

SVQ in Customer Service level 1 (G8NM 21)

Candidate Guidance and Portfolio

Candidate name:

Publication code: Z0226

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

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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 Bodies (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

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

You must ensure that you:

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

Range

This means you need to cover:

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

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

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

Evidence Requirements

The things you must prove that you can do:

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

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

Knowledge and Understanding

You must prove that you know and understand:

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

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

How are SVQs achieved?

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

Scottish Qualifications Authority
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58 Robertson Street
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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 Bodies (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

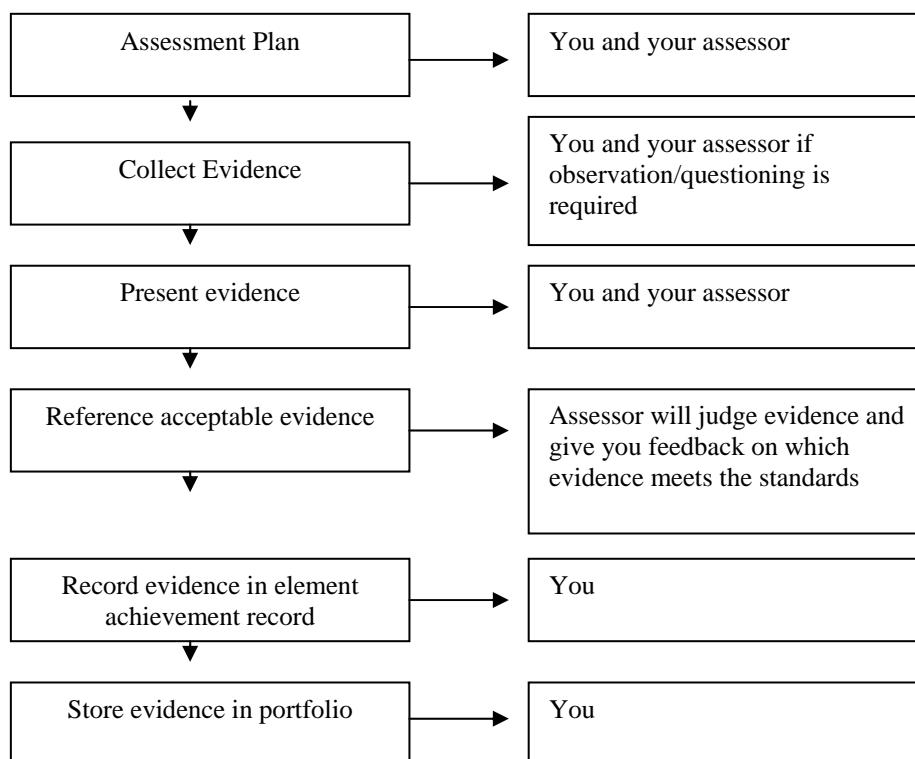
A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

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:	<p>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.</p> <p>I can confirm the candidate's evidence is authentic and accurate.</p>	
Witness signature:	<i>Ian Cummings</i>	
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 1

Candidate: _____

To achieve the whole qualification, you must prove competence in all **five mandatory** Units plus **one optional** Unit.

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

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

Mandatory	1	3	4	5	6
Optional	2a	2b			

Mandatory Units (*all Units should be completed*)

SQA Unit Number	SSB Unit Number	Title	Assessor	Internal Verifier	Date
F04T 04	1	Prepare Yourself to Deliver Good Customer Service			
F27K 04	3	Communicate Effectively with Customers			
F27L 04	4	Do Your Job in a Customer Friendly Way			
F05E 04	5	Provide Customer Service within the Rules			
F05G 04	6	Recognise and Deal with Customer Queries, Requests and Problems			

Optional Units:

Candidates must achieve one of the following Units:

F27M 04	2a	Maintain a Positive and Customer Friendly Attitude			
F27N 04	2b	Adapt Your Behaviour to Make a Good Customer Service Impression			

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UNIT (1) Prepare Yourself to Deliver Good Customer Service

This Unit has the following elements:

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

Unit Summary

This Unit sits within the customer service theme of customer service foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you have to work.

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

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

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

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

Numeracy

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

Information Technology

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

Working with Others

- ◆ May provide dual evidence opportunities for; planning, acting in a group and checking and evaluation

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Problem Solving

- ◆ May provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

Communication

- ◆ May provide dual evidence opportunities for; writing
- ◆ Will probably provide dual evidence opportunities for; reading and understanding and speaking

Key words and phrases for this Unit

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

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Element 1 (1.1)

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

Performance Criteria

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

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

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UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Element 1 (1.1)

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

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

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Element 1 (1.1)

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

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Element 2 (1.2)

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

Performance Criteria

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

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

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UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Element 2 (1.2)

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

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Knowledge and Understanding

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

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

Evidence Requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

Evidence Requirements (cont)

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

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UNIT (1)

Prepare Yourself to Deliver Good Customer Service

No	Description of Evidence	Knowledge and Understanding														Evidence Requirements							
		1a	1b	1c	1d	1e	1f	1g	1h	1i	1j	1k	1l	1m	1n	1o	1	2	3	4	5	6	

UNIT (1)

Prepare Yourself to Deliver Good Customer Service

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (2a) Maintain a Positive and Customer Friendly Attitude

This Unit has the following elements:

- | | |
|-------------------------|--|
| Element 1 (2a.1) | Show the right attitude for customer service |
| Element 2 (2a.2) | Show appropriate and positive behaviours to customers |

Unit Summary

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

Your attitude and the way you behave towards customer's affects customer satisfaction. Simply following procedures is not enough to provide good customer service. Customers like to deal with organisations whose staff show that they are willing and keen. They like to think that you and your colleagues want to help and you can show this by being friendly and positive and giving them your complete personal attention.

Throughout this Unit 'your organisation' means the organisation you work for or the organisation in which you have realistic work experience. Your organisation may refer to the whole of the organisation or for the business unit, division or department with which you are involved.

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

Problem Solving

- ◆ May provide dual evidence opportunities for: investigating, planning and solving, and checking and evaluating

Communication

- ◆ Is unlikely to provide dual evidence opportunities for; writing
- ◆ May provide dual evidence opportunities for; reading and understanding
- ◆ Will probably provide dual evidence opportunities for; speaking

Numeracy

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

UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Information Technology

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

Working with Others

- ◆ May provide dual evidence opportunities for; planning and checking and evaluation
- ◆ Will probably provide dual evidence opportunities for; acting in a group

Key words and phrases for this Unit

- ◆ internal and external customers
- ◆ speaking to customers
- ◆ establishing a rapport
- ◆ treating customers as individuals
- ◆ showing respect
- ◆ being reliable
- ◆ being polite and positive
- ◆ reacting appropriately
- ◆ helping colleagues
- ◆ understanding distraction and interruption

UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Element 1 (2a.1)

Show the right attitude for customer service

Performance Criteria

When you maintain a positive and customer-friendly attitude you must consistently:

- 1 speak to customers clearly and put them at their ease
- 2 recognise how customers are feeling and establish a rapport with them
- 3 show customers that you are willing and enthusiastic at all times
- 4 recognise that each customer is different and treat them as an individual
- 5 show customers respect at all times and under any circumstances
- 6 show customers that you can be relied on
- 7 show colleagues respect at all times and under any circumstances
- 8 show colleagues that you can be relied on

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UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Element 1 (2a.1)

Show the right attitude for customer service

		Performance Criteria							
No	Description of Evidence	1	2	3	4	5	6	7	8

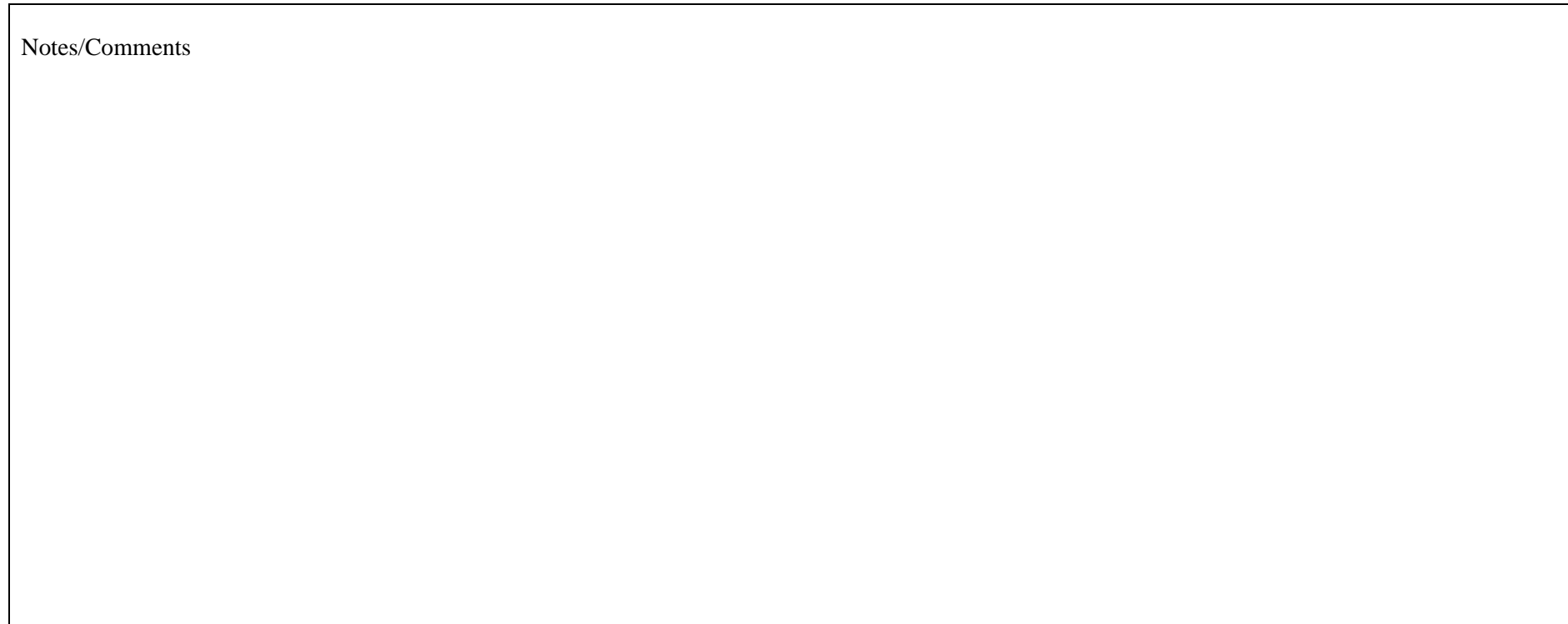
UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Element 1 (2a.1)

Show the right attitude for 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 (2a)

Maintain a Positive and Customer Friendly Attitude

Element 2 (2a.2)

Show appropriate and positive behaviours to customers

Performance Criteria

When you maintain a positive and customer-friendly attitude you must consistently:

- 1 recognise and respond when a customer wants or needs attention
- 2 greet customers politely and positively
- 3 focus on your customers and ignore distractions which are not important to them
- 4 react appropriately to situations that are important enough to interrupt your work with your customer
- 5 thank customers for the information they have given or for doing business with your organisation
- 6 help colleagues to provide good customer service

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UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Element 2 (2a.2)

Show appropriate and positive behaviours to customers

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

UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

Element 2 (2a.2)

Show appropriate and positive behaviours 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 (2a)

Maintain a Positive and Customer Friendly Attitude

Knowledge and Understanding

To be competent at maintaining a positive and customer-friendly attitude you must know and understand:

- 2aa the difference between internal and external customers
- 2ab signs that a customer gives when seeking attention
- 2ac what rapport looks, sounds and feels like
- 2ad what unimportant distractions are
- 2ae what is important enough to interrupt your work with a customer
- 2af positive and negative body language and facial expressions
- 2ag people are different and have different expectations for many reasons such as their age, culture and personality

Evidence Requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on realistic working environment or a work placement is permissible. Simulation is 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 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 are positive and customer friendly with customers who are:
 - (a) easy going
 - (b) difficult
- 5 You need to include evidence that proves you are positive and customer friendly:
 - (a) during routine delivery of customer service
 - (b) during a busy time in your job
 - (c) during a quiet time in your job
- 6 You must include evidence that you have delivered customer service working with:
 - (a) colleagues at the same level
 - (b) more senior colleagues
- 7 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

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UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

No	Description of Evidence	Knowledge and Understanding							Evidence Requirements										
		2aa	2ab	2ac	2ad	2ae	2af	2ag	1	2	3	4a	4b	5a	5b	5c	6a	6b	7

UNIT (2a)

Maintain a Positive and Customer Friendly Attitude

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 (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

This Unit has the following elements:

Element 1 (2b.1)

Look and act the part

Element 2 (2b.2)

Relate to your customers and to colleagues effectively

Unit Summary

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

This Unit is all about how your behaviour affects the way your customers see you. Some of your customers expect different things from the service you offer but there are basic acceptable standards of behaviour and attitudes that you need to achieve. Your managers and supervisors also expect you to meet those standards. When you create the right impression and show a positive attitude you reduce the risk of somebody being upset or offended by the way you deal with them.

You may have done jobs where you have had limited contact with customers, be experiencing customer service work for the first time or just starting your first job.

If you have already successfully done full or part-time work dealing directly with customers, this may not be the right Unit for you and you should consider the Unit — ‘Maintain a positive and customer-friendly attitude’.

Throughout this Unit ‘your organisation’ means the organisation you work for, the organisation in which you have realistic work experiences or the real organisation you have chosen to use as an example to provide your evidence. ‘Your organisation’ may refer to the whole of the organisation or the business unit, division or department with which you are involved.

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

Problem Solving

- ◆ May provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

UNIT (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Communicating

- ◆ Is unlikely to provide dual evidence opportunities for; writing
- ◆ May provide dual evidence opportunities for; reading and understanding
- ◆ Will probably provide dual evidence opportunities for; speaking

Numeracy

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

Information Technology

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

Working with Others

- ◆ May provide dual evidence opportunities for; planning and checking and evaluation
- ◆ Will probably provide dual evidence opportunities for; acting in a group

Key words and phrases for this Unit

- ◆ dress and behaviour
- ◆ attitudes
- ◆ impression formation
- ◆ manners
- ◆ language
- ◆ willingness
- ◆ inappropriate behaviour
- ◆ co-operating
- ◆ good timekeeping

UNIT (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Element 1 (2b.1)

Look and act the part

Performance Criteria

When you adapt your behaviour to give a good customer service impression you must consistently:

- 1 dress appropriately for customer service work in the way your organisation expects
- 2 show how you are working hard and making efforts to impress customers
- 3 be in the right place at the right time to give a good impression and deliver good customer service
- 4 show good manners when dealing with your customers

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UNIT (2b)**Adapt Your Behaviour to Make a Good Customer Service Impression****Element 1 (2b.1)****Look and act the part**

		Performance Criteria			
No	Description of Evidence	1	2	3	4

UNIT (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Element 1 (2b.1)

Look and act the part

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 (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Element 2 (2b.2)

Relate to your customers and to colleagues effectively

Performance Criteria

When you adapt your behaviour to give a good customer service impression you must consistently:

- 1 explain the benefits of dealing with your customers face to face or by telephone rather than using text, e-mail or writing
- 2 talk clearly to customers using words that they can understand
- 3 talk to customers without using language that they would consider to be bad
- 4 show a willing and friendly attitude when dealing with your customers without being over-familiar
- 5 help and cooperate with colleagues to give good service to customers

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UNIT 2(b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Element 2 (2b.2)

Relate to your customers and to colleagues 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 (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

Knowledge and Understanding

To be competent at adapting your behaviour to give a good customer service impression you must know and understand:

- 2ba how the way you dress affects the way that your customers react to the service you provide
- 2bb how your organisation expects you to dress and why your customers may see particular types of dress as inappropriate
- 2bc why it is important for customers to feel that you are working hard to give them an excellent service
- 2bd why good timekeeping and making sure you are where you are expected to be is important to giving excellent customer service
- 2be what behaviour is considered by most customers to be 'good manners' and what is considered to be 'bad manners' or rudeness
- 2bf what customers and colleagues might consider to be bad language and why it may offend people
- 2bg why customers feel better about the service they receive if you have a willing and friendly attitude
- 2bh how to behave so that you appear to be willing and friendly with customers without being over-familiar
- 2bi what you can do to cooperate with colleagues in giving customer service and why that might be helpful

Evidence Requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on realistic working environment or a work placement is permissible. Simulation is not allowed for any evidence within this Unit.

Evidence Requirements (cont)

- 2 You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 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 need to include evidence that proves you are positive and customer-friendly with customers who are:
 - (a) easy-going
 - (b) difficult
- 5 You need to include evidence that proves you are positive and customer-friendly:
 - (a) during routine delivery of customer service
 - (b) during a busy time in your job
 - (c) during a quiet time in your job
- 6 You must include evidence that you have delivered customer service working with:
 - (a) colleagues at the same level
 - (b) more senior colleagues
- 7 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

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UNIT (2b)

Adapt Your Behaviour to Make a Good Customer Service Impression

No	Description of Evidence	Knowledge and Understanding									Evidence Requirements										
		2ba	2bb	2bc	2bd	2be	2bf	2bg	2bh	2bi	1	2	3	4a	4b	5a	5b	5c	6a	6b	7

UNIT (2b)

Adapt your behaviour to make a good customer service impression

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 (3) Communicate Effectively with Customers

This Unit has the following element:

Element 1 (3.1) Communicate effectively with customers

Unit Summary

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

To provide good customer service you need to understand what your customers want and how they feel. This means that you need to share information with them and listen carefully to them. Your customers need to understand what you are telling them and what you are able to do for them. Communication is an essential skill for delivering good customer service.

Throughout this Unit ‘your organisation’ means the organisation you work for or the organisation in which you have realistic work experience. ‘Your organisation’ may refer to the whole of the organisation or to the business unit, division or department with which you are involved.

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

Problem solving

- ◆ May provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

Communication

- ◆ Is unlikely to provide dual evidence opportunities for; writing
- ◆ May provide dual evidence opportunities for; reading and understanding
- ◆ Will probably provide dual evidence opportunities for; speaking

Numeracy

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

Information Technology

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

UNIT (3)

Communicate Effectively with Customers

Working with Others

- ◆ May provide dual evidence opportunities for; planning and checking and evaluation
- ◆ Will probably provide dual evidence opportunities for; acting in a group

Key words and phrases for this Unit

- ◆ communicating
- ◆ listening
- ◆ checking understanding
- ◆ summarising and passing on information
- ◆ body language
- ◆ showing respect
- ◆ passing messages
- ◆ questioning techniques
- ◆ summarising
- ◆ speaking clearly
- ◆ tone of voice
- ◆ passing on information

UNIT (3)

Communicate Effectively with Customers

Element 1 (3.1)

Communicate effectively with customers

Performance Criteria

When you communicate effectively with customers you must consistently:

- 1 listen effectively to what customers are saying
- 2 identify the most important things that customers are telling you
- 3 respond appropriately to what customers are telling you
- 4 check that you understand what customers are telling you and make sure it is really what they mean
- 5 summarise information for customers
- 6 explain in a way that is clear and does not cause offence when you cannot help a customer
- 7 use appropriate body language when communicating with customers
- 8 deal with customers in a respectful, helpful and professional way at all times
- 9 help to give good customer service by passing messages to colleagues

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UNIT (3)

Communicate Effectively with Customers

Element 1 (3.1)

Communicate effectively with customers

Notes/Comments



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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (3)

Communicate Effectively with Customers

Knowledge and Understanding

To be competent at communicating effectively with customers you must know and understand:

- 3a the difference between hearing and listening
- 3b how to listen effectively
- 3c how to read both positive and negative body language
- 3d how to use body language effectively
- 3e how to use questions to check that you understand what customers are telling you
- 3f the difference between negative and positive language
- 3g how to summarise
- 3h why it is important to speak clearly
- 3i why it is important to use words your customer will understand
- 3j how to communicate with customers who have language, dialect or accents that are different from yours
- 3k why the way you say things and your tone of voice affect the way your customer experiences your customer service
- 3l what information is helpful to pass on in messages to colleagues so that customers receive good service

Evidence Requirements

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

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 need to include evidence that proves you have communicated effectively with customers:
 - (a) during routine delivery of customer service
 - (b) during a busy time in your job
 - (c) during a quiet time in your job
- 5 You need to include evidence that proves you have communicated effectively with different customers who:
 - (a) have an easy-going attitude
 - (b) have a difficult attitude
 - (c) are easy to understand
 - (d) are difficult to understand
- 6 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.
- 7 The message you pass on to colleagues may be verbal, in writing or passed on by any other method you would be expected to use within your job.
- 8 You must include evidence that you have passed on messages to:
 - (a) colleagues at the same level
 - (b) more senior colleagues

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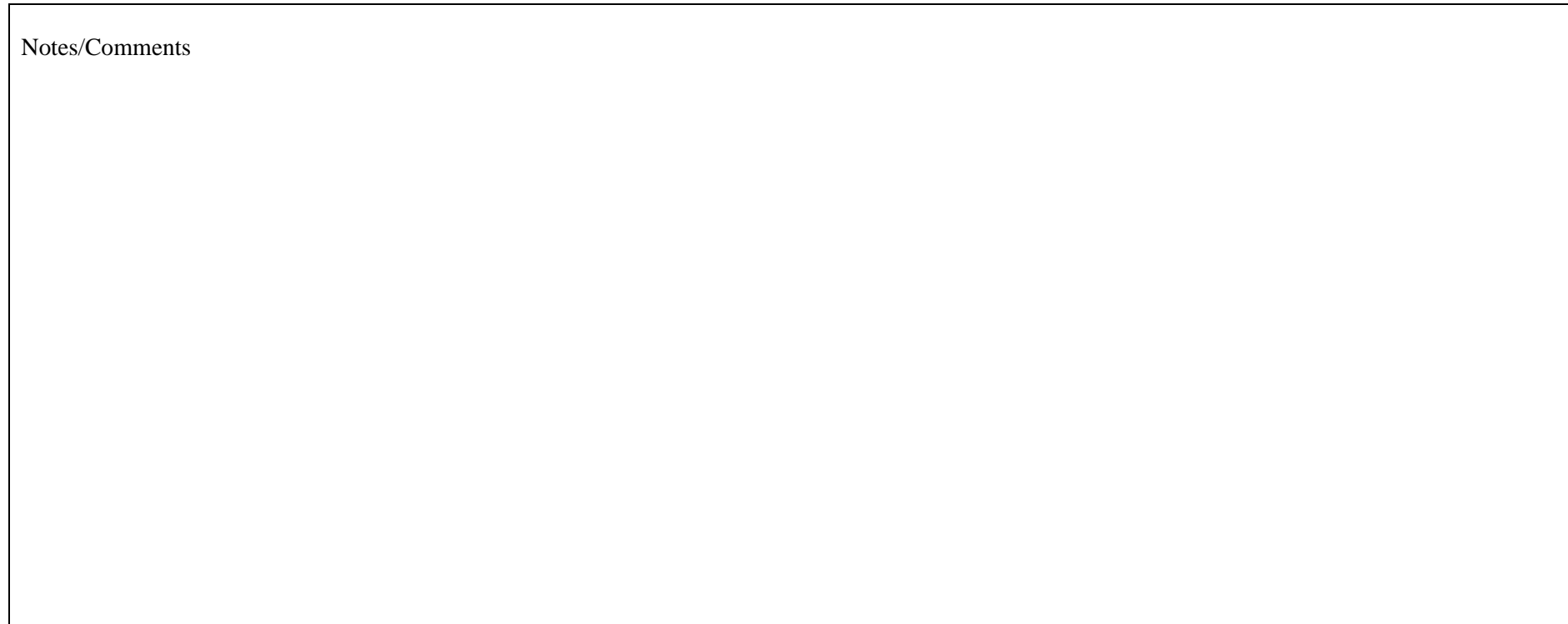
UNIT (3)

Communicate Effectively with Customers

Element 1 (3.1)

Communicate effectively with customers

Notes/Comments



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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (4) Do Your Job in a Customer Friendly Way

This Unit has the following element:

Element 1 (4.1) Do your job in a customer-friendly way

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.

The customer service your organisation gives is affected by the way you do your job. Whatever job you are doing, customers expect you to do it properly. They also expect you to consider their wishes and feelings while you are doing it.

This Unit covers how you do your job with your customer in mind. It will help you to understand the parts of your job that are most important to good customer service.

Throughout this Unit 'your organisation' means the organisation you work for or the organisation in which you have realistic work experience. 'Your organisation' may refer to the whole of the organisation or the business unit, division or department with which you are involved.

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

Problem Solving

- ◆ May provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

Communication

- ◆ May provide dual evidence opportunities for; reading and understanding, writing and speaking

Numeracy

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

Information Technology

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

UNIT (4)

Do Your Job in a Customer Friendly Way

Working with Others

- ◆ May provide dual evidence opportunities for; planning, acting in a group and checking and evaluation

Key words and phrases for this Unit

- ◆ first impressions
- ◆ personal image
- ◆ carrying out tasks
- ◆ share information
- ◆ working flexibly
- ◆ routine requests
- ◆ passing on information
- ◆ organising work
- ◆ the service offer
- ◆ individual responsibilities
- ◆ health and safety

UNIT (4) Do Your Job in a Customer Friendly Way

Element 1 (4.1) Do your job in a customer-friendly way

Performance Criteria

When you do your job in a customer-friendly way you must consistently:

- 1 make a good first impression
- 2 follow the dress code of your organisation and present the right personal image to your customers
- 3 do the tasks that make up your job correctly and in a way that shows you know what your customers expect and what your organisation offers
- 4 show consideration to customers when carrying out the tasks required in your job
- 5 respond willingly to routine requests and questions from customers and recognise when to pass a request on to an appropriate colleague
- 6 share information with customers about how delivery of the product or service is going
- 7 work flexibly to help individual customers without reducing the level of service you give to others
- 8 share information with colleagues when they need it to provide good customer service

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UNIT (4)

Do Your Job in a Customer Friendly Way

Element 1 (4.1)

Do your job in a customer-friendly way

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 (4)

Do Your Job in a Customer Friendly Way

Knowledge and Understanding

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

- 4a your organisation's dress code
- 4b how to do the tasks that make up your job
- 4c how long parts of the job take to do and how this may affect your customers
- 4d how to do your own work in an organised way
- 4e what your customers expect of you and your work
- 4f the service offer that your organisation makes in your area of work and how that affects the way you do things
- 4g what you are allowed to do and not allowed to do for customers
- 4h how to do your job in a way that is healthy and safe for you, your customers and your colleagues

Evidence Requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on realistic working environment or a work placement is permissible. Simulation is 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 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

Evidence Requirements (cont)

- 4 Your evidence must show that you have done your job in a customer-friendly way:
 - (a) during routine delivery of customer service
 - (b) during a busy time in your job
 - (c) during a quiet time in your job
- 5 You need to include evidence that proves you are doing your job in a customer-friendly for customers who are:
 - (a) easy-going
 - (b) difficult
- 6 You must include evidence that you have shared information with:
 - (a) colleagues at the same level
 - (b) more senior colleagues

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UNIT (4)

Do Your Job in a Customer Friendly Way

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5) Provide Customer Service within the Rules

This Unit has the following elements:

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

Unit Summary

This Unit sits within the customer service theme of customer service foundations. This theme covers the language and concepts of customer service as well as the organisational context and the external environment in which you have to work.

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

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

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

Problem Solving

- ◆ May provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

Communication

- ◆ Is unlikely to provide dual evidence opportunities for; writing
- ◆ May provide dual evidence opportunities for; reading and understanding
- ◆ Will probably provide dual evidence opportunities for; speaking

Numeracy

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

UNIT (5)

Provide Customer Service within the Rules

Information Technology

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

Working with Others

- ◆ May provide dual evidence opportunities for; planning, acting in a group and checking and evaluation

Key words and phrases for this Unit

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

UNIT (5) Provide Customer Service within the Rules

Element 1 (5.1) Follow organisation procedures

Performance Criteria

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

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

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UNIT (5)

Provide Customer Service within the Rules

Element 1 (5.1)

Follow organisation procedures

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5) Provide Customer Service within the Rules

Element 2 (5.2) Follow external regulation and legislation

Performance Criteria

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

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

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UNIT (5)

Provide Customer Service within the Rules

Element 2 (5.2)

Follow external regulation and legislation

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (5)

Provide Customer Service within the Rules

Knowledge and Understanding

People competent at providing customer service within the rules know and understand:

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

Evidence Requirements

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

Evidence Requirements (cont)

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

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of being willing and helpful with customers:
 - (a) during routine delivery of customer service
 - (b) during a busy period for your organisation
 - (c) during a quiet period for your organisation
 - (d) when people, systems or resources have let you down
- 5 Your evidence must show that:
 - (a) you have worked within your own limits of authority
 - (b) you have referred to somebody in authority when you have needed to
- 6 Your evidence must also include examples of rules that are based on:
 - (a) legislation
 - (b) sector or industry regulation
 - (c) your organisation's policies

UNIT (5)

Provide Customer Service within the Rules

Evidence Requirements (cont)

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

UNIT (5)

Provide Customer Service within the Rules

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

This Unit has the following elements:

Element 1 (6.1)

Recognise and deal with customer queries and requests

Element 2 (6.2)

Recognise and deal with customer problems

Unit Summary

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

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

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

Problem Solving

- ◆ Will probably provide dual evidence opportunities for; investigating, planning and solving and checking and evaluating

Numeracy

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

Information technology

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

Working with Others

- ◆ May provide dual evidence opportunities for; planning, acting in a group and checking and evaluation

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Communication

- ◆ May provide dual evidence opportunities for; reading and understanding and writing
- ◆ Will probably provide dual evidence opportunities for; speaking

Key words and phrases for this Unit

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

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Element 1 (6.1)

Recognise and deal with customer queries and requests

Performance Criteria

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

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

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UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Element 1 (6.1)

Recognise and deal with customer queries and requests

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Element 2 (6.2)

Recognise and deal with customer problems

Performance Criteria

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

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

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UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Element 2 (6.2)

Recognise and deal with customer problems

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

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Element 2 (6.2)

Recognise and deal with customer problems

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Knowledge and Understanding

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

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

Evidence Requirements

- 1 Wherever possible your evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence based on realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this Unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

Evidence Requirements (cont)

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

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UNIT (6)

Recognise and Deal with Customer Queries, Requests and Problems

Notes/Comments

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

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

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

Description of your current job **Relevant experience**

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



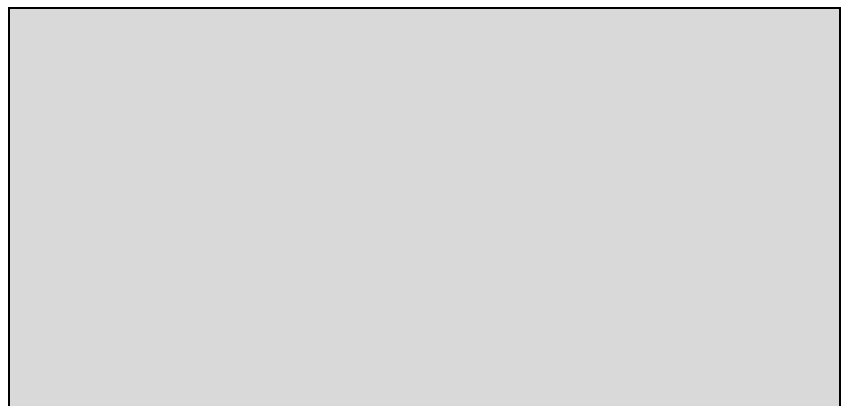
Type of Business



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 1

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:

Support Materials
Scottish Qualifications Authority
The Optima Building
58 Robertson Street
Glasgow G2 8DQ

Optional information:

Name:

Organisation: