



## **Group Award Specification for:**

**Award in Customer Service at SCQF level 5**

**Group Award Code: GL07 45**

**Validation date: October 2015**

**Date of original publication: November 2015**

**Version: 01**

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# 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, candidates, employers and HEIs of the aims and purpose of the qualification
- ◆ provide details of the range of candidates the qualification is suitable for and progression opportunities

The Award in Customer Service at SCQF level 5 was validated in October 2015. 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 — Customer Service at SCQF level 5 has been chosen to reflect the generic nature of the qualification. The one mandatory Unit — *Give Customers a Positive Impression of Yourself and the Organisation* provides a good foundation in customer service and allows candidates to build on this with the addition of one optional Unit from seven.

## 1.2 Background information and rationale for the development of the Award

Customer service impacts on all occupational sectors. People working in for example, 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 Units — and the Award in Customer Service at SCQF level 5 is part of SQA's suite.

SQA received a request from one of its training providers acting on behalf of its clients to develop a qualification based on existing SVQ Customer Service Units. SQA consulted with other approved SVQ Customer Service centres about the proposed qualification and the feedback received was positive. The proposal was also considered and approved by SQA's Business Case Group.

Representatives from industry and training professionals carefully agreed that the combination of the Units in this Award addresses areas and skills which are common to many customer service roles as the mandatory Unit focuses on creating a positive impression of self and the organisation. In addition, there are seven optional Units which provide centres and candidates with the flexibility to tailor the qualification to their specific needs. The Award formally acknowledges competence in these customer service areas, as well as allowing progression to the full SVQ 2 in Customer Service at SCQF level 5.

In addition, industry representatives noted that the achievement of an Award is of greater value than a summary of Units achieved.

This Award therefore offers candidates the opportunity to develop their customer service skills in the workplace. The mandatory Unit will provide candidates with skills and knowledge to enable them to:

- ◆ communicate with customers to create a positive impression of themselves and the organisation they are working for.
- ◆ develop good communication and effective listening skills.
- ◆ adapt their behaviour in response to different customer behaviours.
- ◆ provide customers with appropriate information to meet their needs.

### 1.3 Target Group

There is a wide target group for this Award in Customer Service. As shown in Section 1, customer service impacts on all occupational sectors. However, the Award is made up of SVQ Units and therefore candidates must be able to generate evidence from the workplace in order to meet the requirements of the assessment strategy.

## 2 Qualification structure

The Award in Customer Service is made up of one mandatory Unit and a range of optional Units from which candidates must complete one. It comprises a minimum of 8 SCQF credits and a maximum of 11 SCQF credits depending on the choice of optional Unit. This meets the design principles for awards which are very flexible, ie awards can be at SCQF level 1 to level 12 and have at least one Unit.

### 2.1 Structure

To achieve the qualification candidates must complete the mandatory Unit and one optional Unit.

#### Mandatory Unit

4 code	2 code	Unit title	SCQF level	SCQF credit points	SQA credit
H9XK	04	Give Customers a Positive Impression of Yourself and the Organisation	5	5	1

#### Optional Units (candidates must select one Unit from this group)

4 Code	2 code	Unit title	SCQF level	SCQF credit points	SQA credit
H9XR	04	Deal with Customers Face-to-Face	5	5	1
H9XW	04	Deal with Customers In Writing or Electronically	6	6	1
H9XT	04	Deal with Incoming Telephone Calls from Customers	5	5	1
H9XV	04	Make Telephone Calls to Customers	5	6	1
H9Y0	04	Deal with Customers using a Social Media Platform	5	3	1
FE1V	04	Deliver Reliable Customer Service	5	5	1
H9YD	04	Resolve Customer Service Problems	5	6	1

The mandatory Unit is at SCQF level 5 and most optional Units are at SCQF level 5, so the overall SCQF level assigned to this qualification is SCQF level 5.

### **3 Aims of the qualification**

The aim of the qualification is to develop and/or enhance the candidate's customer service skills and knowledge.

#### **3.1 General aims of the qualification**

- 3.1.1** Enable candidates to develop essential skills and knowledge in providing positive, professional customer service.
- 3.1.2** Provide recognition for the customer service skills and achievements of candidates in a relevant work context.
- 3.1.3** Enable candidate 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 at SCQF level 5 are to:

- 3.2.1** Provide candidates with the skills and knowledge required to communicate with customers to create a positive impression of themselves and the organisation for which they work.
- 3.2.2** Provide candidates with the skills and knowledge required for communicating and listening effectively to customers.
- 3.2.3** Provide candidates with the skills and knowledge required to adapt their behaviour in response to different customer behaviours.
- 3.2.4** Provide candidates with the skills and knowledge required to ensure customers are provided with appropriate information.

### **4 Recommended entry to the qualification**

Entry to this qualification is at the discretion of the centre.

The Award is made up of SVQ Units and therefore anyone undertaking the Award must be in a position which will allow them to generate the appropriate work-based evidence to meet the requirements of the Units.

## 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 should be used to identify if additional learning support needs to be put in place for candidates whose Core Skills profile is below the recommended entry level or whether candidates should be encouraged to do an alternative level or learning programme.

Core Skill	Recommended SCQF entry profile	Associated assessment activities
Communication	4	The mandatory Unit requires candidates to communicate with customers in a way that makes them feel valued and respected; to respond appropriately to customers seeking help and to ensure that communications with customers are appropriate. Communication skills are, therefore, very important for this Award.
Problem Solving	4	The mandatory Unit requires candidates to find information that will help customers.
Working with Others	4	The evidence generated for this Award must come from real work and as such, candidates will be required to work closely with colleagues and customers.

## 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 candidates to develop the more generic skill, known as Core Skills through doing this qualification.

## 5.1 Mapping of qualification aims to the mandatory Unit

Code	Unit title	Aims			
		3.2.1	3.2.2	3.2.3	3.2.4
F940 04	Give Customers a Positive Impression of Yourself and the Organisation	✓	✓	✓	✓

## 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 Units making up the Award are NOS and there is therefore no need for a mapping.

## 5.3 Mapping of Core Skills development opportunities across the qualification

The following table highlights where opportunities exist for candidates to develop the Core Skills at the level identified.

Unit code	Unit title	Communication	Numeracy	ICT	Problem Solving	Working with Others
H9XK 04	Give Customers a Positive Impression of Yourself and the Organisation	5	-	5	5	5
H9XR 04	Deal with Customers Face-to-Face	5	5	-	5	5
H9XW 04	Deal with Customers In Writing or Electronically	6	6	6	6	6
H9XT 04	Deal with Incoming Telephone Calls from Customers	5	-	5	5	5
H9XV 04	Make Telephone Calls to Customers	5	-	5	5	5

Unit code	Unit title	Communication	Numeracy	ICT	Problem Solving	Working with Others
H9Y0 04	Deal with Customers using a Social Media Platform	5	5	5	5	5
FE1V 04	Deliver Reliable Customer Service	5	5	5	5	5
H9YD 04	Resolve Customer Service Problems	5	-	5	5	5

#### **5.4 Assessment Strategy for the qualification(s)**

As this is a work-based Award made up of the NOS for Customer Service the delivery and assessment of the Award is governed by the Assessment Strategy for the SVQs in Customer Service developed by Skills CFA. Please see Appendix 1 for an extract of the Assessment Strategy relating to centres and assessors/internal verifiers.



## 6 Guidance on approaches to delivery and assessment

It is expected that centres will deliver the Award in Customer Service at SCQF level 5 using the methods which they know from past experience comply with the Assessment Strategy. This is a workplace Award and candidates will be based at work and complete the Units while carrying out their everyday tasks in their customer service role.

Predominantly, delivery and assessment in centres is based on observation of the candidates, products of work and questioning to cover the knowledge aspects of the Award. Evidence can be presented in a portfolio but must be presented in a manner which indicates that the candidate is able, through their customer service role to meet the components of the standards as set out in the Units of this Award, ie Performance Criteria, knowledge and understanding and Evidence Requirements.

Candidates should be guided through the process of portfolio building by their assessor who can help them to prepare and implement assessment plans and also offer guidance and support.

Some centres cover the knowledge and understanding requirements by using specific questions which candidates have to answer. Others encourage candidates to meet the knowledge and understanding requirements through performance and personal statements which explain how the evidence submitted demonstrate competence against the Performance Criteria in the Units. Any gaps in the knowledge requirements can be filled by asking the candidate to respond to specific questions.

### 6.1 Sequencing/integration of Units

Delivery of the Award is at the discretion of centres but the Units in this Award are work-based, therefore the evidence must be produced through the candidate's customer service role.

Centres can choose to sequence the Units in a way which makes sense in terms of the candidates' job role and the optional Unit selected. It may also be possible depending on the optional Unit select to integrate the delivery and assessment of both Units.

### 6.2 Recognition of Prior Learning

SQA recognises that candidates 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 candidate 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](http://www.sqa.org.uk).

The following sub-sections outline how existing SQA Unit(s) may contribute to this Group Award. Additionally, they also outline how this Group Award may be recognised for professional and articulation purposes.

### **6.2.1 Articulation and/or progression**

Successful achievement of the Award in Customer Service at SCQF level 5 could allow candidates to progress to the full SVQ 2 in Customer Service at level 5 or the National Certificate in Business at SCQF level 5.

### **6.3 Opportunities for e-assessment**

As outlined earlier, the evidence for this Award must be come from the work place and can therefore be generated in the form of an e-portfolio.

## **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 candidates 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](http://www.sqa.org.uk/assessmentarrangements).

### **Internal and external verification**

All instruments of assessment 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](http://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 candidate 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](http://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. Centres are advised to check SQA's APS Navigator to confirm they are using the up to date qualification structure.

**NOTE:** Where a Unit is revised by another Unit:

- ◆ No new centres may be approved to offer the Unit which has been revised.
- ◆ Centres should only enter candidates for the Unit which has been revised where they are expected to complete the Unit before its finish date.

Version Number	Description	Date

## Acknowledgement

SQA acknowledges the valuable contribution that Scotland's colleges have made to the development of this qualification.

## 9 General information for candidates

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.

The Award in Customer Service at SCQF level 5 is made up of one mandatory SVQ Unit — *Give Customers a Positive Impression of Yourself and Your Organisation* — and a range of optional SVQ Units from which you must select one. The optional Units cover different forms of communication with customers (eg face-to-face, written, telephone, social media); delivering reliable customer service and resolving customer service problems.

SVQs and SVQ Units are based on National Occupational Standards which are designed to show that someone who achieves the Unit or full SVQ is competent in that particular area. Because the Award is made up of SVQ Units, you must be able to provide evidence to satisfy the requirements of the Unit from actual work. This may be a full time or part-time job or voluntary work.

This Award will help you to understand what's required to make a positive impression with customers and deal effectively with customers' needs.

The purpose of this Award is, therefore, to develop your skills and knowledge to:

- ◆ enable you to communicate with customers to create a positive impression of yourself and the organisation you are working for.
- ◆ develop good communication and effective listening skills.
- ◆ adapt your behaviour in response to different customer behaviours.
- ◆ provide customers with appropriate information to meet their needs.

You will be guided through the Units by an adviser/assessor who will help you plan for assessment and will advise and help you on how to prove that you can meet the standards in the Units. You will prove that you can meet the required standards by gathering evidence from your place of work - this will include things that you have done, and are doing, in your customer service role. You will gather your evidence together in a portfolio (which could be an e-portfolio) and you will be able to use this to prove that you are a competent in terms of the requirements of the Units of this Award.

The Customer Service Award is a qualification in its own right but it will also help you to progress to further customer service qualifications such as the full SVQ 2 in Customer Service at SCQF level 5 or the National Certificate in Business at SCQF level 5.

We hope that you enjoy undertaking this Award and that it is a stimulating learning experience for you.

# Appendix 1: Assessment Strategy for the Award in Customer Service

## 1 Introduction

This Assessment Strategy provides the criteria SQA approved centres must meet for the assessment of the Award in Customer Service. This assessment strategy is derived from the Customer Service Assessment Strategy developed by Skills CFA, the government recognised standards setting body for customer service SVQs. It outlines the criteria in relation to:

- ◆ requirements of assessor and verifiers
- ◆ evidence
- ◆ simulation
- ◆ realistic work environment (RWE).

In addition to the criteria outlined in this document, centres must meet the requirements of SQA's Quality Assurance Criteria<sup>1</sup>.

## 2 Requirements of assessors and internal verifiers

### Assessors

The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, assessors must:

- ◆ be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.
- ◆ hold or be working towards an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards.

It is the responsibility of approved centres to select and appoint assessors.

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<sup>1</sup> *Systems and Approval Guide (SQA) Pub code: AA7091*

[http://www.sqa.org.uk/files\\_ccc/Systems\\_and\\_Qualification\\_Approval\\_Guide.pdf](http://www.sqa.org.uk/files_ccc/Systems_and_Qualification_Approval_Guide.pdf)

## Internal verifiers

A primary responsibility of internal verifiers (IVs) is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IVs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IVs

IVs must:

- ◆ be 'occupationally competent'. IVs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business.
- ◆ hold or be working towards an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IVs holding older qualifications must be able to demonstrate that they are verifying to the current standards.

**Assessors and internal verifiers working towards an appropriate qualification** must be supported by a qualified assessor or internal verifier throughout the period of completing the qualification. This must include monitoring of assessment or verification decisions which may be achieved by sampling of reports and evidence by a qualified assessor or internal verifier. Evidence of the support provided and monitoring of assessment or verification decisions must be recorded and made available to SQA on request.

## Continuing Professional Development (CPD)

Skills CFA and awarding organisations requires all assessors, and verifiers to maintain current Customer Service competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

## 3 Evidence

### Evidence from Workplace Performance

- ◆ Evidence of occupational competence of all competence units at any level, should be generated and collected through performance in the workplace.

## 4 Simulation

- ◆ Simulation can be used for SVQs Units. However, where simulation is used for SVQ units, it should only be for small parts of the units (at any level), in exceptional circumstances only.
- ◆ The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- ◆ Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found below.

## 5 Realistic Working Environment Guidelines

It is essential that assessment undertaken in a RWE reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in employment.

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

- ◆ The RWE is managed as a real work situation.
- ◆ Assessment must be carried out under realistic business pressures.
- ◆ All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations.
- ◆ Candidates must be expected to achieve a volume of work comparable to normal business practices.
- ◆ The range of services, products, tools, materials and equipment that the candidates use must be up to date and available.
- ◆ Account must be taken of any legislation or regulations in relation to the type of work that is being carried out.
- ◆ Candidates must be given workplace responsibilities to enable them to meet the requirements of the units.
- ◆ Customer perceptions of the RWE is similar to that found in the work situation being represented.
- ◆ Candidates must show that their productivity reflects those found in the work situation being represented.