

SVQ in Customer Service level 3

Candidate Guidance and Portfolio

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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 a

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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
The Optima Building
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

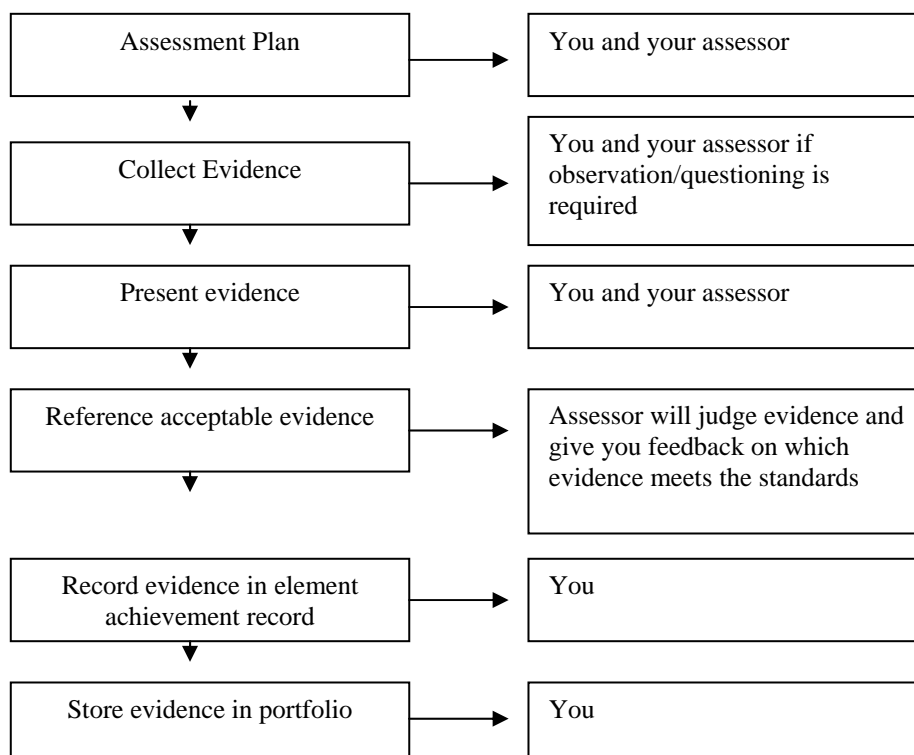
A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

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 3

Candidate: _____

To achieve the whole qualification, you must prove competence in all **two mandatory** Units plus any **six optional** Units. The **six 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	7	8							
Optional	13	14	15	18	19	22	23	24	25
	26	32	33	34	39	40	41	42	43

Mandatory units (*all units should be completed*)

SQA Unit Number	SSB Unit Number	Title	Assessor	Internal Verifier	Date
F05T 04	7	Understand customer service to improve service delivery			
F04E 04	8	Know the rules to follow when developing customer service			
Optional Units: <i>Candidates must achieve six of the following Units, with at least one Unit from each theme:</i>					
Optional Units: Impression and image					
F04K 04	13	Make customer service personal			
F04B 04	14	Go the extra mile in customer service			
F03T 04	15	Deal with customers in writing or using ICT			
F05V 04	18	Use customer service as a competitive tool			
F04R 04	19	Organise the promotion of services or products to customers			

SQA Unit Number	SSB Unit Number	Title	Assessor	Internal Verifier	Date
Optional Units: Delivery					
F03W 04	22	Deliver customer service on your customers' premises			
F05M 04	23	Recognise diversity when delivering customer service			
F03X 04	24	Deliver customer service using service partnerships			
F04N 04	25	Organise the delivery of reliable customer service			
F04D 04	26	Improve customer relationship			
Optional Units: Handling problems					
F04M 04	32	Monitor and solve customer service problems			
F01S 04	33	Apply risk assessment to customer service			
F04W 04	34	Process customer service complaints			
Optional Units: Development and improvement					
F05Y 04	39	Work with others to improve customer service			
F05D 04	40	Promote continuous improvement in customer service			
F044 04	41	Develop your own and others' customer service skills			
F04F 04	42	Lead a team to improve customer service			
F046 04	43	Gather, analyse and interpret customer feedback			

UNIT (7) Understand customer service to improve service delivery

This Unit has the following elements:

- | | |
|------------------------|---|
| Element 1 (7.1) | Use accepted customer service language and apply its principles |
| Element 2 (7.2) | Place customer service principles in context for your professional customer service role |

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.

Industries and organisations have developed a language and approach for customer service that is recognised and understood as the basic principles for service excellence. It is essential for you to understand and apply this language and approach if you are to become a true customer service professional.

This Unit is all about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles defined in this Unit underpin all aspects of making customer service work and enable you to place professional customer practice in the context of your occupational sector and your own organisation.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; using number skills
- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams
- ◆ Will probably provide dual assessment opportunities for; producing tables, charts and diagrams

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 (7)

Understand customer service to improve service delivery

Key words and phrases for this Unit

- ◆ understand customer service language and concepts
- ◆ know customer service principles
- ◆ understand service offer
- ◆ understand service chain
- ◆ know meaning of added value
- ◆ know meaning of competitive advantage
- ◆ understand customer behaviour
- ◆ understand service partnerships

UNIT (7) Understand customer service to improve service delivery

Element 1 (7.1) Use accepted customer service language and apply its principles

Performance Criteria

When you understand customer service to improve service delivery you are able to:

- 1 explain how your organisation builds a service offer that will meet customer expectations
- 2 describe how the service offer is affected by financial and other resource limitations
- 3 describe what effects the service offer may have on the service chain
- 4 give examples of how customers may form their expectations of the services or products
- 5 explain the importance of effective teamwork and service partnerships for the delivery of excellent customer service
- 6 give examples of the similarities and differences in planning customer service offers for the commercial, public sector and private sector not-for-profit organisations
- 7 explain how customer service can provide added value to a public sector or private sector not-for-profit organisation
- 8 explain how customer service can provide a competitive advantage for a commercial organisation
- 9 explain why your organisation must limit the level of customer service it gives in order to balance customer satisfaction with organisational goals
- 10 explain how your behaviour and the behaviour of customers can influence the level of customer satisfaction achieved
- 11 give positive examples of how you deal with different customer behaviours and personalities when managing problems and complaints
- 12 explain the importance of effective communication in the delivery of excellent customer service
- 13 give examples of how you ensure that communication with diverse groups of customers is effective and efficient
- 14 explain the significance of continuous improvement within customer service and the way that change and the management of change are central to ongoing customer satisfaction

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UNIT (7)

Understand customer service to improve service delivery

Element 1 (7.1)

Use accepted customer service language and apply its principles

No	Description of Evidence	Performance Criteria													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14

UNIT (7)

Understand customer service to improve service delivery

Element 1 (7.1)

Use accepted customer service language and apply its principles

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 (7)

Understand customer service to improve service delivery

Element 2 (7.2)

Place customer service principles in context for your professional customer service role

Performance Criteria

When you understand customer service to improve service delivery you are able to:

- 1 give examples of approaches different sectors may take to customer service
- 2 explain your organisation's policies and procedures for the delivery of services or products and why it is important to follow them
- 3 give examples of the service offer of competitors of your organisation or explain how your organisation's service offer is benchmarked if it is not in a competitive environment
- 4 give examples of the essential features and benefits of your organisation's services or products that influence customer service delivery and satisfaction
- 5 describe how your organisation balances its needs with customer expectations and needs
- 6 explain the ethical and values base of your organisation's approach to customer service

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UNIT (7)

Understand customer service to improve service delivery

Element 2 (7.2)

Place customer service principles in context for your professional customer service role

		Performance Criteria					
No	Description of Evidence	1	2	3	4	5	6

UNIT (7)

Understand customer service to improve service delivery

Element 2 (7.2)

Place customer service principles in context for your professional 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 (7)

Understand customer service to improve service delivery

Knowledge and Understanding

The knowledge and understanding relating to this Unit are contained in the customer service standards (Performance Criteria).

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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.

Evidence Requirements (cont)

- 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 at this level.
- 6 Your knowledge of the customer service language and principles must be explained or described from the context of real work.

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UNIT (7)

Understand customer service to improve 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 (8) Know the rules to follow when developing customer service

This Unit has the following elements:

- | | |
|------------------------|---|
| Element 1 (8.1) | Develop customer service following organisational rules and procedures |
| Element 2 (8.2) | Develop customer service following 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.

The job of a customer service professional is to develop and improve customer service. However, this must be done within the framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation.

This Unit is about what needs to be taken into account to ensure that developments and improvements take place within the rules.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; using number skills
- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams
- ◆ Will probably provide dual assessment opportunities for; producing tables, charts and diagrams

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 (8)

Know the rules to follow when developing customer service

Key words and phrases for this Unit

- ◆ advanced knowledge of customer service
- ◆ advanced understanding of customer service
- ◆ understanding of policies and procedures
- ◆ understand how improvements are made
- ◆ know how developments take place
- ◆ know how to negotiate
- ◆ know and understand regulations
- ◆ know and understand legislation
- ◆ know and understand discrimination
- ◆ know and understand health and safety
- ◆ know and understand diversity

UNIT (8)

Know the rules to follow when developing customer service

Element 1 (8.1)

Develop customer service following organisational rules and procedures

Performance Criteria

When you know the rules to follow when developing customer service you are able to:

- 1 describe organisational policies and procedures that you would need to take into account to propose improvements or developments to customer service
- 2 describe how you would obtain authorisation to change customer service practices
- 3 explain the limits of your own authority and who else in the organisation would need to be involved if additional authority is needed for improvements or developments
- 4 explain how you would involve colleagues or service partners in the implementation of improvements or changes

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UNIT (8)

Know the rules to follow when developing customer service

Element 1 (8.1)

Develop customer service following organisational rules and 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 (8)

Know the rules to follow when developing customer service

Element 2 (8.2)

Develop customer service following external regulation and legislation

Performance Criteria

When you know the rules to follow when developing customer service you are able to:

- 1 explain relevant regulation and legislation relating to consumer protection
- 2 describe relevant regulation and legislation relating to data protection
- 3 explain relevant regulation and legislation relating to disability discrimination and equal opportunities
- 4 explain relevant regulation and legislation relating to diversity and inclusion and discrimination for reasons other than disability
- 5 explain relevant regulation and legislation relating to health and safety of customers and colleagues
- 6 explain the need to balance the requirements of regulation with the needs and objectives of your organisation
- 7 describe how you would incorporate relevant regulation and legislation when planning and implementing improvements and developments

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UNIT (8)

Know the rules to follow when developing customer service

Element 2 (8.2)

Develop customer service following 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 (8)

Know the rules to follow when developing customer service

Knowledge and Understanding

The knowledge and understanding relating to this Unit are contained in the customer service standards (Performance Criteria).

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 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 rules and regulations 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.

Evidence Requirements

- 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 rules and regulations which need to be applied when working in the field of customer service at this level.
- 6 Your knowledge of the customer service rules and regulations must be explained or described from the context of real work.
- 7 Your evidence must include examples of rules that are based on:
 - (a) legislation
 - (b) sector or industry regulation
 - (c) your organisation's policies

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UNIT (8)

Know the rules to follow when developing 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 (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 (1.1)

Identify opportunities for making customer service personal

No	Description of Evidence	Performance Criteria						
		1	2	3	4	5	6	7

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'

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

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 (18) Use customer service as a competitive tool

This Unit has the following elements:

Element 1 (18.1) Organise customer service to gain a competitive advantage
Element 2 (18.2) Deliver a competitive service

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.

Customer service contributes to an organisation's competitive position. Customers of many organisations have some choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses.

This Unit is all about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services and products.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

Information Technology

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

UNIT (18)

Use customer service as a competitive tool

Key words and phrases for this Unit

- ◆ analysing the service offer
- ◆ comparing with competitors
- ◆ non-chargeable items
- ◆ adding value
- ◆ understanding financial implications
- ◆ repeat service
- ◆ complementary services
- ◆ customer satisfaction
- ◆ customer loyalty

UNIT (18) Use customer service as a competitive tool

Element 1 (18.1) Organise customer service to gain a competitive advantage

Performance Criteria

When you are using customer service as a competitive tool you must consistently:

- 1 develop your own and colleagues' understanding of the services and products offered by your organisation
- 2 analyse your organisation's service offer and the ways in which it compares with those of your competitors
- 3 set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- 4 encourage customer service actions that create and develop customer loyalty

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UNIT (18)

Use customer service as a competitive tool

Element 1 (18.1)

Organise customer service to gain a competitive advantage

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 (18)

Use customer service as a competitive tool

Element 2 (18.2)

Deliver a competitive service

Performance Criteria

When you are using customer service as a competitive tool you must consistently:

- 1 take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- 2 remind your customers about your service offer and the extra benefit it provides over those of your competitors
- 3 offer additional technical advice to customers within your organisation's service offer
- 4 show awareness of the financial implications of any added value actions that you or your colleagues might offer
- 5 meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- 6 re-direct customers to other service providers without offence when their expectations cannot be met by your organisation's service offer
- 7 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- 8 encourage colleagues to offer complementary services and products when customer satisfaction indicates that your customers would be interested in them

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UNIT (18)

Use customer service as a competitive tool

Element 2 (18.2)

Deliver a competitive 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 (18)

Use customer service as a competitive tool

Knowledge and Understanding

To be competent in using customer service as a competitive tool you need to know and understand:

- 18a the criteria and factors that lead to customers' belief that they are enjoying value for money
- 18b the services and products offered by your organisation
- 18c the services and products offered by competitors
- 18d features and benefits of services and products that are seen by customers as added value
- 18e the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- 18f how to portray a positive image that reinforces your organisation's competitive position
- 18g your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- 18h complementary services and products that may be of interest to your customers

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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.

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 You must provide evidence of using customer service as a competitive tool:
 - (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 examples of when the benefits of using customer service as a competitive tool 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
- 6 Your evidence must include examples of competitive analysis involving:
 - (a) direct competitors
 - (b) competitors offering substitute services or products
- 7 Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
 - (a) loyal customers
 - (b) customers returning from competitors
 - (c) new customers

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UNIT (18)

Use customer service as a competitive tool

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

UNIT (19) Organise the promotion of services or products to customers

This Unit has the following elements:

Element 1 (19.1)	Offer additional services or products
Element 2 (19.2)	Organise support to promote use of additional services or products
Element 3 (19.3)	Monitor the promotion of 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.

This Unit is about expanding and extending the relationship with your customers by persuading them to make use of additional services and products that you can offer.

Your services or products will remain viable only if they are used sufficiently by customers.

This Unit is about how you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring your successes and failures, and recognising the best way to approach your customer with additional services or products for the future.

You need to show that you are promoting the services or products by encouraging more people to use them.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

Information Technology

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

UNIT (19)

Organise the promotion of services or products to customers

Key words and phrases for this Unit

- ◆ additional products
- ◆ additional services
- ◆ promoting
- ◆ planning
- ◆ organising
- ◆ monitoring

UNIT (19)

Organise the promotion of services or products to customers

Element 1 (19.1)

Offer additional services or products

Performance Criteria

When you organise and promote services or products to customers you must consistently:

- 1 offer additional services or products to your customers
- 2 identify the benefits of offering additional services or products for your customers and the organisation
- 3 explain the features and benefits of additional services or products to your customers
- 4 identify ways of encouraging customers to ask about additional services or products

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UNIT (19)

Organise the promotion of services or products to customers

Element 1 (19.1)

Offer 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 (19)

Organise the promotion of services or products to customers

Element 2 (19.2)

Organise support to promote use of additional services or products

Performance Criteria

When you organise and promote services or products to customers you must consistently:

- 1 discuss with others ways of promoting additional services or products to your customers
- 2 implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- 3 promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
- 4 help customers to access services or products which are supplied outside of your own area of the organisation

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UNIT (19)

Organise the promotion of services or products to customers

Element 2 (19.2)

Organise support to promote use of 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 (19)

Organise the promotion of services or products to customers

Element 3 (19.3)

Monitor the promotion of additional services or products

Performance Criteria

When you organise and promote services or products to customers you must consistently:

- 1 devise methods to inform customers about additional services or products
- 2 use different methods to inform customers about additional services and products and record successes and failures against each method
- 3 use your record of successes and failures to identify the best approach for offering additional services or products
- 4 share information with others regarding the best approach to take when offering additional services or products to your customers

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UNIT (19)

Organise the promotion of services or products to customers

Element 3 (19.3)

Monitor the promotion of 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 (19)

Organise the promotion of services or products to customers

Knowledge and Understanding

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

- 19a your organisation's procedures and systems for encouraging the use of additional services or products
- 19b how the use of additional services or products will benefit your customers
- 19c the main factors that influence customers to use your services or products
- 19d how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- 19e how to give appropriate, balanced information to your 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 evidence for this Unit must prove that you:
 - (a) use agreed organisational procedures and systems
 - (b) create your own opportunities
- 5 Your evidence must show that you have:
 - (a) taken responsibility for your own actions in promoting services or products
 - (b) used spontaneous customer feedback to identify opportunities for promoting services or products
 - (c) used customer feedback that you have requested to identify opportunities for promoting services or products
- 6 Your evidence must include examples of:
 - (a) returning customers extending their use of your services or products
 - (b) new customers making use of your services or products

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UNIT (19)

Organise the promotion of 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 (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 (24) Deliver customer service using service partnerships

This Unit has the following elements:

- | | |
|-------------------------|---|
| Element 1 (24.1) | Work effectively within a customer service chain |
| Element 2 (24.2) | Build and nurture positive relationships in a customer service chain |

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.

Excellent customer service relies on teamwork. In many situations, successful delivery of service to external customers relies on a complete service chain of internal customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively.

This Unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and an understanding of the roles of different organisations, departments and individuals are central to this area of work.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; using number skills
- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams
- ◆ Will probably provide dual assessment opportunities for; producing tables, charts and diagrams

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 (24)

Deliver customer service using service partnerships

Key words and phrases for this Unit

- ◆ service partners
- ◆ teamworking
- ◆ internal customers
- ◆ internal suppliers
- ◆ service procedures
- ◆ supply chain
- ◆ service chain
- ◆ positive relationships
- ◆ improving service

UNIT (24) Deliver customer service using service partnerships

Element 1 (24.1) Work effectively within a customer service chain

Performance Criteria

When you deliver customer service using service partnerships you must consistently:

- 1 explain how the way you work with individual service partners represents a supplier/customer relationship
- 2 explain who is involved in the service chain that supplies your end user customers
- 3 identify which of these is internal and external to your organisation
- 4 use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- 5 work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- 6 communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them

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UNIT (24)

Deliver customer service using service partnerships

Element 1 (24.1)

Work effectively within a customer service chain

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 (24)

Deliver customer service using service partnerships

Element 2 (24.2)

Build and nurture positive relationships in a customer service chain

Performance Criteria

When you deliver customer service using service partnerships you must consistently:

- 1 create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
- 2 identify where power and authority exist within the service chain and agree on when and how they should be included
- 3 negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- 4 develop positive relationships with an internal customer or supplier that are reflected in a service level agreement that makes a positive contribution to the relationship
- 5 work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- 6 agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers

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UNIT (24)

Deliver customer service using service partnerships

Element 2 (24.2)

Build and nurture positive relationships in a customer service chain

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 (24)

Deliver customer service using service partnerships

Knowledge and Understanding

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

- 24a the types of responsibilities and rights that can be built into an internal customer/supplier relationship
- 24b the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- 24c how to establish priorities if internal customer demands conflict with external customer demands
- 24d how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- 24e how to negotiate successfully with internal customers or suppliers
- 24f the formal and informal structures of the organisation and how they can influence relationships

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 produce 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 The service level agreement between service partners in your evidence may be formal or informal.
- 5 You must provide examples of working in a service partnership on occasions when:
 - (a) the service partners are cooperative
 - (b) the service partners are un-cooperative
- 6 You must include evidence to show that you have worked in a service partnership with:
 - (a) regular or long term suppliers
 - (b) new suppliers
- 7 Your evidence must show that you have negotiated agreements with service partners that are of benefit to:
 - (a) your organisation
 - (b) your service partner

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UNIT (24)

Deliver customer service using service partnerships

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 (25)

Organise the delivery of reliable customer service

This Unit has the following elements:

Element 1 (25.1)	Plan and organise the delivery of reliable customer service
Element 2 (25.2)	Review and maintain customer service delivery
Element 3 (25.3)	Use recording systems to maintain reliable customer service

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.

This Unit is about how you deliver and maintain excellent customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take responsibility for the resources and systems you use which support the service that you give.

In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Is unlikely to provide dual assessment opportunities for; using number skills
- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams
- ◆ Will probably provide dual assessment opportunities for; producing tables, charts and diagrams

Information Technology

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

UNIT (25)

Organise the delivery of reliable customer service

Key words and phrases for this Unit

- ◆ plan delivery
- ◆ organise delivery
- ◆ maintain delivery
- ◆ customer expectations
- ◆ balance time
- ◆ respond appropriately
- ◆ take action
- ◆ reliability of service
- ◆ record information
- ◆ select information
- ◆ retrieve information
- ◆ supply information

UNIT (25)

Organise the delivery of reliable customer service

Element 1 (25.1)

Plan and organise the delivery of reliable customer service

Performance Criteria

When you organise the delivery of reliable customer service you must consistently:

- 1 plan, prepare and organise everything you need to deliver a variety of services or products to different types of customers
- 2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
- 3 reorganise your work to respond to unexpected additional workloads

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UNIT (25)

Organise the delivery of reliable customer service

Element 1 (25.1)

Plan and organise the delivery of 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 (25)

Organise the delivery of reliable customer service

Element 2 (25.2)

Review and maintain customer service delivery

Performance Criteria

When you organise the delivery of reliable customer service you must consistently:

- 1 maintain service delivery during very busy periods and unusually quiet periods and when systems, people or resources have let you down
- 2 consistently meet your customer's expectations
- 3 balance the time you take with your customers with the demands of other customers seeking your attention
- 4 respond appropriately to your customers when they make comments about the products or services you are offering
- 5 alert others to repeated comments made by your customers
- 6 take action to improve the reliability of your service based on customer comments
- 7 monitor whether the action you have taken has improved the service you give to your customers

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UNIT (25)

Organise the delivery of reliable customer service

Element 2 (25.2)

Review and maintain 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 (25)

Organise the delivery of reliable customer service

Element 3 (25.3)

Use recording systems to maintain reliable customer service

Performance Criteria

When you organise the delivery of reliable customer service you must consistently:

- 1 record and store customer service information accurately following organisational guidelines
- 2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- 3 quickly locate information that will help solve a customer's query
- 4 supply accurate customer service information to others using the most appropriate method of communication

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UNIT (25)

Organise the delivery of reliable customer service

Element 3 (25.3)

Use recording systems to maintain 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 (25)

Organise the delivery of reliable customer service

Knowledge and Understanding

To be competent at organising the delivery of reliable customer service you need to know and understand:

- 25a organisational procedures for unexpected situations and your role within them
- 25b resource implications in times of staff sickness and holiday periods and your responsibility at these times
- 25c the importance of having reliable and fast information for your customers and your organisation
- 25d organisational procedures and systems for delivering customer service
- 25e how to identify useful customer feedback and how to decide which feedback should be acted on
- 25f how to communicate feedback from customers to others
- 25g organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- 25h legal and regulatory requirements regarding 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 need to include evidence that proves you have dealt with a variety of customers including:
 - (a) easy-going customers
 - (b) demanding customers
 - (c) returning customers
 - (d) new customers
- 5 Your evidence must show that you have:
 - (a) taken responsibility for your own actions in the delivery of customer service
 - (b) used spontaneous customer feedback to improve customer service
 - (c) used customer feedback that you have requested to improve customer service
- 6 Your evidence must show that you have organised customer service during:
 - (a) a busy period for you organisation
 - (b) a quiet period for you organisation
- 7 The system you use for recording data can be manual or using ICT systems.

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UNIT (25)

Organise the delivery of 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 (26) Improve the customer relationship

This Unit has the following elements:

Element 1 (26.1)	Improve communication with your customers
Element 2 (26.2)	Balance the needs of your customer and your organisation
Element 3 (26.3)	Exceed customer expectations to develop the relationship

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.

To improve relationships with your customers you will need to deliver consistent and reliable customer service. In addition, customers will need to feel that you genuinely want to give them high levels of service and that you will make every possible effort to meet or exceed their expectations. This will encourage loyalty from external customers or longer-term service partnerships with internal customers.

You need to be proactive in your dealings with your customers and to respond professionally in all situations. You will need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you will need to make extra efforts to delight your customers by giving higher levels of service than they expect.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams
- ◆ Will probably provide dual assessment opportunities for; producing tables, charts and diagrams 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 (26)

Improve the customer relationship

Key words and phrases for this Unit

- ◆ improve communication
- ◆ adapt communication
- ◆ recognise customers' feelings
- ◆ exceed expectations
- ◆ develop relationships
- ◆ balance needs
- ◆ costs and benefits
- ◆ negotiate

UNIT (26)

Improve the customer relationship

Element 1 (26.1)

Improve communication with your customers

Performance Criteria

When you improve the customer relationship you must consistently:

- 1 select and use the best method of communication to meet your customers' expectations
- 2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- 3 adapt your communication to respond to individual customer's feelings

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UNIT (26)

Improve the customer relationship

Element 1 (26.1)

Improve communication 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 (26)

Improve the customer relationship

Element 2 (26.2)

Balance the needs of your customer and your organisation

Performance Criteria

When you improve the customer relationship you must consistently:

- 1 meet your customers' expectations within your organisation's service offer
- 2 explain the reasons to your customers sensitively and positively when their expectations cannot be met
- 3 identify alternative solutions for your customers either within or outside the organisation
- 4 identify the costs and benefits of these solutions to your organisation and to your customers
- 5 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- 6 take action to satisfy your customers with the agreed solution

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UNIT (26)

Improve the customer relationship

Element 2 (26.2)

Balance the needs of 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 (26)

Improve the customer relationship

Element 3 (26.3)

Exceed customer expectations to develop the relationship

Performance Criteria

When you improve the customer relationship you must consistently:

- 1 make extra efforts to improve your relationship with your customers
- 2 recognise opportunities to exceed your customers' expectations
- 3 take action to exceed your customers' expectations within the limits of your own authority
- 4 gain the help and support of others to exceed your customers' expectations

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UNIT (26)

Improve the customer relationship

Element 3 (26.3)

Exceed customer expectations to develop the relationship

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 (26)

Improve the customer relationship

Knowledge and Understanding

To be competent at improving the customer relationship you must know and understand:

- 26a how to make best use of the method of communication chosen for dealing with your customers
- 26b how to negotiate effectively with your customers
- 26c how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- 26d the importance of customer loyalty and/or improved internal customer relationships to your organisation

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 Your evidence must include examples of using:
 - (a) organisational procedures
 - (b) exceptions to standard practice that are legal and benefit your organisation
- 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

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UNIT (26)

Improve the customer relationship

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 (32) Monitor and solve customer service problems

This Unit has the following elements:

Element 1 (32.1)	Solve immediate customer service problems
Element 2 (32.2)	Identify repeated customer service problems and options for solving them
Element 3 (32.3)	Take action to avoid the repetition of 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.

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them.

This Unit is all about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams, producing tables, charts and diagrams 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 (32)

Monitor and solve customer service problems

Key words and phrases for this Unit

- ◆ solve problems
- ◆ work with others
- ◆ keep customers informed
- ◆ repeated problems
- ◆ choose amongst options
- ◆ avoid problems
- ◆ inform
- ◆ monitor changes
- ◆ adjust changes

UNIT (32)

Monitor and solve customer service problems

Element 1 (32.1)

Solve immediate customer service problems

Performance Criteria

When you monitor and solve customer service problems you must consistently:

- 1 respond positively to customer service problems following organisational guidelines
- 2 solve customer service problems when you have sufficient authority
- 3 work with others to solve customer service problems
- 4 keep customers informed of the actions being taken
- 5 check with customers that they are comfortable with the actions being taken
- 6 solve problems with service systems and procedures that might affect customers before they become aware of them
- 7 inform managers and colleagues of the steps taken to solve specific problems

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UNIT (32)

Monitor and solve customer service problems

Element 1 (32.1)

Solve immediate customer service problems

No	Description of Evidence	Performance Criteria						
		1	2	3	4	5	6	7

UNIT (32)

Monitor and solve customer service problems

Element 1 (32.1)

Solve immediate 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 (32)

Monitor and solve customer service problems

Element 2 (32.2)

Identify repeated customer service problems and options for solving them

Performance Criteria

When you monitor and solve customer service problems you must consistently:

- 1 identify repeated customer service problems
- 2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- 3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

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UNIT (32)

Monitor and solve customer service problems

Element 2 (32.2)

Identify repeated customer service problems and options for solving them

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 (32)

Monitor and solve customer service problems

Element 3 (32.3)

Take action to avoid the repetition of customer service problems

Performance Criteria

When you monitor and solve customer service problems you must consistently:

- 1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- 2 action your agreed solution
- 3 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- 4 monitor the changes you have made and adjust them if appropriate

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UNIT (32)

Monitor and solve customer service problems

Element 3 (32.3)

Take action to avoid the repetition of 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 (32)

Monitor and solve customer service problems

Knowledge and Understanding

To be competent at monitoring and solving customer service problems you need to know and understand:

- 32a organisational procedures and systems for dealing with customer service problems
- 32b organisational procedures and systems for identifying repeated customer service problems
- 32c how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- 32d how to negotiate with and reassure customers while their problems are being solved

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 Your evidence must include examples of problems which are:
 - (a) brought to your attention by customers
 - (b) are identified first by you and/or by a colleague

Evidence Requirements (cont)

- 5 The problems included in your evidence must include examples of a:
 - (a) difference between customer expectation and what is offered by your organisation
 - (b) problem resulting from a system or procedure failure
 - (c) problem resulting from a shortage of resources or human error
- 6 You must show that you have considered the options for solving 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 You must provide evidence that you have made use of options that:
 - (a) follow formal organisational procedures or guidelines
 - (b) make agreed and authorised exceptions to usual practice

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UNIT (32)

Monitor and solve 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 (33) Apply risk assessment to customer service

This Unit has the following elements:

Element 1 (33.1)	Analyse customer service processes for risk
Element 2 (33.2)	Assess customer service risks and take appropriate actions

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 how risk assessment can be used to reduce any risks involved in the provision of customer service. The provision of customer service can involve a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables you to take actions to minimise risks.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ May provide dual assessment opportunities for; understanding tables, charts and diagrams, producing tables, charts and diagrams 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 (33)

Apply risk assessment to customer service

Key words and phrases for this Unit

- ◆ risk assessment
- ◆ financial risks
- ◆ reputational risks
- ◆ health and safety risks
- ◆ classifying risks
- ◆ adapt procedures
- ◆ minimise risks

UNIT (33)

Apply risk assessment to customer service

Element 1 (33.1)

Analyse customer service processes for risk

Performance Criteria

When you apply risk assessment to customer service you must consistently:

- 1 identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint
- 2 identify the financial risks for each stage of the customer service process
- 3 identify the reputational risks for each stage of the customer service process
- 4 identify the health and safety risks for each stage of the customer service process
- 5 identify the risk of delivering sub-standard services or products for each stage of the customer service process
- 6 ensure that your customers are aware of any risks that might impact on them
- 7 develop staff awareness of the risks you have identified

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UNIT (33)

Apply risk assessment to customer service

Element 1 (33.1)

Analyse customer service processes for risk

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 (33)

Apply risk assessment to customer service

Element 2 (33.2)

Assess customer service risks and take appropriate actions

Performance Criteria

When you apply risk assessment to customer service you must consistently:

- 1 assess the probability of each risk that you have identified
- 2 assess the consequence of each risk in terms of finance, reputation and health and safety
- 3 classify each risk as high, medium or low taking into account its probability and consequences
- 4 work with colleagues to identify any actions that might be taken to reduce risk
- 5 take appropriate actions to minimise the overall customer service risk profile by adapting procedures

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UNIT (33)

Apply risk assessment to customer service

Element 2 (33.2)

Assess customer service risks and take appropriate actions

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 (33)

Apply risk assessment to customer service

Knowledge and Understanding

To be competent at applying risk assessment to customer service you need to know and understand:

- 33a your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)
- 33b risk assessment techniques
- 33c how to evaluate risk according to probability of occurrence and consequences of occurrence
- 33d the nature of potential customer service risks including financial, reputational and health and safety risks
- 33e cost/benefit analysis
- 33f SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 The procedures you follow for risk assessment may be formal or informal and may or may not be written.
- 5 You must provide evidence that you have identified risks in your own area of responsibility:
 - (a) through your everyday work
 - (b) actively carrying out a risk assessment
 - (c) through discussion with colleagues
- 6 Your evidence must show that when carrying out a risk assessment you have:
 - (a) listed each risk
 - (b) identified the consequences of each risk
 - (c) estimated the probability of each risk occurring
 - (d) made a judgement about any action that is justified taking into account the consequences and probability of each risk
- 7 You must provide evidence that you have worked with at least two of these groups of people to identify possible actions for managing risk:
 - (a) team members or colleagues
 - (b) suppliers or service partners
 - (c) supervisors, team leaders or managers
- 8 Your evidence must show that you have carried out risk assessments that have caused you to:
 - (a) take action to manage the risk
 - (b) decide that the level of risk is tolerable and take no action

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UNIT (33)

Apply risk assessment to 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 (34) Process customer service complaints

This Unit has the following elements:

- | | |
|-------------------------|--|
| Element 1 (34.1) | Recognise the signs that a query or problem is about to produce a complaint |
| Element 2 (34.2) | Deal with a complaint effectively |

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.

In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered.

This Unit is all about the process of handling complaints.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

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 (34)

Process customer service complaints

Key words and phrases for this Unit

- ◆ recognise a complaint
- ◆ dissatisfied customers
- ◆ choose between options
- ◆ assess risks
- ◆ report findings
- ◆ escalate complaints
- ◆ give feedback
- ◆ keep records

UNIT (34)

Process customer service complaints

Element 1 (34.1)

Recognise the signs that a query or problem is about to produce a complaint

Performance Criteria

When you process customer service complaints you must consistently:

- 1 identify signs that a customer is becoming dissatisfied with the customer service of your organisation
- 2 take action to change the situation so that the query or problem does not result in a complaint
- 3 take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made

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UNIT (34)

Process customer service complaints

Element 1 (34.1)

Recognise the signs that a query or problem is about to produce a complaint

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 (34)

Process customer service complaints

Element 2 (34.2)

Deal with a complaint effectively

Performance Criteria

When you process customer service complaints you must consistently:

- 1 ensure that you have a clear understanding of the nature and details of the complaint
- 2 investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- 3 identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
- 4 assess the risks to your organisation of choosing each option
- 5 report the findings of your investigation to your customer and offer your chosen solution
- 6 escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so
- 7 give feedback to other colleagues involved which will help them avoid future complaints
- 8 keep clear records of the way the complaint has been handled to avoid later misunderstandings

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UNIT (34)

Process customer service complaints

Element 2 (34.2)

Deal with a complaint 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 (34)

Process customer service complaints

Knowledge and Understanding

To be competent in processing customer service complaints you need to know and understand:

- 34a how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- 34b why dealing with complaints is an inevitable part of delivering customer service
- 34c organisational procedures for dealing with complaints
- 34d how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- 34e the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- 34f when to escalate a complaint by involving more senior members of the organisation or an independent third party
- 34g the implications of admitting liability for an error made by your organisation
- 34h how to spot and interpret signals that your customer may be considering making a complaint
- 34i techniques for handling conflict
- 34j the importance of dealing with a complaint promptly
- 34k why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- 34l how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 prove that you have processed complaints that are seen by your organisation as:
 - (a) justified
 - (b) unjustified
- 5 You must prove evidence of processing customer service complaints:
 - (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 need to prove that you have dealt with customers who:
 - (a) have different needs and expectations
 - (b) appear angry or confused
 - (c) behave unconventionally
- 7 You must provide evidence that you have processed complaints and taken full account of:
 - (a) organisational procedures
 - (b) sector or industry codes of practice
 - (c) legislation

UNIT (34)

Process customer service complaints

Evidence Requirements (cont)

- 8 Your evidence must include examples of complaints you have processed:
- (a) using your own authority
 - (b) by referring them upwards in the organisation

UNIT (34)

Process customer service complaints

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 (39)

Work with others to improve customer service

This Unit has the following elements:

Element 1 (39.1)

Improve customer service by working with others

Element 2 (39.2)

Monitor your own performance when improving customer service

Element 3 (39.3)

Monitor joint performance when improving 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.

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members, colleagues, suppliers, service partners, supervisors, managers, team leaders.

The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service.

This Unit is all about how you develop a relationship with others to improve your customer service performance.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

Information Technology

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

UNIT (39)

Work with others to improve customer service

Key words and phrases for this Unit

- ◆ work with others
- ◆ improve customer service
- ◆ contribute ideas
- ◆ co-operate with others
- ◆ keep commitments
- ◆ monitor own performance
- ◆ monitor joint performance

UNIT (39)

Work with others to improve customer service

Element 1 (39.1)

Improve customer service by working with others

Performance Criteria

When you work with others to improve customer service you must consistently:

- 1 contribute constructive ideas for improving customer service
- 2 identify what you have to do to improve customer service and confirm this with others
- 3 agree with others what they have to do to improve customer service
- 4 co-operate with others to improve customer service
- 5 keep your commitments made to others
- 6 make others aware of anything that may affect plans to improve customer service

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UNIT (39)

Work with others to improve customer service

Element 1 (39.1)

Improve customer service by working with others

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 (39)

Work with others to improve customer service

Element 2 (39.2)

Monitor your own performance when improving customer service

Performance Criteria

When you work with others to improve customer service you must consistently:

- 1 discuss with others how what you do affects customer service performance
- 2 identify how the way you work with others contributes towards improving customer service

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UNIT (39)

Work with others to improve customer service

Element 2 (39.2)

Monitor your own performance when improving 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 (39)

Work with others to improve customer service

Element 3 (39.3)

Monitor joint performance when improving customer service

Performance Criteria

When you work with others to improve customer service you must consistently:

- 1 discuss with others how teamwork affects customer service performance
- 2 identify with others how customer service teamwork could be improved
- 3 take action with others to improve customer service performance

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UNIT (39)

Work with others to improve customer service

Element 3 (39.3)

Monitor joint performance when improving 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 (39)

Work with others to improve customer service

Knowledge and Understanding

To be competent at working with others to improve customer service you need to know and understand:

- 39a who else is involved either directly or indirectly in the delivery of customer service
- 39b the roles and responsibilities of others in your organisation
- 39c the roles of others outside your organisation who have an impact on your services or products
- 39d what the goals or targets of your organisation are in relation to customer service and how these are set
- 39e how your organisation identifies improvements in 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 Your evidence must include examples of agreeing customer service roles and responsibilities which are:
 - (a) part of your own role
 - (b) part of other people's roles

Evidence Requirements (cont)

- 5 You must provide evidence that you have worked with at least two of these groups of people:
 - (a) team members or colleagues
 - (b) suppliers or service partners
 - (c) supervisors, team leaders or managers
- 6 Your evidence must show that your work with others involves communication by at least two of these methods:
 - (a) face to face
 - (b) in writing
 - (c) by telephone
 - (d) using text messages
 - (e) by e-mail
 - (f) using the internet
 - (g) using an intranet

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UNIT (39)

Work with others to improve 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 (40) Promote continuous improvement in customer service

This Unit has the following elements:

Element 1 (40.1)	Plan improvements in customer service based on customer feedback
Element 2 (40.2)	Implement changes in customer service
Element 3 (40.3)	Review changes to promote continuous improvement

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.

This Unit covers the key competence of the customer service professional.

You must be dedicated to the continuous improvement of customer service and this involves organising changes in customer service over and over again.

You will need to identify potential changes, think through their consequences and make them work.

Above all, this Unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Will probably provide dual assessment opportunities for; understanding tables, charts and diagrams, producing tables, charts and diagrams 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 (40)

Promote continuous improvement in customer service

Key words and phrases for this Unit

- ◆ continuous improvement
- ◆ plan improvements
- ◆ gather feedback
- ◆ interpret feedback
- ◆ work with others
- ◆ identify changes
- ◆ negotiate changes
- ◆ implement changes
- ◆ monitor changes
- ◆ review changes
- ◆ summarise changes
- ◆ analyse changes
- ◆ further improvement

UNIT (40)

Promote continuous improvement in customer service

Element 1 (40.1)

Plan improvements in customer service based on customer feedback

Performance Criteria

When you promote continuous improvement you must consistently:

- 1 gather feedback from customers that will help to identify opportunities for customer service improvement
- 2 analyse and interpret feedback to identify opportunities for customer service improvements and purpose changes
- 3 discuss with others the potential effects of any proposed changes for your customers and your organisation
- 4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

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UNIT (40)

Promote continuous improvement in customer service

Element 1 (40.1)

Plan improvements in customer service based on customer feedback

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 (40)

Promote continuous improvement in customer service

Element 2 (40.2)

Implement changes in customer service

Performance Criteria

When you promote continuous improvement you must consistently:

- 1 organise the implementation of authorised changes
- 2 implement the changes following organisational guidelines
- 3 inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- 4 monitor early reactions to changes and make appropriate fine-tuning adjustments

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UNIT (40)

Promote continuous improvement in customer service

Element 2 (40.2)

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 (40)

Promote continuous improvement in customer service

Element 3 (40.3)

Review changes to promote continuous improvement

Performance Criteria

When you promote continuous improvement you must consistently:

- 1 collect and record feedback on the effects of changes
- 2 analyse and interpret feedback and share your findings on the effects of changes with others
- 3 summarise the advantages and disadvantages of the changes
- 4 use your analysis and interpretation of changes to identify opportunities for further improvement
- 5 present these opportunities to somebody with sufficient authority to make them happen

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UNIT (40)

Promote continuous improvement in customer service

Element 3 (40.3)

Review changes to promote continuous improvement

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 (40)

Promote continuous improvement in customer service

Knowledge and Understanding

To be competent at promoting continuous improvement you need to know and understand:

- 40a how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- 40b how customer experience is influenced by the way service is delivered
- 40c how to collect, analyse and present customer feedback
- 40d how to make a business case to others to bring about change in the products or services you 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 provide evidence that you have organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.

Evidence Requirements (cont)

- 5 You must show that your proposals for improvements:
 - (a) are based on planned and analysed customer feedback
 - (b) take into account all relevant regulations
 - (c) take into account the costs and benefits to the organisation
- 6 You may carry out this work alone or with colleagues. However, you must prove that you have taken an active role in:
 - (a) collecting and analysing feedback
 - (b) proposing initiatives for change
 - (c) implementing the change
 - (d) evaluating and reviewing the change
- 7 Your evidence must clearly show the part you have played in each step of the process.
- 8 The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.

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UNIT (40)

Promote continuous improvement 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 (41) Develop your own and others' customer service skills

This Unit has the following elements:

Element 1 (41.1)	Develop your own customer service skills
Element 2 (41.2)	Plan the coaching of others in customer service
Element 3 (41.3)	Coach others 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.

This Unit is about taking responsibility for continuously developing your own customer service skills and passing those skills on to others. It is about helping yourself and others to learn and grow in your customer service roles.

You may not be a manager or a supervisor but you may be responsible for showing others how things work and what they need to do. For example, a new member of staff may need an introduction to the products, services, systems or procedures of your organisation and you may be asked to show them. Or you may need to coach someone from another department who has been transferred.

Also, there may be the introduction of a new product, service, system or procedure that you are asked to learn about and present or demonstrate to others. This Unit will help you to put 'showing others' into a formal framework that will help them to learn and improve your own coaching skills.

The delivery of excellent customer service depends on your skills and the skills of those around you.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

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 (41)

Develop your own and others' customer service skills

Key words and phrases for this Unit

- ◆ improve personal skills
- ◆ draw up personal development plan
- ◆ carry out personal development activities
- ◆ obtain and act on feedback
- ◆ coach others
- ◆ plan activities for others
- ◆ check progress of colleagues
- ◆ give feedback to colleagues
- ◆ ensure ongoing support for colleagues

UNIT (41) Develop your own and others' customer service skills

Element 1 (41.1) Develop your own customer service skills

Performance Criteria

When you develop your own and others' customer service skills you must consistently:

- 1 agree with a manager or mentor the specific customer service skills you need in your customer service role
- 2 agree the actions you need to take to improve your customer service skills
- 3 draw up a personal development plan based on your agreed actions to improve your customer service skills
- 4 carry out your personal development activities and regularly review your progress
- 5 obtain feedback from your manager or mentor about your customer service performance and update your personal development plan

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UNIT (41)

Develop your own and others' customer service skills

Element 1 (41.1)

Develop your own customer service skills

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 (41)

Develop your own and others' customer service skills

Element 2 (41.2)

Plan the coaching of others in customer service

Performance Criteria

When you develop your own and others' customer service skills you must consistently:

- 1 identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
- 2 identify opportunities for colleagues to take actions to develop their customer service skills
- 3 plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills

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UNIT (41)

Develop your own and others' customer service skills

Element 2 (41.2)

Plan the coaching of others 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 (41)

Develop your own and others' customer service skills

Element 3 (41.3)

Coach others in customer service

Performance Criteria

When you develop your own and others' customer service skills you must consistently:

- 1 coach colleagues to develop specific and agreed customer service skills
- 2 give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- 3 regularly check the progress of colleagues and modify your coaching as appropriate
- 4 give regular feedback to colleagues about the progress they are making
- 5 explain clearly to colleagues how ongoing support will be provided

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UNIT (41)

Develop your own and others' customer service skills

Element 3 (41.3)

Coach others 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 (41)

Develop your own and others' customer service skills

Knowledge and Understanding

To be competent at developing your own and others' customer service skills you need to know and understand:

- 41a organisational systems and procedures for developing your own and others' personal performance in customer service
- 41b how your behaviour impacts on others
- 41c how to review effectively your personal strengths and development needs
- 41d how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
- 41e how to obtain useful and constructive personal feedback from others
- 41f how to respond positively to personal feedback
- 41g how to put together a coaching plan that will build on the strengths of the learner and overcome their weaknesses in areas that are important to customer service and their job role
- 41h how to give useful and constructive personal feedback to others
- 41i how to help others 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 for your assessor to be confident that you are competent.

Evidence Requirements (cont)

- 4 Your personal development plan may be based on existing customer service skills and development activities that already take place in your organisation or new activities that you have to devise for this Unit.
- 5 You must have constructed your personal development plan taking account of information about the knowledge and skills relevant to your:
 - (a) customer service role
 - (b) own preferred method of learning
 - (c) workload
 - (d) opportunities for learning on the job
 - (e) opportunities for learning off the job
- 6 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.
- 7 Feedback about your customer service performance must involve your line manager or supervisor and your evidence must show this.
- 8 Your evidence of coaching may relate to a single colleague or several colleagues who may be new to the organisation, new to the department or new to the job, procedure, or system.

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UNIT (41)

Develop your own and others' customer service skills

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 (42) Lead a team to improve customer service

This Unit has the following elements:

Element 1 (42.1)	Plan and organise the work of a team
Element 2 (42.2)	Provide support for team members
Element 3 (42.3)	Review performance of team members

Unit Summary

This Unit 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.

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance.

This Unit is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

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

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 (42)

Lead a team to improve customer service

Key words and phrases for this Unit

- ◆ plan teamwork
- ◆ organise teamwork
- ◆ lead a team
- ◆ allocate work
- ◆ motivate team members
- ◆ provide support
- ◆ check understanding
- ◆ review team performance
- ◆ provide feedback
- ◆ review individual performance

UNIT (42) Lead a team to improve customer service

Element 1 (42.1) Plan and organise the work of a team

Performance Criteria

When you lead a team to improve customer service you must consistently:

- 1 treat team members with respect at all times
- 2 agree with team members their role in delivering effective customer service
- 3 involve team members in planning and organising their customer service work
- 4 allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- 5 motivate team members to work together to raise their customer service performance

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UNIT (42)

Lead a team to improve customer service

Element 1 (42.1)

Plan and organise the work of a team

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 (42)

Lead a team to improve customer service

Element 2 (42.2)

Provide support for team members

Performance Criteria

When you lead a team to improve customer service you must consistently:

- 1 give team members support and direction when they need help
- 2 encourage team members to work together to improve customer service
- 3 check that team members understand what they have to do to improve their work with customers and why that is important
- 4 check with team members what support they feel they may need throughout this process

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UNIT (42)

Lead a team to improve customer service

Element 2 (42.2)

Provide support for team members

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 (42)

Lead a team to improve customer service

Element 3 (42.3)

Review performance of team members

Performance Criteria

When you lead a team to improve customer service you must consistently:

- 1 provide sensitive feedback to team members about their customer service performance
- 2 encourage team members to discuss their customer service performance
- 3 discuss sensitively with team members action they need to take to continue to improve their customer service performance

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UNIT (42)

Lead a team to improve customer service

Element 3 (42.3)

Review performance of team members

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 (42)

Lead a team to improve customer service

Knowledge and Understanding

To be competent at leading a team to improve customer service you need to know and understand:

- 42a the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- 42b how team and individual performance can affect the achievement of organisational objectives
- 42c the implications of failure to improve customer service for your team members and your organisation
- 42d how to plan work activities
- 42e how to present plans to others to gain understanding and commitment
- 42f how to facilitate meetings to encourage frank and open discussion
- 42g how to involve and motivate staff to encourage teamwork
- 42h how to recognise and deal sensitively with issues of underperformance

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 for your assessor to be confident that you are competent.
- 4 You must prove you have line management or supervisory responsibility for the team members used in your evidence.

Evidence Requirements (cont)

- 5 You must show that you have taken into account the organisational constraints of:
 - (a) cost
 - (b) time
 - (c) human resources
 - (d) other resources
- 6 You must also show that you have taken into account the team or individual constraints of:
 - (a) existing workloads
 - (b) individual capabilities and sensitivities
 - (c) initiatives and objectives currently being undertaken by the organisation
 - (d) influences operating on the team from outside
- 7 Your evidence must prove that you have taken time with each team member to:
 - (a) plan and organise their work
 - (b) provide support and guidance
 - (c) give and seek feedback on performance

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UNIT (42)

Lead a team to improve 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 (43)

Gather, analyse and interpret customer feedback

This Unit has the following elements:

Element 1 (43.1)	Plan to gather customer feedback
Element 2 (43.2)	Gather customer feedback
Element 3 (43.3)	Analyse and interpret customer feedback

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.

Customer service can be improved only if you are fully aware of customer wishes and expectations. You can discover much of this information by seeking structured feedback from your customers about their experiences of your existing services or products.

When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements.

This Unit is all about how you collect that feedback and prepare it for use in the improvement of customer service.

This Unit will provide the following links to SQA Core Skills at Intermediate 2:

Numeracy

- ◆ Will probably provide dual assessment opportunities for; understanding tables, charts and diagrams, producing tables, charts and diagrams 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 (43)

Gather, analyse and interpret customer feedback

Key words and phrases for this Unit

- ◆ gather feedback
- ◆ evaluate costs and benefits
- ◆ select amongst feedback methods
- ◆ gather customer feedback
- ◆ record data
- ◆ analyse data
- ◆ interpret data
- ◆ make recommendations

UNIT (43)

Gather, analyse and interpret customer feedback

Element 1 (43.1)

Plan to gather customer feedback

Performance Criteria

When you gather customer feedback you must consistently:

- 1 identify the options available for collecting customer service feedback
- 2 evaluate the costs and benefits of each option for collecting customer feedback
- 3 select one or more methods for collecting customer feedback
- 4 plan in detail what information you will collect from customers
- 5 ensure the information you collect is centred around customer service
- 6 plan in detail how you will collect information from customers using your chosen method

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UNIT (43)

Gather, analyse and interpret customer feedback

Element 1 (43.1)

Plan to gather customer feedback

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 (43)

Gather, analyse and interpret customer feedback

Element 2 (43.2)

Gather customer feedback

Performance Criteria

When you gather customer feedback you must consistently:

- 1 use your chosen method and detailed plan to collect customer feedback
- 2 monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
- 3 monitor the collection of customer feedback to ensure it focuses on customer service issues
- 4 record the data you collect in a way that makes analysis and interpretation easy
- 5 respect your customers' rights to confidentiality if they do not want their comments to be identified

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UNIT (43)

Gather, analyse and interpret customer feedback

Element 2 (43.2)

Gather customer feedback

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 (43)

Gather, analyse and interpret customer feedback

Element 3 (43.3)

Analyse and interpret customer feedback

Performance Criteria

When you gather customer feedback you must consistently:

- 1 collate data collected from customers in order to identify patterns and trends in customer service
- 2 perform appropriate calculations to summarise patterns and trends in the data
- 3 present your analysis in a form that is easily understood
- 4 link your analysis with your knowledge of your organisation's service offer and customer service processes in order to interpret the meaning of the data
- 5 make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
- 6 identify ways in which customer feedback can be used to inform customers and develop the customer relationship

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UNIT (43)

Gather, analyse and interpret customer feedback

Element 3 (43.3)

Analyse and interpret customer feedback

No	Description of Evidence	Performance Criteria					
		1	2	3	4	5	6

UNIT (43)

Gather, analyse and interpret customer feedback

Element 3 (43.3)

Analyse and interpret customer feedback

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 (43)

Gather, analyse and interpret customer feedback

Knowledge and Understanding

To be competent at gathering, analysing and interpreting customer feedback you need to know and understand:

- 43a random sampling techniques and how to evaluate bias in non-random samples
- 43b principles of questionnaire design
- 43c principles of effective interviewing
- 43d how to calculate the cost of a customer survey
- 43e techniques for monitoring data collection
- 43f how to use appropriate software to record and analyse customer feedback
- 43g methods of displaying and presenting data in a way that is easy to understand
- 43h statistical techniques for summarising trends and patterns
- 43i organisational procedures for recommending changes in the service offer or customer service procedures
- 43j the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or email

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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. 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 collected feedback from customers:
 - (a) using informal methods such as conversation and observation of customer reactions
 - (b) using at least two different formal methods such as questionnaire, telephone or interview surveys
- 5 Your evidence must include examples of feedback that you have collected:
 - (a) using a method you have devised
 - (b) following established organisational procedures
- 6 You must provide evidence that you have displayed the results of your data collection:
 - (a) in tabulated form
 - (b) in geographical or pictorial form

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UNIT (43)

Gather, analyse and interpret customer feedback

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



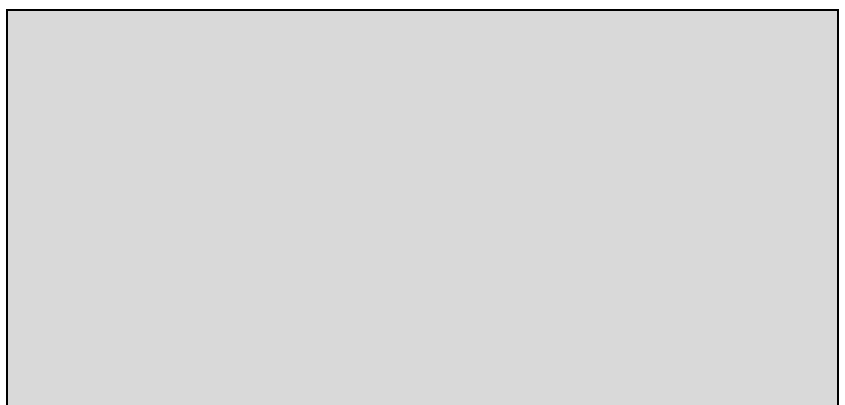
Type of Business



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 3

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: