

SVQ in Customer Service level 2

Candidate Guidance and Portfolio

Award Code: G89X 22

Candidate name:

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The National Occupational Standards which form the basis of this award were developed by the Institute of Customer Service. This document is for candidate use only and should not be used as substitute for the National Occupational Standards.

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Index

Section	Contents	Page
1	General information about SVQs <ul style="list-style-type: none">— Introducing SVQs— Who offers SVQs?— What is the structure of an SVQ?— An example of an SVQ Element— How are SVQs achieved?— How are SVQs assessed?— Who does what in SVQs?— What is evidence?— When can simulation be used?— Integration of assessment	3
2	How to compile your portfolio (including worked examples) <ul style="list-style-type: none">— General information— Evidence Collection Process— Planning your portfolio— Starting your portfolio— Contents checklist— Collecting your evidence— Presenting your evidence— Referencing your evidence— Worked examples<ul style="list-style-type: none">1 – Index of evidence2 – Unit progress record3 – Element achievement record4 – Personal statement5 – Observation record6 – Witness testimony7 – Record of questions and candidate's answers	11
3	The units and the recording documents for your SVQ <ul style="list-style-type: none">— The structure of the SVQ in Customer Service level 2— Unit Progress Record— Units— Glossary of terms	25

Section	Contents	Page
4	Blank recording forms	339
	— Portfolio title page	
	— Personal profile	
	— Contents checklist	
	— Index of evidence	
	— Personal statement	
	— Observation record	
	— Witness testimony	
	— Record of questions and answers	
	— Element Achievement Record	

Section 1 — General information about SVQs

Introducing SVQs

The qualification you are undertaking is a Scottish Vocational Qualification (SVQ).

SVQs are work-based qualifications which assess the skills and knowledge people have and need to perform their job role effectively. The qualifications are designed using national occupational standards.

For each industry sector there is a Standards Setting Body (SSB) which is made up of representatives from the industry or profession and it is the SSB's responsibility to develop the national occupational standards.

These standards define what employees, or potential employees, must be able to do, how well and in what circumstances to show they are competent in their work.

The Standards Setting Body for Customer Service is: Institute of Customer Service.

Access to SVQs is open to all and you can be assessed either against a particular Unit(s) or against the full SVQ. There are no entry requirements, no prescribed method of delivery, no time constraints for completion or age limits.

SVQs are available at five levels of achievement which reflect the various technical and supervisory skills, knowledge, and experience which employees should have as they progress in their industry.

Who offers SVQs?

An organisation which offers SVQs is called a Centre. This may be a school, college, university, employer, training provider or a combination of these. The Centre has responsibility for the quality of the qualification and is required to work within an awarding body's policies and guidelines.

The Scottish Qualifications Authority (SQA) is your awarding body for this SVQ. This means that we are an organisation approved by government to design qualifications and awards. An awarding body endorses candidates' certificates so that an employer can be sure the qualification has gone through a rigorous and effective assessment process. SQA provides qualifications throughout the world and was formed by the merger of the Scottish Examinations Board (SEB) and the Scottish Vocational Education Council (SCOTVEC).

What is the structure of an SVQ?

All SVQs have a common structure and consist of standards which can be broken down into various parts:

Units and Elements	Units define the broad functions carried out in your particular job and are made up of a number of Elements . Each Element describes a specific work activity which you have to perform and may relate to skills or to the demonstration of knowledge and understanding.
Performance criteria	The level and quality of how you should carry out these activities is determined by a number of statements called Performance Criteria . Performance Criteria are used to judge your competence.
Range/Scope statements	A range statement tells you in what circumstances you must be able to prove your competence and allows you to demonstrate that you can carry out tasks in different circumstances. Items included in the range statements must not be treated as optional. Range statements are also called scope in some National Occupational Standards.
Evidence requirements	The Evidence requirements specify the amount and type of evidence which you will need to provide to your assessor to show that you have met the standards specified in the performance criteria and in all the circumstances defined in the range statements.
Knowledge and understanding	The section on knowledge and understanding states what you must know and understand and how this knowledge applies to your job.

If you are not yet clear about how we define standards — just remember that the standards have been developed by experts within your industry or profession and that all candidates aiming for this particular SVQ are being assessed against the same standards.

You will find an example of an SVQ element overleaf.

An example of an SVQ Element

UNIT: (1) Working safely in an engineering environment

This is the **UNIT** title — it describes a role and task.

Element 1 Comply with statutory regulations and organisational requirements

This is the **ELEMENT** title. It describes part of the main role and task.

Performance Criteria

You must ensure that you:

PERFORMANCE CRITERIA set out the standard of performance you need to demonstrate consistently to claim competence in a particular **Element**.

- 1 Describe your duties and obligations (as an individual) under the Health and Safety at Work Act 1974.
- 2 Comply with Statutory Regulations at all times.
- 3 Comply with organisational safety policies and procedures at all times.

Range

This means you need to cover:

- 1 Relevant sections of the Health and Safety at Work Act 1974 (eg with regard to your duties to work in a safe manner, not to interfere with remove or misuse equipment provided for the safety of yourself and others, not to endanger others by your acts or omissions).

The **RANGE** defines the various circumstances in which you must be able to prove you are competent.

You must cover all of the items in the **range** statement.

Evidence Requirements

The things you must prove that you can do:

You need to demonstrate that you understand your duties and obligations under both statutory regulations and organisational requirements and you can do this by:

- 1 Giving an adequate explanation of the duties and responsibilities of every individual as described in the Health and Safety at Work Act 1974.
- 2 Ensuring that whilst carrying out your work and/or visiting other areas of the working environment you are aware of the specific safety requirements and regulations governing your activities.

Knowledge and Understanding

You must prove that you know and understand:

- 1 The roles and responsibilities of your self and others under the Health and Safety at Work Act 1974.
- 2 The general regulations that apply to you being at work.
- 3 The specific regulations which govern your work activities.

The **KNOWLEDGE AND UNDERSTANDING** Requirements state what you must know and understand and how this knowledge applies to your job.

How are SVQs achieved?

When you consistently meet the standards described in the elements and show that you have the required skills and knowledge across the range, you can then claim that you are *competent* in each Unit. You can claim certification for single Units or whole awards. Your Centre will register your claim to competence through the Awarding Body. The Awarding Body you are registered with for this SVQ is the Scottish Qualifications Authority (SQA).

Scottish Qualifications Authority
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58 Robertson Street
Glasgow
G2 8DQ

The process of gaining an SVQ is flexible and depends on your needs. At the beginning of the process your assessor will review your existing competence in relation to the standards and identify the most suitable SVQ. The level you start at will depend on the type and breadth of your current job role together with your past experience, skills and any relevant prior learning.

To achieve an SVQ, or a Unit of an SVQ, you must:

- ◆ Demonstrate you meet the requirements of the performance criteria by collecting appropriate evidence as specified by the evidence requirements. This evidence is assessed against the national standards by a qualified assessor, who will be allocated to you by your Centre. This will usually be someone who knows you, such as a manager or supervisor.

Evidence may come from:

- ◆ the **accreditation of prior learning** — where evidence relates to past experience or achievements
- ◆ **current practice** — where evidence is generated from a current job role
- ◆ a **programme of development** — where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- ◆ a combination of these

How are SVQs assessed?

Assessment is based on what you can do and involves you, your assessor, an internal verifier and an external verifier — see "Who does what in SVQs" on the following page.

You will be asked to prove you are competent by providing evidence which shows:

- ◆ you can perform all the specified tasks consistently to the required standard (**performance criteria**)
- ◆ you understand why you are doing things (**knowledge and understanding**)
- ◆ you can apply the required skills in different ways (**range**)

Assessment is flexible and you can be certificated for each Unit you successfully achieve, even if you do not complete the full SVQ. There is no set period of time in which you need to complete a Unit. However, you and your assessor should still set target dates for completing each Unit, otherwise your qualification could go on forever. Be realistic though, as there are many factors such as your previous experience, demands within your workplace and an availability of resources which will affect how quickly you are able to achieve the qualification.

Who does what in SVQs?

A number of individuals and organisations have parts to play in SVQ assessment. Their roles have been designed to guarantee fair, accurate and consistent assessment.

	<i>Who are they?</i>	<i>What is their role?</i>
Candidates	The person who wants to achieve the SVQ — in this case, you.	Need to show they can perform to national occupational standards in order to be awarded an SVQ or Unit(s).
Assessors*	An experienced person in the same area of work as the candidate eg supervisor.	Judge the evidence of a candidate's performance, knowledge and understanding against the national occupational standards. Decide whether the candidate has demonstrated competence. Provide guidance and support to the candidate. Assist with planning assessments, giving feedback and recording candidate progress.
Internal Verifiers*	Individuals appointed by an approved Centre to ensure the quality of assessment within the Centre.	Advise assessors and maintain the quality of assessment in a Centre. Systematically sample assessments to confirm the quality and consistency of assessment decisions.
Approved Centres	Organisations approved by awarding bodies to coordinate assessment arrangements for SVQs.	Manage assessment on a day to day basis. Must have effective assessment practices and internal verification procedures. Must meet criteria laid down by awarding bodies and be able to provide sufficiently-competent assessors and internal verifiers.
External Verifiers*	Individuals appointed by the Awarding Body to ensure that standards are being applied uniformly and consistently across all Centres offering the SVQ.	Check the quality and consistency of assessments, both within and between Centres, by systematic sampling. Make regular visits to Centres to ensure they still meet the criteria to deliver SVQs.

* Assessors and internal and external verifiers are required to have occupational expertise in the SVQs which they are assessing/verifying. They must also have, or be working towards, an appropriate qualification in assessment and verification.

What is evidence?

To claim competence for an SVQ unit you need to gather evidence which shows you have met the standards. It is important that your evidence is easily understood so that it can be checked against the standards, by both your assessor, your Centre and the Awarding Body.

Evidence can take many forms including:

- ◆ direct observation of your performance by your assessor
- ◆ products of your work
- ◆ authenticated statement — witness testimony
- ◆ personal statement
- ◆ outcomes from questioning
- ◆ outcomes from simulation
- ◆ case studies
- ◆ assignments or projects
- ◆ Accreditation of Prior Learning (APL) — evidence from the past

It is important that your evidence is:

- ◆ **valid** — it relates to the SVQ standard you are trying to prove
- ◆ **authentic** — the evidence, or an identified part of it (eg a report) was produced by *you*
- ◆ **consistent** — achieved on more than one occasion
- ◆ **current** — usually not more than two years old
- ◆ **sufficient** — covers all the performance and knowledge requirements laid down in the standards

Your evidence may be collected through a range of sources, such as employment, voluntary work, training programmes and interests/activities which you perform outside your work. It can also be produced in various formats, eg your own reports; testimonies from colleagues, supervisors or members of the public; projects; models; audio tapes, photographs; videos.

When you first begin your SVQ, you and your assessor should identify all the Units and Elements where you can use **integration of assessment**. Further details about integration of assessment can be found on page 10.

Demonstrating knowledge, understanding and skills

In order to meet the standards, you may also be required to prove knowledge and understanding. Each Unit contains a list summarising the knowledge, understanding and skills a candidate must possess. Evidence of how these have been achieved and applied could be included in the performance evidence as one or all of the following:

- ◆ descriptions of why a particular approach was used
- ◆ personal reports about the learning process
- ◆ reflective reports which include how a theory or principle was applied
- ◆ assessment interviews
- ◆ assessment tests
- ◆ responses to questioning

These should be included in your portfolio.

How will my assessor check I have the knowledge and understanding listed in the standards?

For some Units, it will be clear to your assessor that you have the required knowledge and understanding from how you carry out your work. This is often referred to as *knowledge and understanding apparent from performance*. There will be other occasions though, when your assessor will be unsure if you know why, for example, it is important to give information to clients in certain situations. This could be because your assessor has not had the opportunity to observe all the performance criteria and range during assessment. In these situations, your assessor may wish to assess your knowledge and understanding by asking you some questions. These questions can be given orally or in writing, but will be recorded in your portfolio as evidence.

Your assessor could also check you have the required level of knowledge and understanding by asking you to produce personal statements or to complete a project or assignment.

What if I have previous experience and knowledge and understanding from work and other qualifications?

If you have previous work experience, skills, and knowledge and understanding which you feel is relevant to your SVQ, you should tell your assessor about it. Your assessor may ask you for more proof in the form of letters from previous employers/training providers or details about any courses you have completed.

For example, you may have achieved an HNC in a relevant subject in which case your assessor may feel that you already have some of the knowledge and understanding required for the SVQ.

The process of matching your previous experience and learning is often referred to as the Accreditation of Prior Learning (APL). The purpose of this process is to try and give you some credit towards your SVQ for things you can already do to the national standard. Your assessor judges the evidence available and matches it against the requirements of the SVQ. This means that your assessor should not have to assess you for these things all over again.

However, the success of this process depends on *you* telling *your assessor* what previous work experience or knowledge and understanding you have and how you think it is relevant to your SVQ. The more information you can supply to support your claims, the easier it should be to convince your assessor that you are competent.

When can simulation be used?

Throughout your SVQ, the emphasis is on you being able to carry out real work activities so assessment will normally be carried out in the workplace itself.

There may be times, however, when it might not be appropriate for you to be assessed while you are working. For example your SVQ might require you to carry out emergency or contingency procedures (for safety or confidentiality reasons) or your job role may not cover all aspects of the qualification. In such instances, when you have no other means of generating evidence, **simulation** might be appropriate.

Simulation is any structured exercise involving a specific task which reproduces real-life situations. Care must be taken though to ensure that the conditions in which you are assessed *exactly* mirror the work environment ie it is a **realistic working environment**.

You and your assessor should check the assessment strategy for your SVQ carefully to find out the Standards Setting Body's (SSB's) view of what constitutes a realistic working environment. Some SSB's stipulate the specific elements which are suitable for this approach.

Integration of assessment

It is not necessary for you to have each Element assessed separately — doing so could result in assessment which takes too long and places too great a burden on you and your assessor.

There will be instances when you will be able to use one piece of evidence to prove your competence across different Elements or Performance Criteria. You may even find that evidence is relevant for different Units — this is called **integration of assessment**.

When you first begin your SVQ, you and your assessor will spend time looking at the standards, planning how much time you are both able to devote to the qualification and drawing up an action plan.

At this stage, you should identify any activities which relate to more than one unit or outcome and arrange for the best way to collect a single piece of evidence which satisfactorily covers all the Performance Criteria.

If you are going to integrate assessments, make sure that the evidence is cross-referenced to the relevant Units. Details of how to cross reference your evidence can be found in Section 2 "How to compile your portfolio".

Section 2 — How to compile your portfolio (including worked examples)

General information

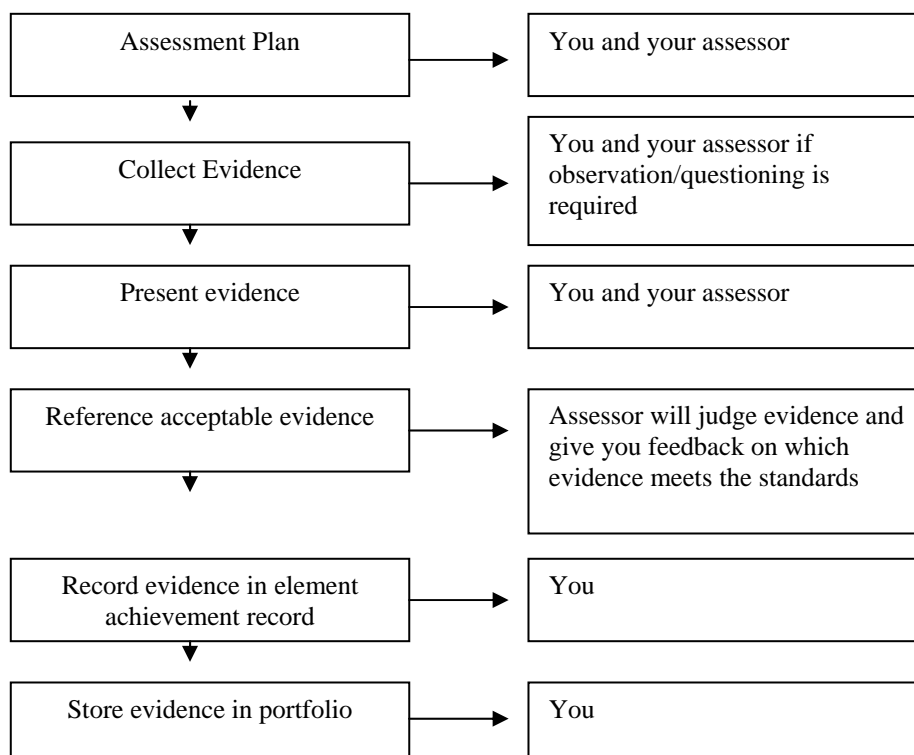
A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

The production of a well-organised, clearly labelled portfolio which relates each piece of evidence to the relevant outcomes and Performance Criteria requires a careful methodical approach. When your assessor looks through your portfolio, they will find the task of making judgements about your competence much easier if the information in it is presented in a logical sequence.

You will need to present your evidence in a format that is easy to read and in which materials can be added or taken away. This section gives suggestions on how to lay out and present your evidence and includes worked examples. There are also forms and matrices which will assist you to chart your progress through the award.

You do not have to lay out your evidence in the way suggested but you may find it helpful to do so. Each portfolio will be different in content but all should include information about you (the candidate), the organisation where you are undertaking your qualification, the assessor and so on.

Evidence Collection Process



Planning your portfolio

Start by carefully reading through the standards and, together with your assessor, decide which Units you might like to work on first. You do not have to do the Units in order. There may be some Units that relate to tasks which you carry out on a regular basis, therefore making it easier to collect evidence right away. Alternatively, there may be activities in other Units which you only undertake now and again, these can be left until the opportunity arises for you to collect evidence.

Before you start looking for different kinds of evidence and deciding if they should be included in your portfolio, you will find it helpful to plan how you will carry out the tasks and how long they are going to take.

The plan is usually referred to as an “**assessment plan**”. It should be produced in discussion with your assessor and will set out the different stages in developing your portfolio. You will probably want to produce a plan for each Unit.

It is unlikely that you will be able to complete all of the Units straight away and you should therefore think about starting with those Units where you have a lot of experience and in which you work well. You should also remember to identify any opportunities for **integration of assessment**.

We have provided you with a “**Unit progress record**” — see Example 2. Each time you complete a Unit, your assessor should sign and date the relevant section on the form. At this stage, it might be a good idea to check that all your evidence and recording documents have been completed correctly and can easily be located. You can then circle the reference number of that Unit in the checkboxes at the top of the form so that you can see at a glance what stage you are at in your SVQ.

Starting your portfolio

Make sure that you clearly label your portfolio (or disk if you are recording your evidence electronically) with your name together with the title and level of the award.

Your portfolio will need a *title page* and a *contents page*. You should also complete a *Personal Profile* which records details about yourself and your job as well as providing information about your employer, training provider or college. Blank samples of these forms are provided in Section 4.

We recommend that you compile your portfolio in the following order:

Title Page
Contents Checklist
Personal Profile
Unit Progress Record
Completed Element Achievement Records
Index of Evidence
Pieces of evidence
Glossary of terms
Standards

Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

	Completed?	Page/Section number
Title page for the portfolio	<input type="checkbox"/>	
Personal profile		
◆ your own personal details	<input type="checkbox"/>	
◆ a brief CV or career profile	<input type="checkbox"/>	
◆ description of your job	<input type="checkbox"/>	
◆ information about your employer/training provider/college	<input type="checkbox"/>	
Unit Assessment Plans	<input type="checkbox"/>	
Unit progress record	<input type="checkbox"/>	
Completed Element Achievement Records for each unit		
◆ signed by yourself, your assessor and the internal verifier (where relevant)	<input type="checkbox"/>	
◆ Evidence reference numbers included	<input type="checkbox"/>	
Index of evidence (with cross-referencing information completed)	<input type="checkbox"/>	
Evidence (with reference numbers)		
◆ observation records	<input type="checkbox"/>	
◆ details of witnesses (witness testimony sheets)	<input type="checkbox"/>	
◆ personal statements	<input type="checkbox"/>	
◆ products of performance	<input type="checkbox"/>	

Collecting your evidence

All of the evidence which you collect and present for assessment must be relevant to your SVQ. Your assessor will help you choose which pieces of evidence you should include.

We have provided blank forms in Section 4 of this document, which you can photocopy to help you record and present your evidence. Although we have provided you with sample forms, your Centre may have their own recording documents which they would prefer you to use.

Some of these forms eg **observation records** and the **record of questions and answers**, will be completed by your assessor. Other forms (**witness testimonies**) will be used by people other than your assessor to testify that they have observed you doing your job, and there is one for you to complete called a **personal statement**.

Explanations are given below about how and when these forms should be used.

Observation record (Example 5)

The observation record is used by your assessor to record what tasks you have performed and to what standard. There is also a section for your assessor to note which other Units or outcomes are covered by this evidence ('integration of assessment').

The assessor will discuss with you which performance criteria and range you have successfully achieved and give you feedback. This form should then be given a reference number and included in your portfolio as part of your evidence.

Witness testimony (Example 6)

There may be occasions when your assessor is not available to observe you carrying out certain aspects of your job. In such instances, it may be appropriate for another person to comment about your performance by completing a statement called a 'witness testimony'.

Witness testimony should only be used as supporting evidence and should:

- ◆ be provided by a person, not related to you, who is in a position to make a valid comment about your performance eg supervisor, line manager or possibly a client/customer
- ◆ contain comments which specifically relate your performance to the standards
- ◆ be authenticated by the inclusion of the witness's signature, role, address, telephone number and the date

It is unlikely that your assessor would make an assessment decision based on witness testimony alone. They would normally supplement this type of evidence with questioning.

Record of questions and candidate's answers (Example 7)

This form is used to record any questions which your assessor may ask, to establish whether you have the required level of knowledge and understanding associated with each Unit. There is also space on the form for your answers to be noted.

Personal statement (Example 4)

There will be times when you need to put a piece of your evidence in context for your assessor so that they can decide if it is relevant to your SVQ. You can complete personal statements to help you do this — these can relate either to the pieces of evidence or to each outcome or Unit.

For example, you may refer to paperwork which is often used in your organisation to help you pass on information to a colleague. It may not be clear to an assessor why you are communicating to your colleague in this way and a **brief** explanation of the paperwork and why it is relevant to a particular part of your SVQ may be required.

A personal statement might also be used to record your experience of something, such as, how you handled a specific situation. This can be documented in your personal statement and should be a description of what you did, how you did it and why you did it. It will also allow you to include the people who were present and either assisted you or witnessed your actions. This, in turn, might identify who you should approach for 'witness testimony'. In your personal statement you could also refer to product evidence that you have produced (eg reports, notes, completed forms), these can also be included as evidence in your portfolio.

The personal statement can be a piece of evidence in itself and should therefore be included in your portfolio.

Presenting your evidence

It is important to present all of your evidence in a clear, consistent and legible manner. Your assessor will then find it much easier to make appropriate judgements about the quality, sufficiency and currency of the materials you are putting forward for consideration.

It is not necessary to produce all of your evidence in typewritten format — some hand-written pieces of evidence, such as notes, will be perfectly acceptable.

There may also be items of evidence which you cannot physically include in your portfolio. This might be for confidentiality reasons or it could be that something which you have produced as part of your day-to-day work is normally kept in a filing cabinet or stored electronically in a PC.

In compiling your portfolio, we suggest that anything you produce as part of your day-to-day work is kept in its normal location, but those pieces of evidence which have been produced specifically for your SVQ, eg witness testimony statements or personal statements, are filed in your portfolio. However, assessors and verifiers should be able to locate and access your evidence at all times. It is, therefore, very important that you clearly reference every item of evidence.

Referencing your evidence

Your assessor, as well as the internal and external verifiers, will need to find their way around your portfolio, so you should give each piece of evidence a number.

Remember, that where you have used "integration of assessment", you need to give details of all the units and elements which are linked to a specific piece of evidence. The links should be noted on the pieces of evidence themselves as well as on the index of evidence (cross-referencing).

How to complete the Index of evidence (Example 1)

You should complete an *index of evidence* sheet and file it immediately before the actual pieces of evidence in your portfolio.

The index of evidence should be completed by:

- ◆ entering the evidence number in the first column
- ◆ giving a brief description of each piece of evidence in the second column
- ◆ explaining where the evidence can be found in the third column

You must make sure that the information contained in the evidence index is accurate when you give your portfolio to your assessor, particularly in relation to where the evidence can be located.

Completing the Element Achievement Records (Example 3)

There is an Element achievement record for every element within this portfolio. These records have been designed to allow you to record the evidence you have gathered for each element. Each record has boxes across it which represent the performance criteria, range statement, evidence requirements and knowledge and understanding statement, these will differ from element to element so it is important to make sure you are using the right one. Whilst collecting your evidence you should use these grids to display the performance criteria, range, knowledge and understanding and evidence requirement that piece of evidence relates to. In the first box write the evidence index number you have given to that piece of evidence. In the second box give a brief description of the evidence, then tick against the relevant performance criteria, range, evidence requirements and knowledge and understanding.

Worked examples

To give you a clearer picture of how to compile your portfolio, you will find worked examples of the various forms over the next few pages. You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

Index of evidence

(Example 1)

SVQ title and Level: Using IT at Level 3

Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)
1	Action plan identifying customer requirements	Yes	
2	Personal Statement	Yes	
3	Witness Testimony	Yes	
4	Record of Questions and Answers	Yes	
5	Log of configuration details and errors	Yes	
6	Observation Checklist	Yes	
7	Procedure for shutting down system	Yes	
8	Company media storage policy	No. Can be found with General Manager	

Unit progress record

(Example 2)

Qualification and Level: Using IT at Level 3

Candidate: Anne Thomas

To achieve the whole qualification, you must prove competence in **mandatory** units and **optional** units.

Unit Checklist — circle the reference number of each unit as you complete

Circle the reference numbers as you complete each unit. You can then easily see what stage you have reached in your SVQ.

Mandatory	206	301	302	303	308		
Optional	305	306	311	312	326	327	

Mandatory units

Unit Number	Title	Assessor	Date
206	Ensure your own actions reduce risks to H&S		
301	Select and enable IT for use	P. Jones	28/4/2000
302	Maintain the Software Environment	P. Jones	28/4/2000
303	Develop and maintain the effectiveness of the IT working environment	P. Jones	8/4/2000
308	Develop your own effectiveness and professionalis		

This section of the form is for your assessor to sign each time you successfully achieve a unit.

Optional Units

305	Design and produce doc		
306	Design and produce spreadsheets		
311	Design and use databases		
312	Design & produce documents using graphics		
326	Design & produce presentations using IT		
327	Control the use of electronic communication		

Element achievement record

(Example 3)

Unit title: Select & enable IT for use

Element: 301.1 Select & configure equipment for use

Evidence Index No	Description of Evidence	Performance Criteria								Range			Knowledge & Understanding					
		a	b	c	d	e	f	g	h	1	2	3	K1	K2	K3	K4	K5	
1	Action Plan	✓	✓			✓				✓								
2	Personal Statement	✓	✓			✓				✓								
3	Copy of Legislation			✓	✓							✓						
5	Record of Questions & Answers	✓	✓	✓		✓				✓	✓	✓						
6	Log of Configuration Details							✓	✓	✓		✓						

These numbers relate to your Evidence Index and will allow your assessor to find your evidence easily

Give a brief description of the evidence you are offering for assessment against each performance criteria, range and piece of knowledge and understanding

As you collect your evidence for assessment you should tick the relevant boxes. There is a box which represents each performance criteria and range in the element

Candidates should enter which areas of knowledge and understanding that piece of evidence covers.

Candidate: _____ Assessor: _____ IV: _____

Date: _____ Date: _____ Date: _____

Personal statement

(Example 4)

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, pcs, and range covered
4/4/00	1	<p>Statement that I know and understand customer requirements. Names of customer and software and hardware requirements in portfolio.</p> <p>Statements that I understand how to set up, equipment, configure software that met customer requirements. Details of equipment and software with dates are listed in portfolio.</p>	1	301.1.a,b,e Range 1

Candidate signature: Anne Thomas

Date: 2/4/2000

Observation Record

(Example 5)

Unit/Element(s): (301) Select and Enable IT for Use

Candidate: Anne Thomas Date of observation: 28/4/2000

Evidence index number: 8

Skills/activities observed:	PCs and range covered:
Saving and storing files	Element 301.3 PCs: a-f Range: materials (consumables, removable storage media), regulations (current legislation, manufacturer's instructions, organisational procedures), system (application software, hardware, system software).

Knowledge and understanding apparent from this observation:

Candidate can save and organise files. She can delete unwanted files and can shut down system according to organisation's procedures and manufacturer's instructions.

Other units/elements to which this evidence may contribute:

302.1.b,c Range 1,3

Assessor comments and feedback to candidate:

I can confirm the candidate's performance was satisfactory.

Assessor signature: Peter Jones

Date: 28/4/2000

Candidate signature: Anne Thomas

Date: 28/4/2000

Witness testimony

(Example 6)

SVQ title and Level:	Using IT Level 3
Candidate name:	<i>Anne Thomas</i>
Evidence index no:	4
Where applicable, evidence no. to which this testimony relates:	
Element(s):	301.2 Range: 1
Date of evidence:	8/4/2000
Witness name:	Ian Cummings
Designation/relationship to candidate:	Line manager
Details of testimony:	

I can attest that I observed Anne Thomas following company and national regulations in the use of software. She understands and has knowledge of these regulations and I observed her following them when selecting and configuring software.

I can confirm the candidate's evidence is authentic and accurate.

Witness signature: *Ian Cummings*

Name: **Ian Cummings**

Date: **8/4/2000**

Please tick the appropriate box:

A1/A2 or D32 / D33 Award

Familiar with the SVQ standards to which the candidate is working

Record of questions and candidate's answers (Example 7)

Unit: 301 Select & enable IT for use	Element(s): 1
Evidence index number: 5	
<p>Circumstances of assessment: As part of the staff induction scheme IT staff are regularly interviewed and asked about their knowledge and skills. Anne Thomas was interviewed on the 21 March 2000 and below is a summary of the interview where it relates to her knowledge of resources and problem solving.</p>	
<p>List of questions and candidate's responses:</p> <p>Q: If a member of staff asked you for a particular piece of equipment, would procedures would you follow?</p> <p>A: I would ensure that a hardware requisition form has been filled out with the rational for needing such equipment, countersigned by their line and general managers. If approved, next step would be to ask the member of staff if they need specific training. Pc 301.1.a,b,e Range 1,2,3</p> <p>Q: You discover that a member of staff has installed a piece of software on their workstation PC. What do you do?</p> <p>A: If they installed it themselves then this is a serious breach of company regulations and I would inform the IT manager. I would then remove the software. Pc 301.1.c, Range 2,3</p>	
Assessor's signature: Davinder Singh	Date: 21/3/2000
Candidate's signature: <i>Anne Thomas</i>	Date: 21/3/2000

Section 3 — The units and recording documents for your SVQ

Unit Progress Record

Qualification and level: Customer Service level 2

Candidate: _____

To achieve the whole qualification, you must prove competence in all **two mandatory** Units plus any **five optional** Units. The **five optional** Units must include at least **one** Unit from each theme.

Please note the table below shows the SSB identification codes listed alongside the corresponding SQA unit numbers. It is important that the SQA unit numbers are used in all your recording documentation and when your results are communicated to SQA. SSB identification codes are **not valid** in these instances.

Unit Checklist — circle the reference number of each unit as you complete it.

Mandatory	1	5							
Optional	9	10	11	12	13	14	15	16	17
	21	22	23	6	31	36	37	38	

Mandatory units (*all units should be completed*)

SQA Unit Number	SSB Unit Number	Title	Assessor	Internal Verifier	Date
F04T 04	1	Prepare yourself to deliver good customer service			
F05E 04	5	Provide customer service within the rules			
Optional Units: <i>Candidates must achieve five of the following Units:</i>					
Optional Units: Impression and image					
F049 04	9	Give customers a positive impression of yourself and your organisation			
F05B 04	10	Promote additional services or products to customers			
F04X 04	11	Process customer service information			
F04H 04	12	Live up to the customer service promise			
F04K 04	13	Make customer service personal			

SQA Unit Number	SSB Unit Number	Title	Assessor	Internal Verifier	Date
Optional Units: Impression and image (cont)					
F04B 04	14	Go the extra mile in customer service			
F03T 04	15	Deal with customers in writing or using ICT			
F035 04	16	Deal with customers face to face			
F025 04	17	Deal with customers by telephone			
Optional Units: Delivery					
F03Y 04	21	Deliver reliable customer service			
F03W 04	22	Deliver customer service on your customers' premises			
F05M 04	23	Recognise diversity when delivering customer service			
Optional Units: Handling problems					
F05G 04	6	Recognise and deal with customer queries, requests and problems			
F05P 04	31	Resolve customer service problems			
Optional Units: Development and improvement					
F040 04	36	Develop customer relationships			
F05S 04	37	Support customer service improvements			
F041 04	38	Develop personal performance through delivering customer service			

UNIT (1) Prepare yourself to deliver good customer service

This Unit has the following elements:

- | | |
|------------------------|--|
| Element 1 (1.1) | Describe the customer service of your organisation to customers and/or colleagues |
| Element 2 (1.2) | Describe your organisation's products or services to customers and/or colleagues |

Unit Summary

This Unit sits within 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 have to work.

This Unit is all about how your organisation works, what it does and where you fit into that.

You need to know how your organisation works to provide good customer service. This means understanding who does what and being able to explain it to customers or colleagues. It also means you must understand what your role is within the organisation and what is expected of you. Each organisation offers a different package of products and services to its customers so you must understand and be able to explain what yours offers.

To provide good customer service you need to know and understand these things and use that knowledge skillfully.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts and producing tables and charts

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; using software
- ◆ May provide dual assessment opportunities for; operating the computer
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (1)

Prepare yourself to deliver good customer service

Key words and phrases for this Unit

- ◆ what the organisation does
- ◆ types of customers
- ◆ know where to find help
- ◆ give information
- ◆ receive information
- ◆ build a reputation
- ◆ company procedures
- ◆ services or products
- ◆ answer questions
- ◆ good customer service
- ◆ poor customer service
- ◆ keep information up to date

UNIT (1)

Prepare yourself to deliver good customer service

Element 1 (1.1)

Describe the customer service of your organisation to customers and/or colleagues

Performance Criteria

When you prepare to deliver good customer service you must consistently:

- 1 explain what your organisation does and the types of customers it has
- 2 describe who's who and who does what to provide customer service
- 3 describe who to go to for information or help when dealing with customer service issues
- 4 give examples of the kinds of information your colleagues may need from you so that they can give good service to customers
- 5 give examples of the ways an organisation could build a good reputation and the ways a reputation could be damaged
- 6 explain why company procedures are important to good customer service

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UNIT (1)

Prepare yourself to deliver good customer service

Element 1 (1.1)

Describe the customer service of your organisation to customers and/or colleagues

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (1)

Prepare yourself to deliver good customer service

Element 2 (1.2)

Describe your organisation's products or services to customers and/or colleagues

Performance Criteria

When you prepare to deliver good customer service you must consistently:

- 1 list your organisation's services or products
- 2 answer simple customer questions about your organisation's products or services
- 3 explain why good customer service is important for your organisation
- 4 explain the effects of providing poor customer service
- 5 explain how your job is important in providing good customer service
- 6 explain how you keep information about products or services updated
- 7 describe how you would know when a new or additional service or product is available

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UNIT (1)

Prepare yourself to deliver good customer service

Element 2 (1.2)

Describe your organisation's products or services to customers and/or colleagues

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (1)

Prepare yourself to deliver good customer service

Knowledge and Understanding

To be competent at preparing to deliver customer service you need to know and understand:

- 1a what the organisation does
- 1b what services or products the organisation provides
- 1c what the key features of the organisation's services or products are
- 1d what the key benefits of the organisation's services or products are
- 1e what the structure of the organisation is
- 1f what a customer is
- 1g who the organisation's customers are
- 1h what building an organisation's reputation means
- 1i what can damage an organisation's reputation
- 1j what customer service is
- 1k how customer satisfaction depends on customer expectations and service delivery
- 1l how customer service affects the success of the organisation
- 1m the key customer service requirements of the job
- 1n how company procedures contribute to consistent and reliable customer service
- 1n the kinds of information the organisation keeps about its customers

Evidence Requirements

- 1 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 realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

Evidence Requirements (cont)

- 2 You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation
- 3 Your evidence must show that you have carried out background work and given detailed consideration to the statements in this Unit before asking to be assessed. Where examples are requested, you should be able to give a range of examples to enable your assessor to be confident in your breadth of knowledge and competence in meeting the requirements of the Unit.
- 4 The evidence that you are competent to describe or explain the customer service principles contained in this Unit may be gathered through question and answer, either verbally or in writing, or it may be inferred by observation of your behaviour when delivering customer service.
- 5 Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, or any other method that makes your assessor confident that you have a good understanding of the language and concepts required for working in the field of customer service.
- 6 Your knowledge of the customer service principles and concepts must be explained or described from the context of a real work environment. This means that if the evidence is collected by simulation, that simulation must mirror an environment in which real customer service might be delivered.

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UNIT (1)

Prepare yourself to deliver good customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5) Provide customer service within the rules

This Unit has the following elements:

- | | |
|------------------------|---|
| Element 1 (5.1) | Follow organisation procedures |
| Element 2 (5.2) | Follow external regulation and legislation |

Unit Summary

This Unit sits within 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 have to work.

There are rules in organisations that limit what you can and cannot do for customers. Some rules are set by your organisation and some are defined by law and apply to everybody's jobs. Other rules are set by regulations that apply to particular industries.

You need to know your organisation's rules and procedures and how these limit what you can do for customers. You also need to be aware of the wider laws and regulations which are set outside of your organisation and how they apply to you and your job.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts and producing tables and charts

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer and using software
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (5)

Provide customer service within the rules

Key words and phrases for this Unit

- ◆ follow organisational procedures
- ◆ recognise limitations
- ◆ refer on
- ◆ follow external regulations
- ◆ follow external legislation
- ◆ work safely
- ◆ respect confidentiality
- ◆ awareness of security

UNIT (5) Provide customer service within the rules

Element 1 (5.1) Follow organisation procedures

Performance Criteria

When you provide customer service within the rules you must consistently:

- 1 follow organisational procedures and instructions in a willing and helpful way
- 2 recognise the limits of what you are allowed to do
- 3 refer to somebody in authority when you need to
- 4 work in a way that protects the security of customers and their property

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UNIT (5)

Provide customer service within the rules

Element 1 (5.1)

Follow organisation procedures

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5) Provide customer service within the rules

Element 2 (5.2) Follow external regulation and legislation

Performance Criteria

When you provide customer service within the rules you must consistently:

- 1 work in a way that is safe for your customers and your colleagues
- 2 respect confidentiality relating to customers and the organisation
- 3 work in a way that shows you are aware of the areas of your job that are covered by law and the things you must not do
- 4 work in a way that shows you are aware of the main regulations that apply to your job and the things you must not do

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UNIT (5)

Provide customer service within the rules

Element 2 (5.2)

Follow external regulation and legislation

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5)

Provide customer service within the rules

Knowledge and Understanding

To be competent at providing customer service within the rules you need to know and understand:

- 5a organisational procedures that relate to your job
- 5b limits of what you are allowed to do
- 5c what might endanger customers or their property
- 5d what health and safety risks and hazards might be faced by your customers
- 5e why it is important to respect customer and organisation confidentiality
- 5f the main regulations that apply to your job
- 5g the main things you must do and not do in your job under laws covering:
 - ◆ equal opportunities
 - ◆ disability discrimination
 - ◆ data protection
 - ◆ health and safety
 - ◆ employment responsibility and rights
 - ◆ consumer protection
- 5h the security arrangements of your organisation and how they apply to your job role

Evidence Requirements

- 1 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 realistic working environment or a work placement is permissible.

Evidence Requirements (cont)

Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

- 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 You must provide evidence of being willing and helpful with customers:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 Your evidence must show that:
 - (a) you have worked within your own limits of authority
 - (b) you have referred to somebody in authority when you have needed to
- 6 Your evidence must also include examples of rules that are based on:
 - (a) legislation
 - (b) sector or industry regulation
 - (c) your organisation's policies

UNIT (5)

Provide customer service within the rules

Evidence Requirements (cont)

- 7 Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, witness testimonies or any other method that makes your assessor confident that you have proved competence.

UNIT (5)

Provide customer service within the rules

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (9) Give customers a positive impression of yourself and your organisation

This Unit has the following elements:

Element 1 (9.1)	Establish effective rapport with customers
Element 2 (9.2)	Respond appropriately to customers
Element 3 (9.3)	Communicate information to customers

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers form of the service they are receiving.

This Unit is all about communicating with customers and giving a positive impression of yourself whenever you deal with a customer. By doing this you will also be giving a positive impression of your organisation and the customer service it provides.

All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, respond to us and give us good information. Every detail of your behaviour when dealing with a customer counts.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer and using software
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (9)

Give customers a positive impression of yourself and your organisation

Key words and phrases for this Unit

- ◆ meet and greet customers
- ◆ communicate with customers
- ◆ adapt behaviour for customers
- ◆ identify customer expectations
- ◆ give information to customers
- ◆ check customer understanding
- ◆ respond appropriately to customers
- ◆ locate information for customers
- ◆ explain problems of delivery to customers

UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 1 (9.1)

Establish effective rapport with customers

Performance Criteria

When you give customers a positive impression of yourself and your organisation you must consistently:

- 1 meet your organisation's standards of appearance and behaviour
- 2 greet your customer respectfully and in a friendly manner
- 3 communicate with your customer in a way that makes them feel valued and respected
- 4 identify and confirm your customer's expectations
- 5 treat your customer courteously and helpfully at all times
- 6 keep your customer informed and reassured
- 7 adapt your behaviour to respond effectively to different customer behaviour

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UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 1 (9.1)

Establish effective rapport with customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 2 (9.2)

Respond appropriately to customers

Performance Criteria

When you give customers a positive impression of yourself and your organisation you must consistently:

- 1 respond promptly to a customer seeking assistance
- 2 select the most appropriate way of communicating with your customer
- 3 check with your customer that you have fully understood their expectations
- 4 respond promptly and positively to your customer's questions and comments
- 5 allow your customer time to consider your response and give further explanation when appropriate

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UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 2 (9.2)

Respond appropriately to customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 3 (9.3)

Communicate information to customers

Performance Criteria

When you give customers a positive impression of yourself and your organisation you must consistently:

- 1 quickly locate information that will help your customer
- 2 give your customer the information they need about the services or products offered by your organisation
- 3 recognise information that your customer might find complicated and check whether they fully understand
- 4 explain clearly to your customers any reasons why their needs or expectations cannot be met

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UNIT (9)

Give customers a positive impression of yourself and your organisation

Element 3 (9.3)

Communicate information to customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (9)

Give customers a positive impression of yourself and your organisation

Knowledge and Understanding

To be competent at doing your job in a customer friendly way you must know and understand:

- 9a your organisation's standards for appearance and behaviour
- 9b your organisation's guidelines on how to recognise what your customer wants and respond appropriately
- 9c your organisation's rules and procedures regarding the methods of communication you use
- 9d how to recognise when a customer is angry or confused
- 9e your organisation's standards for timeliness in responding to customer questions and requests for information

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect 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.

Evidence Requirements (cont)

- 4 You must provide evidence of creating a positive impression with customers:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 You need to prove that you have dealt with customers who:
 - (a) have different needs and expectations
 - (b) appear angry or confused
 - (c) behave unconventionally
- 6 Your evidence must show that you respond to customers using your organisation's procedures and guidelines.
- 7 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.
- 8 You must prove that you communicate with customers effectively by providing evidence that you:
 - (a) use appropriate spoken or written language
 - (b) apply the conventions and rules appropriate to the method of communication you have chosen

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UNIT (9)

Give customers a positive impression of yourself and your organisation

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (10) Promote additional services or products to customers

This Unit has the following elements:

Element 1 (10.1)	Identify additional services or products that are available
Element 1 (10.2)	Inform customers about additional services or products
Element 1 (10.3)	Gain customer commitment to using additional services or products

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services and products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competitive environments to encourage their customers to try new services or products.

This Unit is all about your need to keep pace with new developments and to encourage your customers to take an interest in them.

Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation to give them a greater choice.

Because of this everybody offering services or products needs to play a part in making customers aware of what is available.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts and using number skills
- ◆ Will probably provide dual assessment opportunities for; producing tables and charts

Information Technology

- ◆ Will probably provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (10)

Promote additional services or products to customers

Key words and phrases for this Unit

- ◆ promote additional services
- ◆ promote additional products
- ◆ give information
- ◆ listen
- ◆ close discussion
- ◆ refer customer
- ◆ secure agreement
- ◆ take prompt action
- ◆ identify opportunities

UNIT (10)

Promote additional services or products to customers

Element 1 (10.1)

Identify additional services or products that are available

Performance Criteria

When you promote additional services or products to customers you must consistently:

- 1 update and develop your knowledge of your organisation's services or products
- 2 check with others when you are unsure of a new service or product details
- 3 identify appropriate services or products that may interest your customer
- 4 spot opportunities for offering your customer additional services or products that will improve their customer experience

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UNIT (10)

Promote additional services or products to customers

Element 1 (10.1)

Identify additional services or products that are available

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (10)

Promote additional services or products to customers

Element 2 (10.2)

Inform customers about additional services or products

Performance Criteria

When you promote additional services or products to customers you must consistently:

- 1 choose the most appropriate time to inform your customer about additional services or products
- 2 choose the most appropriate method of communication to introduce your customer to additional services or products
- 3 give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- 4 give your customer time to ask questions about the additional services or products

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UNIT (10)

Promote additional services or products to customers

Element 2 (10.2)

Inform customers about additional services or products

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (10)

Promote additional services or products to customers

Element 3 (10.3)

Gain customer commitment to using additional services or products

Performance Criteria

When you promote additional services or products to customers you must consistently:

- 1 close the discussion appropriately if your customer shows no interest
- 2 give relevant information to move the situation forward when your customer shows interest
- 3 secure customer agreement and check customer understanding of the delivery of the service or product
- 4 take action to ensure prompt delivery of the additional services or products to your customer
- 5 refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility

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UNIT (10)

Promote additional services or products to customers

Element 3 (10.3)

Gain customer commitment to using additional services or products

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (10)

Promote additional services or products to customers

Knowledge and Understanding

To be competent at promoting additional services or products to customers you need to know and understand:

- 10a your organisation's procedures and systems for encouraging the use of additional services or products
- 10b how the use of additional services or products will benefit your customers
- 10c how your customer's use of additional services or products will benefit your organisation
- 10d the main factors that influence customers to use your services or products
- 10e how to introduce services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- 10f how to give appropriate, balanced information to customers about services or products

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.

Evidence Requirements (cont)

- 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 You must provide evidence that the additional services or products offered include:
 - (a) use of services or products that are new to your customer
 - (b) additional use of services or products that your customer has used before
- 5 Your evidence must show that you:
 - (a) follow organisational procedures for offering additional services or products to your customers
 - (b) create opportunities for encouraging your customers to use additional services or products
 - (c) identify what your customer wants by seeking information directly
 - (d) identify what your customer wants from spontaneous customer comments
- 6 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

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UNIT (10)

Promote additional services or products to customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (11) Process customer service information

This Unit has the following elements:

Element 1 (11.1)	Collect customer service information
Element 2 (11.2)	Select and retrieve customer service information
Element 3 (11.3)	Supply customer service information

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

You and your organisation need customer service information to answer customer questions and to respond to customer requests. Information about customers is also used by your organisation to develop its customer service. Some customer service information is collected from your customers. Other customer service information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when appropriate.

Good customer service information provides a sound basis for all customer service transactions. The quality of the customer service information depends heavily on the skills and attention to detail of the person dealing with the information.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ Will probably provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (11)

Process customer service information

Key words and phrases for this Unit

- ◆ collect information
- ◆ record information
- ◆ ensure accuracy of information
- ◆ store information
- ◆ answer questions
- ◆ retrieve information
- ◆ select information
- ◆ supply information

UNIT (11) Process customer service information

Element 1 (11.1) Collect customer service information

Performance Criteria

When you process customer service information you must consistently:

- 1 collect and record new customer service information following your organisation's guidelines
- 2 update existing customer service information
- 3 record and store customer service information that is accurate, sufficient and relevant following organisational guidelines

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UNIT (11)

Process customer service information

Element 1 (11.1)

Collect customer service information

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (11)

Process customer service information

Element 2 (11.2)

Select and retrieve customer service information

Performance Criteria

When you process customer service information you must consistently:

- 1 respond promptly to requests for customer service information
- 2 select and retrieve relevant information for customers or colleagues following your organisation's guideline

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UNIT (11)

Process customer service information

Element 2 (11.2)

Select and retrieve customer service information

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (11)

Process customer service information

Element 3 (11.3)

Supply customer service information

Performance Criteria

When you process customer service information you must consistently:

- 1 supply accurate and sufficient customer service information to meet your customers' or colleagues' expectations
- 2 choose the most appropriate way to supply information to your customers or colleagues
- 3 confirm that your customers or colleagues have received and understood the customer service information

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UNIT (11)

Process customer service information

Element 3 (11.3)

Supply customer service information

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (11)

Process customer service information

Knowledge and Understanding

To be competent at processing customer service information you need to know and understand:

- 11a your organisation's procedures and guidelines for collecting, retrieving and supplying customer service information
- 11b how to collect customer service information efficiently and effectively
- 11c how to operate the customer service information storage system
- 11d why processing customer service information correctly makes an important contribution to effective customer service
- 11e the importance of attention to detail when processing customer service information
- 11f legal and regulatory restrictions on the storage of data

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 Organisations use different methods to store information. Your evidence must be demonstrated by using the method that is most appropriate for your organisation.
- 5 Your evidence must prove that you have processed customer information for a variety of customers with different requirements.
- 6 Your evidence must prove that you have processed customer information relating to:
 - (a) new customers
 - (b) returning customers
- 7 Your evidence must show that you have:
 - (a) checked whether the information you are collecting and retrieving is accurate and up-to-date
 - (b) selected information that is directly relevant to each of your customers
- 8 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

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UNIT (11)

Process customer service information

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (12) Live up to the customer service promise

This Unit has the following elements:

Element 1 (12.1)	Understand and explain the promise
Element 1 (12.2)	Produce customer satisfaction by delivering the promise

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

You may work in an organisation that has a carefully defined brand that implies a specific service offer and promise to your customers. Often, much work has taken place to develop these, and they influence what your customer expects. Through promoting the brand, the organisation is making a promise to the customer about what they can expect. Customer satisfaction is unlikely to be achieved if your customers' experience does not match their expectations of that promise.

This Unit is all about the way your work supports the branding given to your organisation's products and services. It covers what you must do to make sure that you deliver the promise that your customer has come to expect. It also covers how you can avoid giving your customer an experience that is significantly different from the one offered in the promise.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ Will probably provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (12)

Live up to the customer service promise

Key words or phrases for this Unit

- ◆ customer service promise
- ◆ delivering the promise
- ◆ produce customer satisfaction
- ◆ service offer
- ◆ know the brand
- ◆ observing
- ◆ listening
- ◆ meet customer expectations

UNIT (12)

Live up to the customer service promise

Element 1 (12.1)

Understand and explain the promise

Performance Criteria

When you deliver the promise offered by your organisation you must consistently:

- 1 explain the key features of the service offer and promise your organisation has made
- 2 identify the role you can play to ensure that your customer believes that the service offer and promise is being delivered
- 3 explain the procedures and regulations your organisation uses to support the service offer and promise
- 4 devise and use phrases that reinforce the service offer and promise
- 5 identify and avoid phrases that might be used, but would not fit with the service offer and promise
- 6 identify moments and actions within the delivery of customer service that are particularly relevant to your customer's perceptions of the promise being delivered
- 7 share ideas with colleagues about how particular words and approaches help to support the service offer, vision and promise

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UNIT (12)

Live up to the customer service promise

Element 1 (12.1)

Understand and explain the promise

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (12)

Live up to the customer service promise

Element 2 (12.2)

Produce customer satisfaction by delivering the promise

Performance Criteria

When you deliver the promise offered by your organisation you must consistently:

- 1 ensure that your appearance and behaviour supports the organisation's service offer and promise
- 2 observe or listen to your customer closely to identify opportunities to reinforce their understanding of the service offer and promise
- 3 take actions to deliver customer service in a way that meets your customer's expectations and understanding of the service offer and promise
- 4 ensure that what you decide to do is realistic and in line with the service offer and promise
- 5 be positive about and supportive of the service offer and promise regardless of any personal reservations you might have

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UNIT (12)

Live up to the customer service promise

Element 1 (12.2)

Produce customer satisfaction by delivering the promise

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (12)

Live up to the customer service promise

Knowledge and Understanding

To be competent at delivering the promise you need to know and understand:

- 12a the key features, moments of truth (those points in the customer service process that have the most impact on the customer experience) and customer experiences that define the organisation's service offer, vision and promise
- 12b ways in which staff can contribute to communicating the service vision or promise to customers
- 12c sales, marketing and/or public relations reasons for defining a service offer, vision and promise
- 12d how words can be used and adapted to reflect a defined service offer, vision and promise
- 12e how actions can be used and adapted to reflect a defined service offer, vision and promise

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements

- 4 Your organisation's service offer, vision and promise may be expressed formally or may be simply an informal description of the way customer service is delivered.
- 5 Your evidence of your organisation's service offer, vision and promise must include examples of:
 - (a) the way these are communicated to customers
 - (b) how your job role links with your organisation's offers
- 6 You must show how you deliver the customer service promise:
 - (a) through your own efforts
 - (b) working with others
- 7 Your evidence must show that you have taken opportunities to reinforce your organisation's message:
 - (a) through organisation initiatives
 - (b) by responding to opportunities when dealing with customers

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UNIT (12)

Live up to the customer service promise

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (13) Make customer service personal

This Unit has the following elements:

- | | |
|-------------------------|--|
| Element 1 (13.1) | Identify opportunities for making customer service personal |
| Element 2 (13.2) | Treat your customer as an individual |

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction.

This Unit is all about how you can help your customers feel that they have experienced service that focuses on them as an individual. When you work with a customer you need to give the impression that it is on a 'one-to-one' basis, that you care what happens to them and that you respect them as an individual.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts and producing tables and charts

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; using software
- ◆ May provide dual assessment opportunities for; operating the computer
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (13)

Make customer service personal

Key words and phrases for this Unit

- ◆ communicating
- ◆ feeling valued
- ◆ giving respect
- ◆ adding the personal touch
- ◆ working with customers with particular needs
- ◆ balancing time
- ◆ forming 'one-to-one' relationships

UNIT (13)

Make customer service personal

Element 1 (13.1)

Identify opportunities for making customer service personal

Performance Criteria

When you make customer service personal you must consistently:

- 1 identify which of your organisation's systems or procedures allows you to add a personal touch to your service
- 2 use the cues and information that your customer gives to develop the personal service
- 3 let your customer know that you understand and that you are there to help
- 4 identify opportunities to help or direct your customer outside of normal routines and procedures
- 5 identify customers with particular needs who would especially appreciate personal service
- 6 balance the time you take when giving individual attention to one customer with the needs and expectations of other customers
- 7 make extra efforts to show how willing and able you are to give a more personal service

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UNIT (13)

Make customer service personal

Element 1 (13.1)

Identify opportunities for making customer service personal

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (13)

Make customer service personal

Element 2 (13.2)

Treat your customer as an individual

Performance Criteria

When you make customer service personal you must consistently:

- 1 greet and deal with your customer in a way that respects them as an individual
- 2 focus your attention on the customer you are dealing with
- 3 always communicate with your customer in a friendly and open way
- 4 use your customer's name where it is known and appropriate
- 5 follow your organisation's guidelines about giving your customer your own name and contact details
- 6 concentrate on building a 'one-to-one' relationship with your customer by making them feel valued and respected

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UNIT (13)

Make customer service personal

Element 2 (13.2)

Treat your customer as an individual

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (13)

Make customer service personal

Knowledge and Understanding

To be competent at making customer service personal you need to know and understand:

- 13a how use of your customer's name makes service more personal
- 13b personality types and their receptiveness to personalised services
- 13c types of personal information about customers that should and should not be kept on record
- 13d features of personal service that are most appreciated by customers with individual needs
- 13e body language and approaches to communication that are generally interpreted as open
- 13f your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- 13g your own preferences and comfort levels relating to how you are willing and able to personalise service

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 You must provide evidence of making customer service personal:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 Your evidence must include examples of how you have dealt with customers who are:
 - (a) happy with the service they are receiving
 - (b) unhappy about the service they are receiving
- 6 You must provide evidence that you have made customer service more personal:
 - (a) when you have taken the initiative
 - (b) in response to an opportunity presented when your customer has asked a question

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UNIT (13)

Make customer service personal

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (14)

Go the extra mile in customer service

This Unit has the following elements:

Element 1 (14.1)	Distinguish between routine service standards and 'going the extra mile'
Element 2 (14.2)	Check that your 'extra mile' ideas are feasible
Element 3 (14.3)	'Go the extra mile'

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience.

Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you 'go the extra mile' must be within your own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations.

As customers, we all enjoy and remember it when somebody has 'gone the extra mile' to deliver special customer service.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts and producing tables and charts

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; using software
- ◆ May provide dual assessment opportunities for; operating the computer
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (14)

Go the extra mile in customer service

Key words and phrases for this Unit

- ◆ the service offer
- ◆ explaining
- ◆ recognising needs and expectations
- ◆ adding value
- ◆ taking action
- ◆ checking action
- ◆ understanding own authority
- ◆ monitoring feedback
- ◆ passing on feedback

UNIT (14)

Go the extra mile in customer service

Element 1 (14.1)

Distinguish between routine service standards and 'going the extra mile'

Performance Criteria

When you 'go the extra mile' in customer service you must consistently:

- 1 explain the service offer clearly and concisely
- 2 identify your customer's expectations and needs
- 3 match the service offer with your customer's expectations and needs, and identify the key differences
- 4 identify options for other actions that will give added value customer service and might impress your customer
- 5 choose actions that are most appropriate to impress your customer

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UNIT (14)

Go the extra mile in customer service

Element 1 (14.1)

Distinguish between routine service standards and 'going the extra mile'

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (14)

Go the extra mile in customer service

Element 2 (14.2)

Check that your 'extra mile' ideas are feasible

Performance Criteria

When you 'go the extra mile' mile in customer service you must consistently:

- 1 match your ideas for added value customer service against your authority to see them through
- 2 check that your ideas for added value customer service are possible within your organisation's guidelines
- 3 check that your ideas for added value customer service are possible within regulatory boundaries
- 4 check that your ideas for added value customer service will not unreasonably affect the service to your other customers
- 5 explain your ideas for added value service to a senior colleague or other appropriate authority if necessary

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UNIT (14)

Go the extra mile in customer service

Element 2 (14.2)

Check that your 'extra mile' ideas are feasible

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (14)

Go the extra mile in customer service

Element 3 (14.3)

'Go the extra mile'

Performance Criteria

When you 'go the extra mile' in customer service you must consistently:

- 1 take the appropriate action to 'go the extra mile'
- 2 ensure that your customer is aware of the added value of your actions
- 3 monitor the effects of your added value actions to ensure that the service given to your other customers is not affected unreasonably
- 4 note and pass on positive feedback from your customer about your actions
- 5 suggest that an 'extra mile' action becomes routine if you have seen it work several times and it could be accommodated within the service offer

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UNIT (14)**Go the extra mile in customer service****Element 3 (14.3)****'Go the extra mile'**

No	Description of Evidence	Performance Criteria				
		1	2	3	4	5

UNIT (14)

Go the extra mile in customer service

Element 3 (14.3)

'Go the extra mile'

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (14)

Go the extra mile in customer service

Knowledge and Understanding

To be competent at going the extra mile in customer service you need to know and understand:

- 14a your organisation's service offer
- 14b how customers form expectations of the service they will receive
- 14c what types of service action most customers will see as adding value to the customer service they have already had
- 14d your organisation's rules and procedures that determine your authority to 'go the extra mile'
- 14e relevant legislation and regulation that impact on your freedom to 'go the extra mile'
- 14f how your organisation receives customer service feedback on the types of customer experience that has impressed them
- 14g your organisation's procedures for making changes in its service offer

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 You must provide evidence of going the extra mile with customers:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 Your evidence must show that you have:
 - (a) followed organisational procedures to go the extra mile for customers
 - (b) used your own initiative when going the extra mile for customers
- 6 You must show that you have gone the extra mile for customers:
 - (a) by acting within the limits of your own authority
 - (b) by seeking appropriate authority for specific actions
- 7 You must provide examples of when the benefits of going the extra mile enjoyed by customers are:
 - (a) tangible in that they can be measured
 - (b) intangible in that they are represented solely by feelings and perceptions of the customer experience

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UNIT (14)

Go the extra mile in customer service

No	Description of Evidence	Knowledge and Understanding							Evidence Requirements													
		14a	14b	14c	14d	14e	14f	14g	1	2	3	4a	4b	4c	4d	5a	5b	6a	6b	7a	7b	

UNIT (14)

Go the extra mile in customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (15) Deal with customers in writing or using ICT

This Unit has the following elements:

Element 1 (15.1)	Use written or ICT communication effectively
Element 2 (15.2)	Plan and send an effective written or ICT communication
Element 3 (15.3)	Handle incoming written or ICT communications effectively

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or by using ICT. This form of communication carries risks and implications that are less likely to apply to conversation held with your customer face-to-face or on the telephone.

This Unit is all about how written or ICT communication can be made effective and can contribute to excellent customer service.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring
- ◆ May provide dual assessment opportunities for; interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ Will probably provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (15)

Deal with customers in writing or using ICT

Key words and phrases for this Unit

- ◆ operating equipment
- ◆ managing time
- ◆ using clear and concise language
- ◆ recognising style and tone of language
- ◆ anticipate expectations
- ◆ establish a rapport
- ◆ summarising key points
- ◆ identifying and choosing between options
- ◆ summarising outcomes

UNIT (15) Deal with customers in writing or using ICT

Element 1 (15.1) Use written or ICT communication effectively

Performance Criteria

When you are dealing with customers in writing or using ICT you must consistently:

- 1 operate equipment used to communicate in writing or using ICT efficiently and effectively
- 2 ensure that the period of time between exchanges in writing or using ICT represents excellent customer service
- 3 use language that is clear and concise
- 4 adapt your use of language to meet the individual needs of your customer
- 5 ensure that the style and tone of your written or ICT communication follows your organisation's guidelines and matches the service offer

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UNIT (15)

Deal with customers in writing or using ICT

Element 1 (15.1)

Use written or ICT communication effectively

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (15)

Deal with customers in writing or using ICT

Element 2 (15.2)

Plan and send an effective written or ICT communication

Performance Criteria

When you are dealing with customers in writing or using ICT you must consistently:

- 1 anticipate your customer's expectations taking account of any previous exchanges you may have had
- 2 assemble all the information you need to construct the communication
- 3 plan the objective of your communication
- 4 format your communication following your organisation's guidelines
- 5 open the communication positively to establish a rapport with your customer
- 6 ensure that your customer is aware of the purpose of the communication as early as possible
- 7 summarise the key point of the communication and any actions that you or your customer will take as a result

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UNIT (15)

Deal with customers in writing or using ICT

Element 2 (15.2)

Plan and send an effective written or ICT communication

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (15)

Deal with customers in writing or using ICT

Element 3 (15.3)

Handle incoming written or ICT communications effectively

Performance Criteria

When you are dealing with customers in writing or using ICT you must consistently:

- 1 read your customer's communication carefully to identify their precise reason for contacting you
- 2 identify what they are seeking as the outcome of the contact
- 3 identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- 4 choose the option that is most likely to lead to customer satisfaction within the service offer
- 5 summarise the outcome of the communication and any actions that you or your customer will take as a result

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UNIT (15)

Deal with customers in writing or using ICT

Element 3 (15.3)

Handle incoming written or ICT communications effectively

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (15)

Deal with customers in writing or using ICT

Knowledge and Understanding

To be competent at dealing with customers in writing or using ICT you need to know and understand:

- 15a the importance of using clear and concise language
- 15b the additional significance and potential risks involved in committing a communication to permanent record format
- 15c the effects of style and tone on the reader of a written or ICT communication
- 15d the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- 15e your organisation's guidelines and procedures relating to written communication and the use of ICT to communicate
- 15f how to operate equipment used for producing and sending written or ICT communications
- 15g the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- 15h the risks associated with the confidentiality of written or ICT communications

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 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 Your communication with customers may be in writing, by text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
- 5 Your evidence must include examples of dealing with customers who:
 - (a) have routine expectations of your organisation's customer service
 - (b) have experienced difficulties when dealing with your organisation
 - (c) have made a specific request for information
 - (d) need to be informed of circumstances of which they are unaware
- 6 The style and tone of your communication must follow organisational guidelines and you must prove that you have taken account of:
 - (a) your job role and position in your organisation
 - (b) the personal style and preferences of your customer
 - (c) the conventions of the medium of communication you are using

UNIT (15)

Deal with customers in writing or using ICT

Evidence Requirements (cont)

- 7 Your evidence must include examples of:
 - (a) individual communications with customers
 - (b) group or circular communications with customers
 - (c) group or circular communications that have been tailored to individuals or different categories of customer

- 8 You must show that you have communicated with customers when:
 - (a) you have initiated the contact
 - (b) you are responding to a customer

UNIT (15)

Deal with customers in writing or using ICT

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (16) Deal with customers face-to-face

This Unit has the following elements:

- | | |
|-------------------------|---|
| Element 1 (16.1) | Communicate effectively with your customer |
| Element 2 (16.2) | Improve the rapport with your customer through body language |

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

This Unit is all about the skills you need to deal with your customer in person and face-to-face. When you are working with a customer in this way, good feelings about the way you look and behave can improve how your customer feels about the transaction and give them greater satisfaction.

Whilst verbal communication is important, your focus on your customer and the relationship that is formed also depends on the non-verbal communication that takes place between you. You have many opportunities to impress your customer and your behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; producing tables and charts
- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts and using number skills

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; using software
- ◆ May provide dual assessment opportunities for; operating the computer
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (16)

Deal with customers face-to-face

Key words and phrases for this Unit

- ◆ communicating
- ◆ working face-to-face
- ◆ understanding behaviour
- ◆ giving a professional image
- ◆ balancing demands
- ◆ understanding body language
- ◆ building a rapport
- ◆ keeping focused

UNIT (16)

Deal with customers face-to-face

Element 1 (16.1)

Communicate effectively with your customer

Performance Criteria

When you are dealing with customers face-to-face you must consistently:

- 1 plan a conversation with your customer that has structure and clear direction
- 2 hold a conversation with your customer that establishes rapport
- 3 focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation
- 4 explain your services or products and your organisation's service offer to your customer clearly and concisely
- 5 adapt your communication to meet the individual needs of your customer
- 6 anticipate your customer's requests and needs for information
- 7 balance conflicting demands for your attention whilst maintaining rapport with your current customer
- 8 calm down situations when one customer is adversely affecting the customer service enjoyed by other customers

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UNIT (16)

Deal with customers face-to-face

Element 1 (16.1)

Communicate effectively with your customer

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (16)

Deal with customers face-to-face

Element 2 (16.2)

Improve the rapport with your customer through body language

Performance Criteria

When you are dealing with customers face-to-face you must consistently:

- 1 present a professional and respectful image when dealing with your customer
- 2 show an awareness of your customer's needs for personal space
- 3 focus your attention on your customer so that non-verbal cues do not betray disinterest, boredom or irritation
- 4 ensure that your customer focus is not disrupted by colleagues
- 5 observe all customers and the total customer service situation whilst maintaining rapport with your current customer
- 6 observe your customer to read non-verbal clues about their wishes and expectations

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UNIT (16)

Deal with customers face-to-face

Element 2 (16.2)

Improve the rapport with your customer through body language

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (16)

Deal with customers face-to-face

Knowledge and Understanding

To be competent at dealing with customers face-to-face you need to know and understand:

- 16a the importance of speaking clearly and slowly when dealing with a customer face-to-face
- 16b the importance of taking the time to listen carefully to what the customer is saying
- 16c your organisation's procedures that impact on the way you are able to deal with your customers face-to-face
- 16d the features and benefits of your organisation's services or products
- 16e your organisation's service offer and how it affects the way you deal with customers face-to-face
- 16f the principles of body language that enable you to interpret customer feelings without verbal communication
- 16g how individual transactions between people can be understood by using a behavioural model such as transactional analysis
- 16h why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction
- 16i the agreed and recognised sector cues in customer behaviour that indicate that your customer expects a particular action by you

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.

Evidence Requirements (cont)

- 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 Your evidence must include examples of dealing with customers who:
 - (a) have routine expectations of your organisation's customer service
 - (b) have experienced difficulties when dealing with your organisation
 - (c) have made a specific request for information
 - (d) need to be informed of circumstances of which they are unaware
- 5 Your evidence must include examples of dealings with customers that are:
 - (a) planned
 - (b) unplanned
- 6 You must provide evidence of dealing with customers face-to-face:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 7 You must include examples of how you made use of:
 - (a) verbal communication skills
 - (b) non-verbal communication skills

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UNIT (16)

Deal with customers face-to-face

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (17) Deal with customers by telephone

This Unit has the following elements:

Element 1 (17.1)	Use the telephone system effectively
Element 2 (17.2)	Plan and make focussed telephone calls to your customer
Element 3 (17.3)	Handle incoming calls effectively

Unit Summary

This Unit sits within the customer service theme of impression and image. This theme covers the customer service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

This Unit is about the skills and competences you need when dealing with your customer by telephone. Customer satisfaction in this situation depends on good feelings about the way the transaction has been handled as well as the features and benefits of the services or products that are offered to the customer.

Whilst verbal communication is important, your focus on your customer and the rapport that is formed also depends on your skills with the telephone system and any information you are accessing whilst on the telephone to your customer.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring, producing tables and charts and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer and using software
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (17)

Deal with customers by telephone

Key words and phrases for this Unit

- ◆ operating telephone system
- ◆ speaking
- ◆ listening
- ◆ planning
- ◆ selecting information
- ◆ recording information
- ◆ selecting amongst options
- ◆ identifying benefits and drawbacks
- ◆ taking messages

UNIT (17)

Deal with customers by telephone

Element 1 (17.1)

Use the telephone system effectively

Performance Criteria

When you are dealing with customers by telephone you must consistently:

- 1 operate the telephone equipment efficiently and effectively
- 2 keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
- 3 speak clearly and slowly to allow for the possibility that reception on the telephone line may not be perfect
- 4 adapt your speech to meet the individual needs of your customer
- 5 control the length of the conversation if the call is costing your customer money
- 6 ensure that promises to call back are kept

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UNIT (17)

Deal with customers by telephone

Element 1 (17.1)

Use the telephone system effectively

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (17)

Deal with customers by telephone

Element 2 (17.2)

Plan and make focussed telephone calls to your customer

Performance Criteria

When you are dealing with customers by telephone you must consistently:

- 1 anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
- 2 plan the opening part of your conversation with your customer and anticipate their possible responses
- 3 plan the objective of your call and the way in which you expect the call to end
- 4 open the conversation positively and establish a rapport with your customer
- 5 ensure that your customer is aware of the purpose of your call as early as possible
- 6 respond positively to queries and objections from your customer
- 7 summarise the outcome of the call and any actions that you or your customer will take as a result
- 8 listen carefully when collecting information from your customer so that you do not make mistakes or have to keep repeating the question

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UNIT (17)

Deal with customers by telephone

Element 2 (17.2)

Plan and make focussed telephone calls to your customer

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (17)

Deal with customers by telephone

Element 3 (17.3)

Handle incoming calls effectively

Performance Criteria

When you are dealing with customers by telephone you must consistently:

- 1 greet your customer following your organisation's guidelines
- 2 listen closely to your customer to identify their precise reason for calling and what they are seeking as the outcome of the call
- 3 identify all the options you have for responding to your customer, weigh up the benefits and drawbacks of each
- 4 choose the option that is most likely to lead to customer satisfaction within the service offer
- 5 summarise the outcome of the call and any actions that you or your customer will take as a result
- 6 select the appropriate information you need to record and store following your organisation's guidelines
- 7 take a clear message for a colleague if you are unable to deal with some aspect of your customer's expectations
- 8 put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague

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UNIT (17)

Deal with customers by telephone

Element 3 (17.3)

Handle incoming calls effectively

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (17)

Deal with customers by telephone

Knowledge and Understanding

To be competent at dealing with customers by telephone you need to know and understand:

- 17a the importance of speaking clearly and slowly when dealing with customers by telephone
- 17b the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- 17c the importance of adapting your speech to meet the needs of customers who may find your language or accent hard to understand
- 17d your organisation's guidelines and procedures for the use of telephone equipment
- 17e your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- 17f what details should be included if taking a message for a colleague
- 17g how to operate the organisation's telephone equipment
- 17h the importance of keeping your customer informed if they are on hold during a call
- 17i the importance of not talking over an open telephone
- 17j your organisation's guidelines for handling abusive calls

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.

Evidence Requirements (cont)

- 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 Your evidence must include examples of dealing with customers who:
 - (a) have routine expectations of your organisation's customer service
 - (b) have experienced difficulties when dealing with your organisation
 - (c) have made a specific request for information
 - (d) need to be informed of circumstances of which they are unaware
- 5 Your evidence must include examples of dealings with customers that are:
 - (a) planned
 - (b) unplanned
- 6 You must provide evidence of dealing with customers by telephone:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down

UNIT (17)

Deal with customers by telephone

Evidence Requirements (cont)

- 7 You must provide evidence that you have taken messages that are passed on to colleagues:
 - (a) verbally
 - (b) in a form that maintains a permanent record

- 8 You may provide evidence of dealing with customers using conventional land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

UNIT (17)

Deal with customers by telephone

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (21)

Deliver reliable customer service

This Unit has the following elements:

Element 1 (21.1)	Prepare to deal with your customers
Element 2 (21.2)	Give consistent service to customers
Element 3 (21.3)	Check customer service delivery

Unit Summary

This Unit sits within the customer service theme of delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery.

This Unit is all about how you deliver consistent and reliable service to customers.

As well as being good with people, you need to work with your organisation's service systems to meet and, wherever possible, exceed customer expectations.

In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations.

To meet this standard you have to deliver excellent customer service over and over again.

This Unit will provide links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring and using number skills
- ◆ May provide dual assessment opportunities for; interpreting tables and charts and producing tables and charts

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer and using software
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (21)

Deliver reliable customer service

Key words and phrases for this Unit

- ◆ prepare service
- ◆ keep promises
- ◆ inform customers
- ◆ check delivery
- ◆ improve service
- ◆ share information

UNIT (21)

Deliver reliable customer service

Element 1 (21.1)

Prepare to deal with your customers

Performance Criteria

When you deliver reliable customer service you must consistently:

- 1 keep your knowledge of your organisation's services or products up-to-date
- 2 ensure that the area you work in is tidy, safe and organised efficiently
- 3 prepare and arrange everything you need to deal with your customers before your shift or period of work commences

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UNIT (21)

Deliver reliable customer service

Element 1 (21.1)

Prepare to deal with your customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (21)

Deliver reliable customer service

Element 2 (21.2)

Give consistent service to customers

Performance Criteria

When you deliver reliable customer service you must consistently:

- 1 make realistic promises to your customers about the delivery of services or products
- 2 ensure that your promises balance the needs of your customer and your organisation
- 3 keep your promises to your customers
- 4 inform your customers if you cannot keep your promises due to unforeseen circumstances
- 5 recognise when your customer's needs or expectations have changed and adapt your service to meet their new requirements
- 6 keep your customer informed if delivery of the service needs to involve passing them on to another person or organisation

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UNIT (21)

Deliver reliable customer service

Element 2 (21.2)

Give consistent service to customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (21)

Deliver reliable customer service

Element 3 (21.3)

Check customer service delivery

Performance Criteria

When you deliver reliable customer service you must consistently:

- 1 check that the service you have given meets your customer's needs and expectations
- 2 identify when you could have given better service to your customer and how your service could have been improved
- 3 share information with colleagues and service partners to maintain and improve your standards of service delivery

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UNIT (21)

Deliver reliable customer service

Element 3 (21.3)

Check customer service delivery

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (21)

Deliver reliable customer service

Knowledge and Understanding

To be competent at delivering reliable customer service you must know and understand:

- 21a your organisation's procedures and systems for delivering customer service
- 21b methods or systems for measuring an organisation's effectiveness in delivering customer service
- 21c your organisation's procedures and systems for checking service delivery
- 21d your organisation's requirements for health and safety in your area of work

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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 You must prove that you:
 - (a) consistently follow the steps of preparing, delivering and checking customer service
 - (b) have worked with different customers who have different needs and expectations

Evidence Requirements (cont)

- 5 You must provide evidence of delivering reliable customer service:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 6 You must show evidence that you have delivered reliable customer service when working with colleagues.

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UNIT (21)

Deliver reliable customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (22) Deliver customer service on your customer's premises

This Unit has the following elements:

- | | |
|-------------------------|--|
| Element 1 (22.1) | Establish a rapport with your customer |
| Element 2 (22.2) | Balance customer service with your own skills and expertise |

Unit Summary

This Unit sits within the customer service theme of delivery. This theme covers customer service behaviours and processes that have the most effect on the customer experience during customer service delivery.

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property.

This Unit is all about the process of providing a service on customer premises while ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully.

This Unit also applies when you are delivering service to an internal customer in their own work area.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; producing tables and charts
- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts and using number skills

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; using software
- ◆ May provide dual assessment opportunities for; operating the computer and finding information

UNIT (22)

Deliver customer service on your customer's premises

Key words and phrases for this Unit

- ◆ customer's premises
- ◆ language
- ◆ behaviour
- ◆ keep customer informed
- ◆ give explanations
- ◆ consult with customer
- ◆ inform customer
- ◆ work professionally

UNIT (22)

Deliver customer service on your customer's premises

Element 1 (22.1)

Establish a rapport with your customer

Performance Criteria

When you deliver customer service on your customer's premises you must consistently:

- 1 prepare for a visit to your customer's premises and ensure they know when and why you will be there
- 2 identify yourself to your customer showing official identification whenever possible
- 3 show a positive and friendly approach to the service you are about to give
- 4 use appropriate language and behaviour and show your customer respect at all times
- 5 explain to your customer exactly what you are going to do and approximately how long you expect to take
- 6 listen to any concerns that your customer may have and acknowledge them
- 7 keep your customer informed of progress and about any cause for delay that might take place
- 8 keep your customer informed of any variation to the work that could involve additional time or cost
- 9 consult your customer when you will have to do work that they had not expected

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UNIT (22)

Deliver customer service on your customer's premises

Element 1 (22.1)

Establish a rapport with your customer

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (22)

Deliver customer service on your customer's premises

Element 2 (22.2)

Balance customer service with your own skills and expertise

Performance Criteria

When you deliver customer service on your customer's premises you must consistently:

- 1 show respect to your customer's premises and possessions by treating them with care
- 2 consider the customer service implications of each action and, when appropriate, inform your customer of what will be involved
- 3 take the time to give your customer confidence in your knowledge and skills
- 4 inform your customer when you have finished and reinforce how the work has been handled professionally
- 5 check that your customer is satisfied with the work and listen carefully to any feedback
- 6 inform your customer of timescales if any follow-up work is involved
- 7 ensure that timescales for follow-up work are kept
- 8 keep your customer informed if timescales for follow-up work are not going to be met
- 9 explain clearly to your customer why you cannot do work that is not specified in the service offer
- 10 ensure that your customer has the appropriate details to contact your organisation if they need to

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UNIT (22)

Deliver customer service on your customer's premises

Element 2 (22.2)

Balance customer service with your own skills and expertise

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (22)

Deliver customer service on your customer's premises

Knowledge and Understanding

To be competent at delivering customer service on the customer's premises you must know and understand:

- 22a the importance of sensitivity to people's feelings about their own premises and possessions
- 22b the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- 22c the insurance implications of working on your customer's premises
- 22d the organisational procedures you would take if any accidental damage is incurred by you on your customer's premises

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 You must provide evidence that you deliver excellent customer service:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 You must provide evidence that you deliver excellent customer service during:
 - (a) planned visits to your customer's premises
 - (b) visits to your customer's premises made at short notice
- 6 You must provide evidence that you deliver excellent customer service:
 - (a) when your work goes to plan
 - (b) when your work does not go to plan
- 7 You must provide evidence that you deliver excellent customer service:
 - (a) with your customer present
 - (b) when your customer is not present

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UNIT (22)

Deliver customer service on your customer's premises

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (23) Recognise diversity when delivering customer service

This Unit has the following elements:

Element 1 (23.1)	Use reasonable assumptions about your customer whilst avoiding stereotyping
Element 2 (23.2)	Adapt customer service to recognise the different needs and expectations of diverse groups of customers

Unit Summary

This Unit sits within the customer service theme of delivery. This theme covers customer service behaviours and processes that have most effect on the customer experience during customer service delivery.

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from assumptions that are drawn from stereotypes rather than from solid evidence obtained from your customer.

This Unit is all about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The Unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

This Unit will provide the following links to SQA Core Skills at Intermediate 1

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring, interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ Is unlikely to provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (23)

Recognise diversity when delivering customer service

Key words and phrases for this Unit

- ◆ verbal clues
- ◆ non-verbal clues
- ◆ stereotyping
- ◆ impression formation
- ◆ inclusive
- ◆ show respect
- ◆ vary approach
- ◆ work with colleagues

UNIT (23)

Recognise diversity when delivering customer service

Element 1 (23.1)

Use reasonable assumptions about your customer whilst avoiding stereotyping

Performance Criteria

When you recognise diversity while delivering customer service you must consistently:

- 1 observe verbal and non-verbal clues that provide information about your customer's expectations and needs
- 2 identify reasonable assumptions you might make about your customer basing your judgement on your customer's appearance and their communication with you
- 3 test each assumption about your customer against your own beliefs about various categories of people that might include your customer
- 4 check your assumptions by questioning your customer to ensure that the impression you are forming is based on sound evidence from your customer
- 5 adjust your assumptions about your customer's expectations and needs as a result of further clues you have collected through talking with your customer
- 6 identify and avoid features of standard stereotypes that might be applied to your customer that could carry the risk of causing offence

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UNIT (23)

Recognise diversity when delivering customer service

Element 1 (23.1)

Use reasonable assumptions about your customer whilst avoiding stereotyping

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (23)

Recognise diversity when delivering customer service

Element 2 (23.2)

Adapt customer service to recognise the different needs and expectations of diverse groups of customers

Performance Criteria

When you recognise diversity while delivering customer service you must consistently:

- 1 follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- 2 show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
- 3 vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- 4 work with colleagues to identify consistent approaches that team members should adopt when dealing with particular groups

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UNIT (23)

Recognise diversity when delivering customer service

Element 2 (23.2)

Adapt customer service to recognise the different needs and expectations of diverse groups of customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (23)

Recognise diversity when delivering customer service

Knowledge and Understanding

To be competent in recognising diversity when delivering customer service you must know and understand:

- 23a the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- 23b reasons why consideration of diversity and inclusion issues affect customer service
- 23c organisational guidelines to make customer service inclusive for diverse groups of customers
- 23d legal use and meaning of the word 'reasonable'
- 23e how to observe and interpret non-verbal clues
- 23f how to listen actively for clues about your customer's expectations and needs
- 23g techniques for obtaining additional information from customers through tactful and respectful questions
- 23h behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
how to impress specific groups of people to whom you regularly provide customer service

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 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 Your evidence must show that you have developed your approach to diversity taking account of:
 - (a) relevant legislation
 - (b) sector or industry codes of practice
 - (c) the policies and procedures of your own organisation
- 5 You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to at least four of these sources of diversity:
 - (a) age
 - (b) disability
 - (c) national origin
 - (d) sexual orientation
 - (e) values
 - (f) ethnic culture
 - (g) education
 - (h) lifestyle
 - (i) beliefs
 - (j) physical appearance
 - (k) social class
 - (l) economic status

UNIT (23)

Recognise diversity when delivering customer service

Evidence Requirements (cont)

- 6 You must provide examples of situations when your analysis of your assumptions and your customer service delivery have led you to:
 - (a) deliberately adopt different approaches to different groups of customers
 - (b) deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements

UNIT (23)

Recognise diversity when delivering customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6) Recognise and deal with customer queries, requests and problems

This Unit has the following elements:

Element 1 (6.1)	Recognise and deal with customer queries and requests
Element 2 (6.2)	Recognise and deal with customer problems

Unit Summary

This Unit sits within the customer service theme of handling problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

Providing service to customers generally involves routine jobs that you do so it is important to add that ‘personal touch’ that makes each customer feel special. Sometimes customers ask different questions and request special treatment. You may be able to help them yourself and you certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. Your job is to recognise that there is a problem and make sure that the appropriate person deals with it.

This Unit will provide links to the following SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring
- ◆ May provide dual assessment opportunities for; interpreting tables and charts, producing tables and charts and using number skills

Information technology

- ◆ May provide dual assessment opportunities for; using software
- ◆ Will probably provide dual assessment opportunities for; operating the computer and finding information

UNIT (6)

Recognise and deal with customer queries, requests and problems

Key words and phrases for this Unit

- ◆ personal touch
- ◆ recognise problems
- ◆ deal with queries
- ◆ deal with requests
- ◆ obtain help
- ◆ pass on a problem
- ◆ check understanding
- ◆ follow through

UNIT (6)

Recognise and deal with customer queries, requests and problems

Element 1 (6.1)

Recognise and deal with customer queries and requests

Performance Criteria

When you recognise and deal with customer queries, requests and problems you must consistently:

- 1 deal with queries and requests from customers in a positive and professional way
- 2 seek information or help from a colleague if you cannot answer your customer's query or request
- 3 obtain help from a colleague if you are not able to deal with your customer's request
- 4 always tell your customer what is happening

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UNIT (6)

Recognise and deal with customer queries, requests and problems

Element 1 (6.1)

Recognise and deal with customer queries and requests

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6)

Recognise and deal with customer queries, requests and problems

Element 2 (6.2)

Recognise and deal with customer problems

Performance Criteria

When you recognise and deal with customer queries, requests and problems you must consistently:

- 1 recognise when something is a problem from the customer's point of view
- 2 do not say or do anything which may make the problem worse
- 3 deal with a difficult customer calmly and confidently
- 4 recognise when to pass a problem on to an appropriate colleague
- 5 pass the problem on to your colleague with the appropriate information
- 6 check that the customer knows what is happening
- 7 check that your colleague is dealing with the situation

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UNIT (6)

Recognise and deal with customer queries, requests and problems

Element 2 (6.2)

Recognise and deal with customer problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6)

Recognise and deal with customer queries, requests and problems

Knowledge and Understanding

To be competent at recognising and dealing with customer queries, requests and problems you must know and understand:

- 6a who in the organisation is able to give help and information
- 6b limits of what they are allowed to do
- 6c what professional behaviour is
- 6d how to speak to people who are dissatisfied
- 6e how to deal with difficult people
- 6f what customers normally expect
- 6g how to recognise a problem from what a customer says or does
- 6h what kinds of behaviours/actions would make situations worse
- 6i the organisational procedures you must follow when you deal with problems or complaints
- 6j understand the types of behaviour that makes a problem worse

Evidence Requirements

- 1 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 realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.
- 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.

Evidence Requirements (cont)

- 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 Your evidence must include examples of problems which are:
 - (a) brought to your attention by customers
 - (b) identified first by you and/or by your colleagues
- 5 The problems included in your evidence must include examples of:
 - (a) a difference between customer expectations and what is offered by your organisation
 - (b) a problem resulting from a system or procedure failure
 - (c) a problem resulting from a shortage of resources or human error
- 6 You must show that you have considered the options for dealing with problems from the point of view of:
 - (a) your customer
 - (b) the potential benefits to your organisation
 - (c) the potential risks to your organisation
- 7 Your evidence must show that you are aware of when to deal with customer problems:
 - (a) yourself
 - (b) working with close colleagues
 - (c) referring to more senior colleagues with authority to act.

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UNIT (6)

Recognise and deal with customer queries requests and problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (31) Resolve customer service problems

This Unit has the following elements:

Element 1 (31.1)	Spot customer service problems
Element 2 (31.2)	Pick the best solution to resolve customer service problems
Element 3 (31.3)	Take action to resolve customer service problems

Unit Summary

This Unit sits within the customer service theme of handling problems. This theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

This Unit is all about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers will experience problems. Part of your job is to help to resolve those problems. A problem is anything that means customer expectations are not being met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed.

Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed.

As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right.

This Unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring
- ◆ May provide dual assessment opportunities for; interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ May provide dual assessment opportunities for; using software
- ◆ Will probably provide dual assessment opportunities for; operating the computer and finding information

UNIT (31)

Resolve customer service problems

Key words and phrases for this Unit

- ◆ listening
- ◆ recognise repeated problems
- ◆ share feedback
- ◆ choose amongst options
- ◆ work with others
- ◆ resolve problems
- ◆ check progress
- ◆ give explanations

UNIT (31)

Resolve customer service problems

Element 1 (31.1)

Spot customer service problems

Performance Criteria

When you resolve customer service problems you must consistently:

- 1 listen carefully to your customers about problems they have raised
- 2 ask your customers about the problem to check your understanding
- 3 recognise repeated problems and alert the appropriate authority
- 4 share customer feedback with others to identify potential problems before they happen
- 5 identify problems with systems and procedures before they begin to affect your customers

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UNIT (31)

Resolve customer service problems

Element 1 (31.1)

Spot customer service problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (31)

Resolve customer service problems

Element 2 (31.2)

Pick the best solution to resolve customer service problems

Performance Criteria

When you resolve customer service problems you must consistently:

- 1 identify the options for resolving a customer service problem
- 2 work with others to identify and confirm the options to resolve a customer service problem
- 3 work out the advantages and disadvantages of each option for your customer and your organisation
- 4 pick the best option for your customer and your organisation
- 5 identify for your customer other ways that problems may be resolved if you are unable to help

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UNIT (31)

Resolve customer service problems

Element 2 (31.2)

Pick the best solution to resolve customer service problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (31)

Resolve customer service problems

Element 3 (31.3)

Take action to resolve customer service problems

Performance Criteria

When you resolve customer service problems you must consistently:

- 1 discuss and agree the options for solving the problem with your customer
- 2 take action to implement the option agreed with your customer
- 3 work with others and your customer to make sure that any promises related to solving the problem are kept
- 4 keep your customer fully informed about what is happening to resolve problem
- 5 check with your customer to make sure the problem has been resolved to their satisfaction
- 6 give clear reasons to your customer when the problem has not been resolved to their satisfaction

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UNIT (31)

Resolve customer service problems

Element 3 (31.3)

Take action to resolve customer service problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (31)

Resolve customer service problems

Knowledge and Understanding

To be competent in resolving customer service problems you must know and understand:

- 31a organisational procedures and systems for dealing with customer service problems
- 31b how to defuse potentially stressful situations
- 31c how to negotiate
- 31d the limitations of what you can offer your customer

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 Your evidence must include examples of resolving problems involving each of the following:
 - (a) a problem first identified by customers
 - (b) a problem identified within the organisation before it has affected your customer
 - (c) a problem caused by differences between your customer's expectations and what your organisation can offer
 - (d) a problem caused by a system or procedure failure
 - (e) a problem caused by a lack of resources or human error
- 5 Your evidence must prove that you:
 - (a) supplied relevant information when customers have requested it
 - (b) supplied relevant information when customers have not requested it
 - (c) have used agreed organisational procedures when solving problems
 - (d) have made exceptions to usual practice with the agreement of others

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UNIT (31)

Resolve customer service problems

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (36) Develop customer relationships

This Unit has the following elements:

Element 1 (36.1)	Build your customer's confidence that the service you give will be excellent
Element 2 (36.2)	Meet the expectations of your customers
Element 3 (36.3)	Develop the long-term relationship between your customer and your organisation

Unit Summary

This Unit sits within the customer service theme of development and improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

When you deal with your customer regularly, you want to make each encounter a good customer experience. The impression you create and the way the service is delivered affects this in just the same way as when you deal with a customer only once.

However, a longer-term relationship with a repeat customer also depends on building up your customer's confidence in the service you offer. Loyalty and a long-term relationship rely on your customer having a realistic view of your organisation's service and being comfortable with it.

Your customer will return to your organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with you before.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; measuring
- ◆ May provide dual assessment opportunities for; interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer and using software
- ◆ Will probably provide dual assessment opportunities for; finding information

UNIT (36)

Develop customer relationships

Key words and phrases for this Unit

- ◆ retaining customers
- ◆ customer confidence
- ◆ allocate time
- ◆ reassure customers
- ◆ meet expectations
- ◆ balance expectations
- ◆ work with others
- ◆ give additional help
- ◆ long-term relationships
- ◆ advise others
- ◆ gather feedback

UNIT (36)

Develop customer relationships

Element 1 (36.1)

Build your customer's confidence that the service you give will be excellent

Performance Criteria

To develop customer relationships you must consistently:

- 1 show that you know and understand your organisation's services or products
- 2 allocate the time you take to deal with your customer according to organisational guidelines
- 3 reassure your customer that you are doing everything possible to keep the promises made by your organisation

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UNIT (36)

Develop customer relationships

Element 1 (36.1)

Build your customer's confidence that the service you give will be excellent

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (36)

Develop customer relationships

Element 2 (36.2)

Meet the expectations of your customers

Performance Criteria

To develop customer relationships you must consistently:

- 1 recognise when there may be a conflict between your customer's expectations and your organisation's service offer
- 2 balance your customer's expectations with your organisation's service offer by offering an alternative or explaining the limits of the service offer
- 3 work effectively with others to resolve any difficulties in meeting your customer's expectations

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UNIT (36)

Develop customer relationships

Element 2 (36.2)

Meet the expectations of your customers

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (36)

Develop customer relationships

Element 3 (36.3)

Develop the long-term relationship between your customer and your organisation

Performance Criteria

To develop customer relationships you must consistently:

- 1 give additional help and information to your customer in response to their questions and comments about your organisation's services or products
- 2 discuss expectations with your customer and explain how these compare with your organisation's services or products
- 3 advise others of feedback received from your customer
- 4 identify new ways of helping your customers based on the feedback they have given you
- 5 identify extra added-value that your organisation could offer to long-term customers

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UNIT (36)

Develop customer relationships

Element 3 (36.3)

Develop the long-term relationship between your customer and your organisation

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (36)

Develop customer relationships

Knowledge and Understanding

To be competent at developing customer relationships you need to know and understand:

- 36a the importance of customer retention
- 36b how your own behaviour affects the behaviour of the customer
- 36c how to behave assertively and professionally at all times
- 36d how to defuse potentially stressful situations
- 36e the limitations of the service offer
- 36f how customer expectations may change as they deal with your organisation
- 36g the cost and resource implications of an extension of the service offer to meet or exceed customer expectations
- 36h the cost implications of bringing in new customers as opposed to retaining existing customers
- 36i who to refer to when considering any variation to the service offer

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 You must include evidence that shows how you have done this through:
 - (a) your own individual efforts
 - (b) working with others
- 5 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.
- 6 You must provide evidence of taking actions to meet the needs and expectations of your customer and of your organisation:
 - (a) without being asked by your customer
 - (b) at your customer's request
- 7 You must include evidence that you have balanced the needs of your customers and your organisation by:
 - (a) making use of alternative products or services offered by the organisation
 - (b) varying the service you would normally offer within organisational guidelines
 - (c) saying 'no' to your customer and explaining the limits of your organisation's service offer

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UNIT (36)

Develop customer relationships

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (37) Support customer service improvements

This Unit has the following elements:

Element 1 (37.1)	Use feedback to identify potential customer service improvements
Element 2 (37.2)	Implement changes in customer service
Element 3 (37.3)	Assist with the evaluation of changes in customer service

Unit Summary

This Unit sits within the customer service theme of development and improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers.

Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

This Unit is all about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, producing tables and charts and using number skills
- ◆ Will probably provide dual assessment opportunities for; interpreting tables and charts

Information Technology

- ◆ May provide dual assessment opportunities for; using software
- ◆ Will probably provide dual assessment opportunities for; operating the computer and finding information

UNIT (37)

Support customer service improvements

Key words and phrases for this Unit

- ◆ communicate changes positively
- ◆ customer service improvements
- ◆ customer feedback
- ◆ collect information
- ◆ use feedback
- ◆ present possibilities for change
- ◆ improve service
- ◆ share ideas
- ◆ implement changes
- ◆ monitor changes

UNIT (37)

Support customer service improvements

Element 1 (37.1)

Use feedback to identify potential customer service improvements

Performance Criteria

To support customer service improvements you must consistently:

- 1 gather informal feedback from your customers
- 2 use customer feedback procedures to collect information from your customers
- 3 use the information from your customers to develop a better understanding of their customer service experience
- 4 identify ways the service you give could be improved based on information you have gathered
- 5 share your ideas for improving customer service with colleagues

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UNIT (37)**Support customer service improvements****Element 1 (37.1)****Use feedback to identify potential customer service improvements**

Description of Evidence	Performance Criteria				
	1	2	3	4	5

UNIT (37)

Support customer service improvements

Element 1 (37.1)

Use feedback to identify potential customer service improvements

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (37)

Support customer service improvements

Element 2 (37.2)

Implement changes in customer service

Performance Criteria

To support customer service improvements you must consistently:

- 1 identify a possible change that could be made to improve customer service
- 2 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- 3 carry out changes to customer service procedures based on your own idea or proposed by your organisation
- 4 keep your customers informed of changes to customer service
- 5 give customers a positive impression of changes that have been made
- 6 work positively with others to support customer service changes

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UNIT (37)

Support customer service improvements

Element 2 (37.2)

Implement changes in customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (37)

Support customer service improvements

Element 3 (37.3)

Assist with the evaluation of changes in customer service

Performance Criteria

To support customer service improvements you must consistently:

- 1 discuss with others how changes to customer service are working
- 2 work with others to identify any negative effects of changes and how these can be avoided

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UNIT (37)

Support customer service improvements

Element 3 (37.3)

Assist with the evaluation of changes in customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (37)

Support customer service improvements

Knowledge and Understanding

To be competent at supporting customer service improvements you need to know and understand:

- 37a how customer experience is influenced by the way service is delivered
- 37b how customer feedback is obtained
- 37c how to work with others to identify and support change in the way service is delivered
- 37d why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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 You must prove that you have:
 - (a) contributed to improving customer service through your own efforts
 - (b) contributed to improving customer service by working with others

Evidence Requirements (cont)

- 5 Your evidence must cover at least two changes with which you have been actively involved. In each case you must be able to identify the part you played in:
 - (a) linking customer feedback with the reasons for the change
 - (b) implementing the change
 - (c) gathering customer reactions to the change
- 6 Your evidence for each change must show how:
 - (a) the change has improved customer service
 - (b) your customers have reacted to the change
- 7 Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

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UNIT (37)

Support customer service improvements

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (38) Develop personal performance through delivering customer service

This Unit has the following elements:

Element 1 (38.1)	Review performance in your customer service role
Element 2 (38.2)	Prepare a personal development plan and keep it up to date
Element 3 (38.3)	Undertake development activities and obtain feedback on your customer service performance

Unit Summary

This Unit sits within the customer service theme of development and improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

Delivering customer service presents many opportunities for learning and for developing personal skills.

This Unit is all about how you can improve your customer service performance at the same time as developing your personal skills.

You will need to plan together with a manager or mentor and then carry out activities which help you learn and develop in your customer service role.

Customer service improvements rely on continuous improvement and this includes improving your own skills.

This Unit will provide the following links to SQA Core Skills at Intermediate 1:

Numeracy

- ◆ May provide dual assessment opportunities for; measuring, interpreting tables and charts, producing tables and charts and using number skills

Information Technology

- ◆ May provide dual assessment opportunities for; operating the computer, using software and finding information

UNIT (38)

Develop personal performance through delivering customer service

Key words and phrases for this Unit

- ◆ personal performance
- ◆ positive experiences
- ◆ negative experiences
- ◆ self-assessment
- ◆ strengths and weakness
- ◆ identify development objectives
- ◆ personal development plan
- ◆ self-development
- ◆ review development progress
- ◆ carry out development activities
- ◆ obtain personal feedback
- ◆ review and update

UNIT (38)

Develop personal performance through delivering customer service

Element 1 (38.1)

Review performance in your customer service role

Performance Criteria

To develop personal performance through delivering customer service you must consistently:

- 1 work with an appropriate person to establish what you need to know, understand and be able to do to work effectively in your customer service role
- 2 identify and review situations from your own positive and negative experiences as a customer
- 3 carry out a self-assessment of your performance in your customer service role and identify your strengths, weaknesses and development needs

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UNIT (38)

Develop personal performance through delivering customer service

Element 1 (38.1)

Review performance in your customer service role

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (38)

Develop personal performance through delivering customer service

Element 2 (38.2)

Prepare a personal development plan and keep it up to date

Performance Criteria

To develop personal performance through delivering customer service you must consistently:

- 1 agree your strengths, weaknesses and development needs with an appropriate person
- 2 work with an appropriate person to draw up your own development objectives to improve your performance in your customer service role
- 3 develop a customer service personal development plan
- 4 regularly review your progress towards your objectives with an appropriate person

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UNIT (38)

Develop personal performance through delivering customer service

Element 2 (38.2)

Prepare a personal development plan and keep it up to date

Notes/Comments

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Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (38)

Develop personal performance through delivering customer service

Element 3 (38.3)

Undertake development activities and obtain feedback on your customer service performance

Performance Criteria

To develop personal performance through delivering customer service you must consistently:

- 1 complete development activities identified in your customer service personal development plan
- 2 use your day-to-day experiences with your customers and your own experiences as a customer to develop your customer service performance
- 3 obtain feedback from an appropriate person about your customer service performance
- 4 review and update your customer service personal development plan

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UNIT (38)

Develop personal performance through delivering customer service

Element 3 (38.3)

Undertake development activities and obtain feedback on your customer service performance

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (38)

Develop personal performance through delivering customer service

Knowledge and Understanding

To be competent at developing your personal performance through delivering customer service you need to know and understand:

- 38a your organisation's systems and procedures for developing personal performance in customer service
- 38b how your behaviour has an effect on the behaviour of others
- 38c how effective learning depends on a process of planning, doing and reviewing
- 38d how to review effectively your personal strengths and development needs
- 38e how to put together a personal development plan that will build on your strengths and overcome your weaknesses in areas that are important to customer service
- 38f how to access sources of information and support for your learning
- 38g how to obtain useful and constructive personal feedback from others
- 38h how to respond positively to personal feedback

Evidence Requirements

- 1 Your evidence should be collected when carrying out 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 collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 4 An 'appropriate person' must be your manager, your supervisor or team leader, a colleague detailed to help you learn, your assessor, your mentor or someone from your training or personnel department.
- 5 Your evidence must prove that you have:
 - (a) sought feedback from an appropriate person to assess your personal strengths and development needs
 - (b) applied your learning to improve customer service, reviewed the results and used this information to update your personal development plan
- 6 Your evidence must prove that you have developed your personal development plan taking account of:
 - (a) information about the knowledge and skills relevant to your customer service role
 - (b) your own learning style preferences
 - (c) your workload
 - (d) opportunities for learning on the job
- 7 Your personal development plan must be put on record and agreed with an appropriate person.

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UNIT (38)

Develop personal performance through delivering customer service

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

Glossary of terms

Advisor	A person who carries out, either singly or in combination, the functions of advising a candidate, collecting evidence of his or her competence on behalf of the assessor and authenticating the work candidates have undertaken. A mentor might also provide witness testimony.
Assessment	The process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
Assessor	The person designated in a centre to be responsible for collecting evidence of candidates' competence, judging it and recording achievement.
Authentication	The process by which an advisor or assessor confirms that an assessment has been undertaken by a candidate and that all regulations governing the assessment have been observed.
Candidate	The person enrolling for an SQA qualification.
Centre	The college, training organisation or workplace where SQA qualifications are delivered and assessed.
Element of competence	Statements which define the products of learning. The statements describe the activities that the candidate needs to perform in order to achieve the unit. They contain Performance Criteria and sometimes statements on range and evidence. (see outcome)
Evidence	materials the candidate has to provide as proof of his or her competence against specified performance criteria.
Evidence requirements	Specify the evidence that must be gathered to show that the candidate has met the standards laid down in the Performance Criteria.
External verifier	The person appointed by the SQA who is responsible for the quality assurance of a centre's provision. An external verifier is often appointed on a subject area basis or for cognate groups of Units.
Instrument of assessment	A means of generating evidence of the candidate's performance.
Internal verifier	The person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently.
Observation	A means of assessment in which the candidate is observed carrying out tasks that reflect the Performance Criteria given in Outcomes.
Outcome	Statement which defines the products of learning. They describe the activities the candidate has to perform to achieve the Unit, and contain Performance Criteria, and, sometimes, statements on range and evidence (see elements of competence).
Performance Criteria	Statements which describe the standard to which candidates must perform the activities which are stated in the Outcome.

Portfolio	A compilation of evidence which can form the basis for assessment. The portfolio is commonly used in SVQ awards and in alternative routes to assessment such as APL and credit transfer.
Product evaluation	A means of assessment which enables the quality of a product produced by the candidate, rather than the process of producing it, to be evaluated.
Range/Scope	A statement in the Unit which specifies the different contexts in which the activities described in the outcome have to be demonstrated. Where they appear, range/scope statements are mandatory.

Section 4 — Blank recording forms

This section consists of the blank forms referred to in Section 2 for you to photocopy. You may find these useful when compiling your portfolio.

Portfolio title page

Your name: _____

Job title: _____

Name of Employer/
Training Provider/
College: _____

Their address: _____

Tel no: _____

SVQ: _____

Level: _____

Units submitted for assessment:

Mentor: _____

(Please provide details
of Mentor's experience) _____

Assessor: _____

Date: _____

Personal profile

Name

Address

Postcode

Tel no **Home:** **Work:**

Job title

Relevant experience

Description of your current job

Previous work experience

Qualifications and training

Continued overleaf

**Qualifications and Training
(continued)**



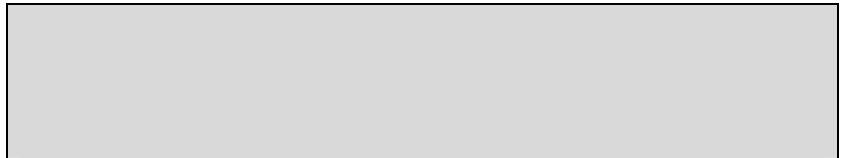
Voluntary work/interests



**Name of Employer/Training
Provider/College**



Address



Postcode



Tel no



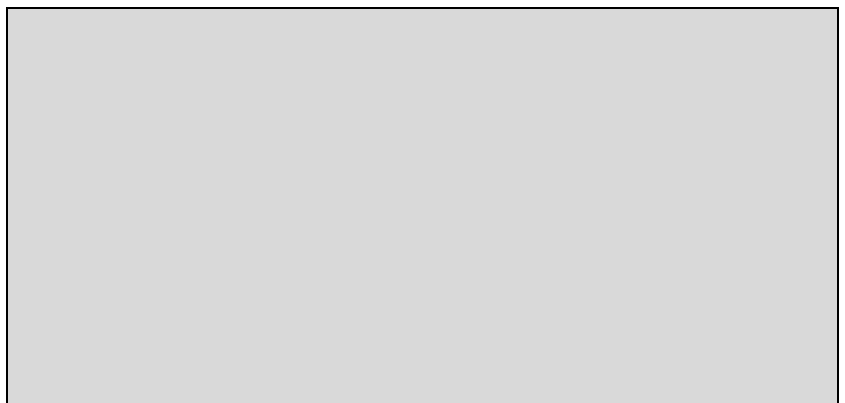
Type of Business



Number of Staff



**Structure of organisation
(include chart or diagram if
available)**



Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

	Completed?	Page/Section number
Title page for the portfolio	<input type="checkbox"/>	
Personal profile		
◆ your own personal details	<input type="checkbox"/>	
◆ a brief CV or career profile	<input type="checkbox"/>	
◆ description of your job	<input type="checkbox"/>	
◆ information about your employer/training provider/college	<input type="checkbox"/>	
Unit Assessment Plans	<input type="checkbox"/>	
Unit progress record	<input type="checkbox"/>	
Completed Element Achievement Records for each unit		
◆ signed by yourself, your assessor and the internal verifier (where relevant)	<input type="checkbox"/>	
◆ Evidence reference numbers included	<input type="checkbox"/>	
Index of evidence (with cross-referencing information completed)	<input type="checkbox"/>	
Evidence (with reference numbers)		
◆ observation records	<input type="checkbox"/>	
◆ details of witnesses (witness testimony sheets)	<input type="checkbox"/>	
◆ personal statements	<input type="checkbox"/>	
◆ products of performance	<input type="checkbox"/>	

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, pcs, and range covered

Candidate signature: _____ Date: _____

Observation record

Unit/Element(s): _____

Candidate: _____ Date of observation: _____

Evidence index number: _____

Skills/activities observed:	PCs and range covered:

Knowledge and understanding apparent from this observation:

Other units/elements to which this evidence may contribute:

Assessor comments and feedback to candidate:

I can confirm the candidate's performance was satisfactory.

Assessor's signature: _____ Date: _____

Candidate's signature: _____ Date: _____

Record of questions and candidate's answers

Unit:	Element(s):
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate's responses: Q: A: Q: A: Q: A: Q: A: Q: A:	
Assessor's signature:	Date:
Candidate's signature	Date:

UNIT:

Element

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

Scottish Qualifications Authority

Portfolio: Customer Service level 2

We hope this portfolio was appropriate to your needs. We welcome feedback on our products and services. If you have any comments on this document, please use this form to let us know about them. Thank you.

Comments

Please return this form to:

Development Co-ordination Unit
Scottish Qualifications Authority
The Optima Building
58 Robertson Street
Glasgow G2 8DQ

Optional information:

Name:

Organisation: