevant material — customer feedback etc</li></ul> |
|  | <p><i>The candidate must achieve all of the minimum evidence specified above in order to pass the Developing stage.</i></p>   |

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

| Project stage                   | Minimum Evidence Requirements  |
|---------------------------------|--|
| <p>Stage 3 —<br/>Evaluating</p> | <p><i>An evaluation of the effectiveness of all parts of the investigation which should include:</i></p> <ul style="list-style-type: none"> <li>◆ An assessment of the action plan in light of experience, including a review of any unforeseen events, if appropriate, and how they were handled</li> <li>◆ Identify any knowledge and skills that have been gained and/or developed</li> <li>◆ Assess the strengths and weaknesses of the main body of the investigation report</li> <li>◆ Reflection on the success of the investigation with recommendations for improvements</li> </ul> <p><i>The evaluation of the project will provide an opportunity to reflect on the success of the investigations. It should, therefore, include a review of all stages of the investigation and results achieved in the process.</i></p> <p><b>Additional Guidance on Grading</b></p> <p><i>This stage is worth <b>40 marks</b>. The evaluating stage is assessed by a written evaluation. To gain high marks candidates should demonstrate a high degree of autonomy in evaluating activities. The marks for this stage should be allocated in the following way:</i></p> <p><i>Up to 10 <b>marks</b> for an assessment of the action plan in light of experience — marks should be based on:</i></p> <ul style="list-style-type: none"> <li>◆ extent to which the plan enabled the aims and objectives of the investigation to be met</li> <li>◆ reflection on the suitability of the aims and objectives for the investigation</li> <li>◆ discussion of any unforeseen events and how they were handled, including a commentary on why there were no unforeseen events if this was the case</li> <li>◆ extent to which the plan contributed to monitoring the progress of the investigation</li> <li>◆ strength and validity of reasons given to support points made</li> </ul> |

## Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

|  |   |
|--|---|
|  | <p><i>Up to <b>5 marks</b> for identifying any knowledge and skills that have been gained and/or developed — marks should be based on:</i></p> <ul style="list-style-type: none"> <li>◆ reference to specific Knowledge and/or Skills and why these are new and important to the candidate</li> <li>◆ explanation of how investigation contributed to acquisition of these new Knowledge and/or Skills</li> <li>◆ strength and validity of reasons given to support points made</li> </ul> <p><i>Up to <b>10 marks</b> for assessing the strengths and weaknesses of the main body of the investigation report — marks should be based on:</i></p> <ul style="list-style-type: none"> <li>◆ making reference to both the planning and developing stages when explaining strengths and weaknesses</li> <li>◆ identification of both strengths and weaknesses [which could, if desired, be expressed in terms of what went well and what did not go as well as expected]</li> <li>◆ extent to which the candidate adopts a realistic attitude to identifying strengths and weaknesses</li> <li>◆ the strength and validity of the reasons given to support points made</li> </ul> <p><i>Up to <b>15 marks</b> for reflection on the success of the investigation with recommendations for improvements — marks should be based on:</i></p> <ul style="list-style-type: none"> <li>◆ overall effectiveness of the investigation in terms of the extent to which its aims and objectives were achieved</li> <li>◆ reflection on the methods used to collect information and on the value of the information obtained</li> <li>◆ reflection on the theories and/or perspectives of customer service used in the investigation and whether or not they made a useful contribution to the conclusions and recommendations</li> <li>◆ extent to which the recommendations are acceptable to the organisation and the likelihood of them being implemented</li> <li>◆ degree of co-operation from others during the investigation and the impact that this had</li> <li>◆ lessons for the candidate about the implementation of excellent customer service</li> <li>◆ lessons from the investigation for future investigations into customer service provision</li> <li>◆ the strength and validity of the reasons given to support points made</li> </ul> |
|  | <p><i>The candidate must achieve all of the minimum evidence specified above in order to pass the Evaluating stage.</i></p>   |

## **Higher National Graded Unit specification: instructions for designing the assessment task and assessing candidates (cont)**

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

### **Support notes**

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

As this Unit is student-initiated and driven, it requires only guidance and direction on the part of the lecturer. Primarily, the role of the lecturer is that of mentor. The expectation is that the candidate works independently, demonstrating a thorough understanding of each stage of the Unit, ie, planning, developing and evaluating. Problem solving skills and evaluative skills should be evident.

Candidates should be encouraged to draw upon their learning and assignments for the Units from PDA in Customer Service within Public Sector Organisations and placement or workplace experience.

Prior to commencing the investigation the candidate should discuss his/her choice of topic with the tutor to ensure that one of suitable substance is selected. Given the nature of the sector, there will be a wide range of potential topics. Some examples are given below which may provide a starting point for tutor/candidate discussion and selection:

- ◆ Are current customer relationship management procedures effective?
- ◆ How are customer expectations managed to ensure customer service is reliable and achievable?
- ◆ How important are motivation and leadership skills to successful customer service?

### **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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## General information for candidates

**Graded Unit title:** Customer Service within a Public Sector  
**Organisation:** Graded Unit 1

This Unit has been designed to allow you to integrate your learning across a range of Units in the PDA Customer Service within a Public Sector Organisation. You should be able to draw upon your learning and assignments for the mandatory Units and your placement or workplace experience. You will have the opportunity to discuss and agree on the topic to be undertaken with the placement supervisor/teacher/line manager.

On completion of this Unit, you will be able to demonstrate that you have achieved the following principal aims of the PDA:

- 1 obtain the knowledge of the core management principles involved in effective customer service
- 2 develop an accurate and realistic insight into the effective management of customer service within Scottish local government and associated bodies
- 3 develop general management and other transferable skills within a customer service context
- 4 take ownership of customer service provision and actively develop solutions which will lead to improved organisational performance and customer experience
- 5 develop independent study and research skills both academically and in the workplace
- 6 interpret qualitative and quantitative data on customer service and draw on a range of sources in making judgments
- 7 work in ways that are reflective, self-critical and based on evidence

This Graded Unit will be assessed by the use of a project in the form of an investigation of an issue relating to managing excellent customer service within a public sector organisation. Assessment is based on the **product** and the **process**.

The developed Investigation should provide you with the opportunity to produce evidence that demonstrates you have met the aims of the Graded Unit that it covers by:

- ◆ Demonstrating the skills required to plan an investigation
- ◆ Carrying out the investigation
- ◆ Presenting findings and conclusions
- ◆ Evaluating the effectiveness of the investigation