

FE1N 04 (CFACSF2) Follow the Rules to Deliver Customer Service

This Unit has the following Elements:

- F2.1 Follow your organisation's customer service practices and procedures.
- F2.2 Follow legislation and external regulation that relate to customer service.

Unit Summary

This Unit is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This Unit requires you to show that you know and understand the all rules that apply to customer service delivered by your organisation and how they apply to you and your job.

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F2.1 Follow your organisation's customer service practices and procedures

Performance Criteria

You must be able to:

- F2.1.1 Follow organisational practices and procedures that relate to your customer service work.
- F2.1.2 Recognise the limits of what you are allowed to do when delivering customer service.
- F2.1.3 Refer to somebody in authority when you need to.
- F2.1.4 Work in a way that protects the security of customers and their property.
- F2.1.5 Work in a way that protects the security of information about customers.

F2.2 Follow legislation and external regulation that relate to customer service

Performance Criteria

You must be able to:

- F2.2.1 Work in a way that is safe for your customers and your colleagues.
- F2.2.2 Treat customers equally.
- F2.2.3 Respect confidentiality relating to customers and the organisation.
- F2.2.4 Work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do.
- F2.2.5 Work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not.

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Knowledge and Understanding for the whole Unit

To be competent at following the rules to deliver customer service you must know and understand:

- F2a Organisational practices and procedures that relate to your customer service work.
- F2b The limits of what you are allowed to do when delivering customer service.
- F2c When and how you should refer to somebody in authority about the rules for delivering customer service.
- F2d How you protect the security of customers and their property.
- F2e How you protect the security of information about customers.
- F2f Your health and safety responsibilities as they relate to your customer service work.
- F2g Your responsibilities to deliver customer service treating customers equally.
- F2h Why it is important to respect customer and organisation confidentiality.
- F2i The main things you must do and not do in your job under legislation that affects your customer service work.
- F2j The main things that you must do and not do in your job under external regulations that affect your customer service work.

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Evidence Requirements

Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on a realistic working environment or a work placement is permissible.

- 1 Simulation is not allowed for any performance evidence within this unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 — February 2010*)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent
- 4 The 'organisation' from which you draw your evidence must be the organisation you work for or the organisation in which you have realistic work experience. The 'organisation' may be the whole of the organisation or the business unit, division or department with which you are involved.
- 5 You must provide evidence of following the rules to deliver customer service:
 - a During routine delivery of customer service
 - b During a busy time in your job
 - c During a quiet time in your job
 - d When people, systems or resources have to let you down.

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Candidate Recording Form

No	Description of evidence	Performance Criteria									
		F2.1.1	F2.1.2	F2.1.3	F2.1.4	F2.1.5	F2.2.1	F2.2.2	F2.2.3	F2.2.4	F2.2.5

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No	Description of evidence	Knowledge and Understanding									
		F2a	F2b	F2c	F2d	F2e	F2f	F2g	F2h	F2i	F2j

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Notes/Comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____