

# **SVQ in Customer Service level 4 (G8NN 24)**

## **Candidate Guidance and Portfolio**

**Candidate name:**

**Publication code: Z0230**

**The National Occupational Standards which form the basis of this award were developed by Institute 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 Body (SSB) which is made up of representatives from the industry or profession and it is the SSB's responsibility to develop the national occupational standards.

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

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

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

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

## Who offers SVQs?

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

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

## What is the structure of an SVQ?

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

<b>Units and Elements</b>	<b>Units</b> define the broad functions carried out in your particular job and are made up of a number of <b>Elements</b> . Each <b>Element</b> describes a specific work activity which you have to perform and may relate to skills or to the demonstration of knowledge and understanding.
<b>Performance criteria</b>	The level and quality of how you should carry out these activities is determined by a number of statements called <b>Performance Criteria</b> . <b>Performance Criteria</b> are used to judge your competence.
<b>Range/Scope statements</b>	A <b>range statement</b> 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. <b>Range statements</b> are also called <b>scope</b> in some National Occupational Standards.
<b>Evidence requirements</b>	The <b>Evidence requirements</b> 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.
<b>Knowledge and understanding</b>	The section on <b>knowledge and understanding</b> states what you must know and understand and how this knowledge applies to your job.

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

You will find an example of an SVQ element overleaf.

## An example of an SVQ Element

**UNIT: (1) Working safely in an engineering environment**

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

**Element 1 Comply with statutory regulations and organisational requirements**

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

### Performance Criteria

You must ensure that you:

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

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

### Range

This means you need to cover:

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

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

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

### Evidence Requirements

The things you must prove that you can do:

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

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

### Knowledge and Understanding

You must prove that you know and understand:

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

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

## How are SVQs achieved?

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

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

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

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

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

Evidence may come from:

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

## How are SVQs assessed?

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

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

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

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



## Who does what in SVQs?

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

	<i>Who are they?</i>	<i>What is their role?</i>
<b>Candidates</b>	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).
<b>Assessors*</b>	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.
<b>Internal Verifiers*</b>	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.
<b>Approved Centres</b>	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.
<b>External Verifiers*</b>	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

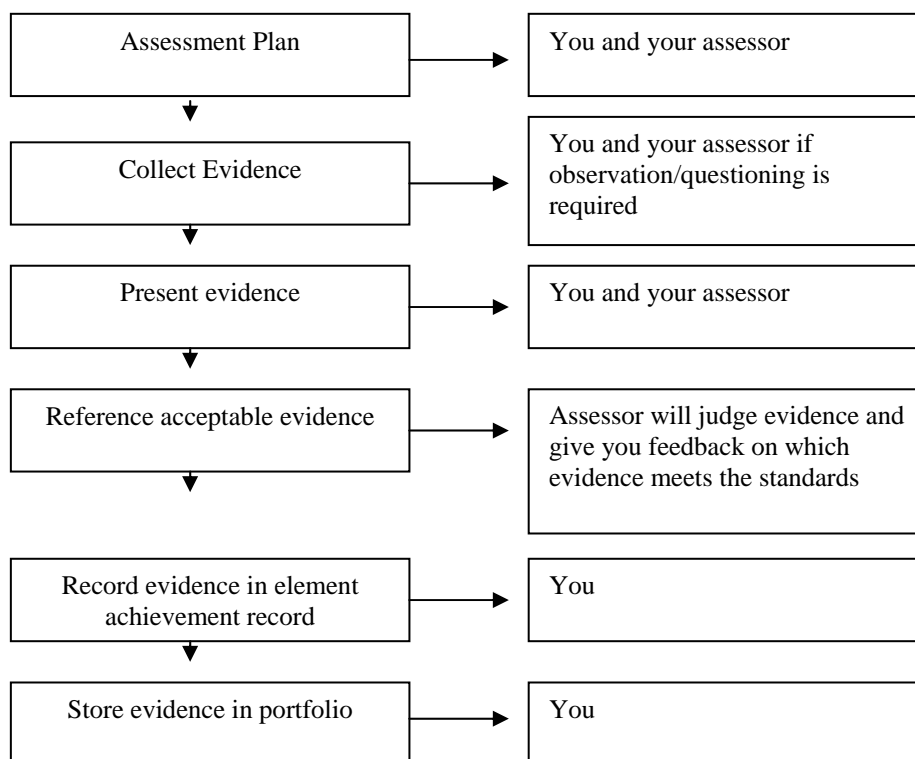
A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

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:

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

## 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

<b>Evidence number</b>	<b>Description of evidence</b>	<b>Included in portfolio (Yes/No) If no, state location</b>	<b>Sampled by the IV (initials and date)</b>
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.

<b>Mandatory</b>	206	301	302	303	308	
<b>Optional</b>	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: <b>materials</b> (consumables, removable storage media), <b>regulations</b> (current legislation, manufacturer's instructions, organisational procedures), <b>system</b> (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:	<b>Ian Cummings</b>	
Designation/relationship to candidate:	Line manager	
Details of testimony:		

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

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

Witness signature: *Ian Cummings*

Name: **Ian Cummings**

Date: **8/4/2000**

Please tick the appropriate box:

**A1/A2 or D32 / D33 Award**

**Familiar with the SVQ standards to which the candidate is working**

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

<b>Unit:</b> 301 Select & enable IT for use	<b>Element(s):</b> 1
<b>Evidence index number:</b> 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 4**

**Candidate:** \_\_\_\_\_

To achieve the whole qualification, you must prove competence in all **two mandatory** Units plus any **seven optional** Units.

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.

<b>Mandatory</b>	7	8							
<b>Optional</b>	18	20	27	28	29	30	33	35	42
	44	45	46	47	48				

### **Mandatory Units** (*all Units should be completed*)

<b>SQA Unit Number</b>	<b>SSB Unit Number</b>	<b>Title</b>	<b>Assessor</b>	<b>Internal Verifier</b>	<b>Date</b>
F05T 04	7	Understand Customer Service to Improve Service Delivery			
F04E 04	8	Know the Rules to Follow when Developing Customer Service			
<b>Optional Units:</b> <i>Candidates must achieve seven of the following Unit: at least one from each theme.</i>					
<i>Impression and Image</i>					
F05V 04	18	Use customer Service as a Competitive Tool			
F27P 04	20	Champion Customer Service			
<i>Delivery</i>					
F27R 04	27	Maintain and Develop a Healthy and Safe Customer Service Environment			
F27S 04	28	Plan, Organise and Control Customer Service Operations			
F27T 04	29	Evaluate the Quality of Customer Service			
F27V 04	30	Build and Maintain Effective Customer Relations			

<b>SQA Unit Number</b>	<b>SSB Unit Number</b>	<b>Title</b>	<b>Assessor</b>	<b>Internal Verifier</b>	<b>Date</b>
<i>Handling Problems</i>					
F01S 04	33	Apply Risk Assessment to Customer Service			
F27W 04	35	Handle Referred Customer Complaints			
<i>Development and Improvement</i>					
F04F 04	42	Lead a Team to Improve Customer Service			
F27X 04	44	Implement Quality Improvements to Customer Service			
F27Y 04	45	Plan and Organise the Development of Customer Service Staff			
F280 04	46	Develop a Customer Service Strategy for an Area			
F281 04	47	Work as a Member of a Team to Deliver Seamless Customer Service			
F282 04	48	Manage a Customer Service Award Programme			

## **UNIT (7)                    Understand Customer Service to Improve Service Delivery**

This Unit has the following elements:

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

### **Unit Summary**

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

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

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

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

#### Numeracy

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

#### Information Technology

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

## **UNIT (7)                    Understand Customer Service to Improve Service Delivery**

### **Key words and phrases for this Unit**

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

## **UNIT (7)                    Understand Customer Service to Improve Service Delivery**

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

#### **Performance Criteria**

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

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

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**UNIT (7) Understand Customer Service to Improve Service Delivery**

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

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (7)            Understand Customer Service to Improve Service Delivery**

### **Element 2 (7.2)            Place customer service principles in context for your professional customer service role**

#### **Performance Criteria**

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

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

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**UNIT (7)**

**Understand Customer Service to Improve Service Delivery**

**Element 2 (7.2)**

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

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (7)                      Understand Customer Service to Improve Service Delivery**

### **Knowledge and Understanding**

The knowledge and understanding relating to this Unit are contained in the Customer Service Standards (Performance Criteria).

### **Evidence Requirements**

- 1     Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 2     You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3     Your evidence must show that you have carried out background work and given detailed consideration to the statements in this Unit before asking to be assessed. Where examples are requested, you should be able to give a range of examples to enable your assessor to be confident in your breadth of knowledge and competence in meeting the requirements of the Unit.

### **Evidence Requirements (cont)**

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

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## UNIT (7)

## Understand Customer Service to Improve Service Delivery

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (8)                    Know the Rules to Follow when Developing Customer Service**

This Unit has the following elements:

- Element 1 (8.1)                    Develop customer service following organisational rules and procedures**
- Element 2 (8.2)                    Develop customer service following external regulation and legislation**

### **Unit Summary**

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

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

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

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

#### Numeracy

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

#### Information Technology

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

## **UNIT (8)                    Know the Rules to Follow when Developing Customer Service**

### **Key words and phrases for this Unit**

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

## **UNIT (8)            Know the Rules to Follow when Developing Customer Service**

### **Element 1 (8.1)        Develop customer service following organisational rules and procedures**

#### **Performance Criteria**

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

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

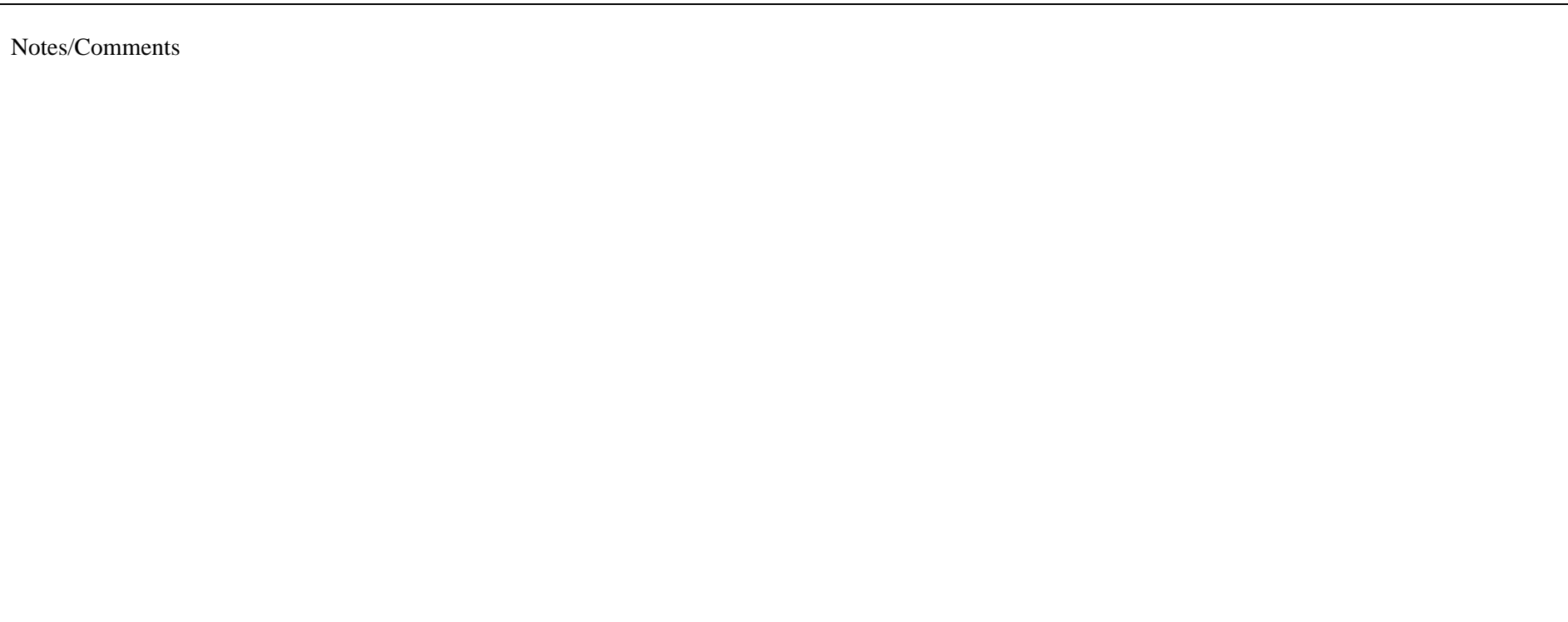
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**UNIT (8) Know the Rules to Follow when Developing Customer Service**

**Element 1 (8.1) Develop customer service following organisational rules and procedures**

Notes/Comments



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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## **UNIT (8) Know the Rules to Follow when Developing Customer Service**

### **Element 2 (8.2) Develop customer service following external regulation and legislation**

#### **Performance Criteria**

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

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

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**UNIT (8) Know the Rules to Follow when Developing Customer Service**

**Element 2 (8.2) Develop customer service following external regulation and legislation**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## UNIT (8) Know the Rules to Follow when Developing Customer Service

### Knowledge and Understanding

The knowledge and understanding relating to this Unit are contained in the Customer Service Standards (Performance Criteria).

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
- 2 You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 Your evidence must show that you have carried out background work and given detailed consideration to the statements in this Unit before asking to be assessed. Where examples are requested, you should be able to give a range of examples to enable your assessor to be confident in your breadth of knowledge and competence in meeting the requirements of the Unit.
- 4 The evidence that you are competent to describe or explain the customer service rules and regulations contained in this Unit may be gathered through question and answer, either verbally or in writing, or it may be inferred by observation of your behaviour when delivering customer service.

### Evidence Requirements

- 5 Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, or any other method that makes your assessor confident that you have a good understanding of the rules and regulations which need to be applied when working in the field of customer service at this level.
- 6 Your knowledge of the customer service rules and regulations must be explained or described from the context of real work.
- 7 Your evidence must include examples of rules that are based on:
  - (a) legislation
  - (b) sector or industry regulation
  - (c) your organisation's policies

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**UNIT (8)**

**Know the Rules to Follow when Developing Customer Service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## **UNIT (18)            Use Customer Service as a Competitive Tool**

This Unit has the following elements:

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

### **Unit Summary**

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

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

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

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

#### Numeracy

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

#### Information Technology

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

## **UNIT (18)            Use Customer Service as a Competitive Tool**

### **Key words and phrases for this Unit**

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

## **UNIT (18)            Use Customer Service as a Competitive Tool**

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

#### **Performance Criteria**

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

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

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**UNIT (18)**

**Use Customer Service as a Competitive Tool**

**Element 1 (18.1)**

**Organise customer service to gain a competitive advantage**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (18)            Use Customer Service as a Competitive Tool**

### **Element 2 (18.2)      Deliver a competitive service**

#### **Performance Criteria**

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

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

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**UNIT (18)      Use Customer Service as a Competitive Tool**

**Element 2 (18.2)      Deliver a competitive service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## UNIT (18)

## Use Customer Service as a Competitive Tool

### Knowledge and Understanding

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

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

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

### Evidence Requirements (cont)

- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence of using customer service as a competitive tool:
  - (a) during routine delivery of customer service
  - (b) during a busy period for your organisation
  - (c) during a quiet period for your organisation
  - (d) when people, systems or resources have let you down
- 5 You must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:
  - (a) tangible in that they can be measured
  - (b) intangible in that they are represented solely by feelings and perceptions of the customer experience
- 6 Your evidence must include examples of competitive analysis involving:
  - (a) direct competitors
  - (b) competitors offering substitute services or products
- 7 Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
  - (a) loyal customers
  - (b) customers returning from competitors
  - (c) new customers

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**UNIT (18)**

**Use Customer Service as a Competitive Tool**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (20)            Champion Customer Service**

This Unit has the following elements:

- Element 1 (20.1)            Promote the importance and benefits of customer service**
- Element 2 (20.2)            Provide advice and information on customer service issues**

### **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.

Staff with high levels of responsibility for customer service have an important role to play as champions of excellent service within their organisations. They should also promote customer service to service partners without whom their organisation cannot deliver reliable and excellent customer service. They need to have a great deal of knowledge and expertise from which others can benefit.

This Unit is about acting as a champion — being constantly alert for issues that affect customer service, analysing these issues and their implications, challenging on behalf of the customer and passing on your knowledge and expertise to others.

### **Key words and phrases for this Unit**

- ◆ promoting
- ◆ monitoring
- ◆ carrying out research
- ◆ analysing information
- ◆ organising

## **UNIT (20)            Champion Customer Service**

### **Element 1 (20.1)      Promote the importance and benefits of customer service**

#### **Performance Criteria**

When you champion customer service you must consistently:

- 1      explain the role of customer service within your organisation's strategic and business plans
- 2      continuously monitor developments in your organisation in order to identify those important to customer service
- 3      analyse the implications of these customer service developments
- 4      question and challenge developments from the customer's standpoint
- 5      use your influence to ensure that developments improve customer service





**UNIT (20)**

**Champion Customer Service**

**Element 1 (20.1)**

**Promote the importance and benefits of customer service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (20)            Champion Customer Service**

### **Element 2 (20.2)        Provide advice and information on customer service issues**

#### **Performance Criteria**

When you champion customer service you must consistently:

- 1        make it known that you can provide customer service advice and information
- 2        respond to requests for customer service advice and information
- 3        carry out any necessary research to enhance or verify the advice and information you are giving
- 4        communicate customer service advice and information effectively
- 5        help others to explore the implications of your advice and information for their own work and identify actions that the advice and information might prompt
- 6        monitor how effective your advice and information has been
- 7        review the way you collect information, formulate advice and communicate it to others

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**UNIT (20)**

**Champion Customer Service**

**Element 2 (20.2)**

**Provide advice and information on customer service issues**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

## UNIT (20)                      Champion Customer Service

### Knowledge and Understanding

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

- 20a the processes for decision making within your organisation and who is involved
- 20b how to monitor developments within your organisation
- 20c how to use your influence and authority to affect decision making
- 20d the types of developments that are likely to affect customer service and how to analyse the implications for customer service
- 20e the importance of empathising with customers and how to represent their viewpoint in a constructive way
- 20f how to identify when others need advice and information on customer service issues
- 20g how to use different types of research to support your advice and information on customer service
- 20h how to apply your advice and information in practice
- 20i how to monitor the effect of your advice and information

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

### Evidence Requirements (cont)

- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you have monitored developments that, in relation to your own area of responsibility, are:
  - (a) strategic
  - (b) operational
- 5 Your evidence must show that you have analysed the implications of customer service developments for:
  - (a) the quality of services or products
  - (b) the way services or products are delivered
  - (c) customer relationships
- 6 You must provide evidence that you have responded to requests for information and advice from at least two of these groups:
  - (a) front line staff
  - (b) supervisors or team leaders
  - (c) senior managers
  - (d) colleagues in other departments
  - (e) service partners

## **UNIT (20)          Champion Customer Service**

### **Evidence Requirements (cont)**

- 7     You must prove that you have provided information and advice about:
  - (a)   the quality of services or products
  - (b)   the way services or products are delivered
  - (c)   customer relationships
  
- 8     Your evidence must show that you have communicated customer service advice and information using at least two different communication media.





**UNIT (20)**

**Champion Customer Service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (27)            Maintain and Develop a Healthy and Safe Customer Service Environment**

This Unit has the following elements:

- Element 1 (27.1)            Assess the customer service environment for factors that affect health and safety**
- Element 2 (27.2)            Minimise risks to health and safety in the customer service environment**

### **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.

Health and safety is important in all areas of work, and customer service is no exception. To provide high levels of customer service it is also important to provide an environment that enables and encourages staff to work effectively but safely for themselves and for customers.

This Unit is all about managing the delivery of services or products in a way that is safe for customers and colleagues.

### **Key words or phrases for this Unit**

- ◆ assess environment
- ◆ health and safety
- ◆ identify hazards
- ◆ evaluate health and safety
- ◆ provide information
- ◆ control risks
- ◆ review health and safety
- ◆ emergency procedures
- ◆ record incidents

## **UNIT (27)            Maintain and Develop a Healthy and Safe Customer Service Environment**

### **Element 1 (27.1)        Assess the customer service environment for factors that affect health and safety**

#### **Performance Criteria**

When you maintain and develop a healthy and safe customer service environment you must consistently:

- 1     identify health and safety hazards in your customer service environment
- 2     assess the risks associated with these hazards
- 3     identify health and safety factors that may reduce the effectiveness of customer service staff or may cause concern to customers
- 4     evaluate these factors against your organisation's policies and procedures and customer expectations
- 5     provide information about risks and hazards to those responsible for health and safety



**UNIT (27)**

**Maintain and Develop a Healthy and Safe Customer Service Environment**

**Element 1 (27.1)**

**Assess the customer service environment for factors that affect health and safety**

Notes/Comments

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

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## **UNIT (27)            Maintain and Develop a Healthy and Safe Customer Service Environment**

### **Element 2 (27.2)        Minimise risks to health and safety in the customer service environment**

#### **Performance Criteria**

When you maintain and develop a healthy and safe customer service environment you must consistently:

- 1        ensure that staff have access to information on health and safety in the workplace and their responsibilities for health and safety
- 2        ensure that measures are in place to control risks to health and safety that are consistent with organisational policies and procedures
- 3        ensure that customers and staff are briefed on measures to control risks to health and safety and that they follow them
- 4        encourage staff to identify and report health and safety hazards
- 5        use agreed organisational procedures to deal with hazards when they occur
- 6        review the health and safety aspects of the customer service environment as required by law and your organisation
- 7        carry out emergency drills within your area of responsibility
- 8        follow the correct organisational procedures for keeping health and safety records up-to-date and for reporting health and safety incidents

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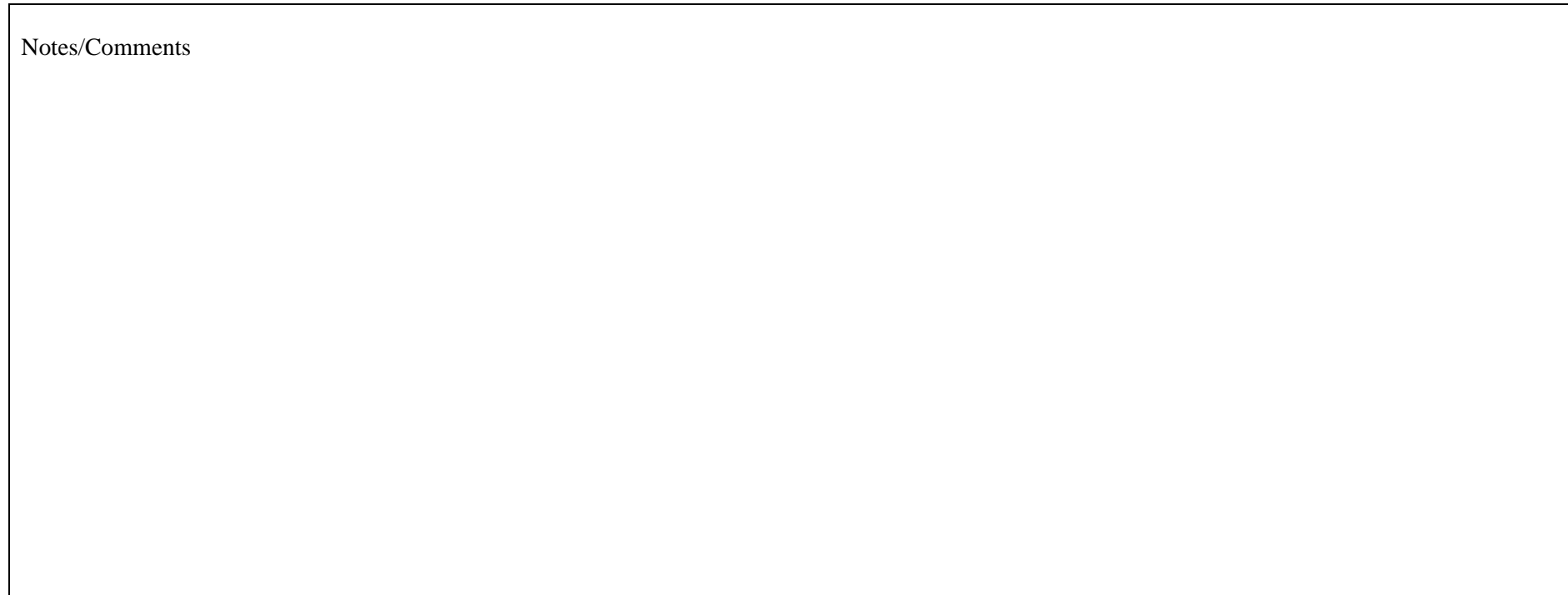
**UNIT (27)**

**Maintain and Develop a Healthy and Safe Customer Service Environment**

**Element 2 (27.2)**

**Minimise risks to health and safety in the customer service environment**

Notes/Comments



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

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## UNIT (27) Maintain and Develop a Healthy and Safe Customer Service Environment

### Knowledge and Understanding

To be competent at maintaining and developing a healthy and safe customer service environment you must know and understand:

- 27a the importance of maintaining a healthy, safe and effective working environment for customers and staff
- 27b your responsibilities for health and safety in the workplace
- 27c your responsibilities for maintaining an effective working environment
- 27d how to access information on legal and regulatory requirements for health and safety and relevant codes of practice
- 27e the types of health and safety hazards that are likely to occur in your area of responsibility
- 27f how to assess the risks associated with these health and safety hazards
- 27g how to control these risks in a way that is consistent with legal and regulatory requirements and codes of practice
- 27h your organisation's policies and procedures for health and safety
- 27i the recording and reporting procedures within your organisation that are relevant to maintaining a healthy and safe environment

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for performance evidence within this Unit except in as much as realistic practices are staged to test emergency procedures.

### Evidence Requirements (cont)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
- 4 Your evidence must show that you have assessed and controlled risks associated with:
  - (a) the use of equipment
  - (b) the working environment
  - (c) working practices
  - (d) potential breaches of security
  - (e) factors that affect the well-being of staff
  - (f) factors that affect the well-being of customers
- 5 You must prove that you have collected and evaluated key requirements of:
  - (a) legal requirements
  - (b) regulatory requirements
  - (c) organisational codes of practice
  - (d) ethical codes of practice

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**UNIT (27)**

**Maintain and Develop a Healthy and Safe Customer Service Environment**

Notes/Comments

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

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## **UNIT (28)            Plan, Organise and Control Customer Service Operations**

This Unit has the following elements:

<b>Element 1 (28.1)</b>	<b>Plan customer service operations</b>
<b>Element 2 (28.2)</b>	<b>Supervise customer service operations</b>
<b>Element 3 (28.3)</b>	<b>Deal with problems relating to customer service operations</b>

### **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.

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, you must be able to deal with these problems in a way that leaves your customer with a positive impression of your organisation.

This Unit is all about managing the delivery of services to the customer.

### **Key works and phrases for this Unit**

- ◆ plan operations
- ◆ organise operations
- ◆ control operations
- ◆ monitor
- ◆ evaluate
- ◆ negotiate
- ◆ targets
- ◆ feedback
- ◆ analyse
- ◆ assess

## **UNIT (28)            Plan, Organise and Control Customer Service Operations**

### **Element 1 (28.1)    Plan customer service operations**

#### **Performance Criteria**

When you plan, organise and control customer service operations you must consistently:

- 1    analyse customer expectations and define the service offer designed to meet those expectations
- 2    develop specific plans that will ensure sustainable and consistent delivery of customer service
- 3    identify any contingencies that may occur, assess their risks and develop effective plans to deal with them
- 4    plan how you will monitor and evaluate customer service operations





**UNIT (28) Plan, Organise and Control Customer Service Operations**

**Element 1 (28.1) Plan customer service operations**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (28) Plan, Organise and Control Customer Service Operations**

### **Element 2 (28.2) Supervise customer service operations**

#### **Performance Criteria**

When you plan, organise and control customer service operations you must consistently:

- 1 negotiate the availability of people and other resources that you need to implement your customer service delivery plans
- 2 develop specific, measurable and realistic targets for the staff who deliver customer service
- 3 ensure that planned resources are available when required
- 4 brief staff on their objectives and targets
- 5 encourage feedback from staff and customers and use their feedback to modify objectives and targets
- 6 collect and analyse feedback from customers and staff on customer service operations
- 7 evaluate how effectively agreed outcomes and processes are being achieved
- 8 modify your plans for customer service operations in the light of your evaluation

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**UNIT (28) Plan, Organise and Control Customer Service Operations**

**Element 2 (28.2) Supervise customer service operations**

Notes/Comments

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## **UNIT (28)            Plan, Organise and Control Customer Service Operations**

### **Element 3 (28.3)        Deal with problems relating to customer service operations**

#### **Performance Criteria**

When you plan, organise and control customer service operations you must consistently:

- 1    collect information on the nature of the problem and assess the likely impact on the customer
- 2    identify the causes of the problem and possible solutions
- 3    evaluate possible solutions against customer expectations and organisational needs
- 4    select and implement an acceptable solution with the minimum possible disruption to customers
- 5    monitor the implementation of the solution and, where necessary, make adjustments

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**UNIT (28) Plan, Organise and Control Customer Service Operations**

**Element 3 (28.3) Deal with problems relating to customer service operations**

Notes/Comments

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

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**Date:** \_\_\_\_\_

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## UNIT (28) Plan, Organise and Control Customer Service Operations

### Knowledge and Understanding

To be competent in planning, organising and controlling customer service operations you need to know and understand:

- 28a how to develop plans for customer service operations and what these plans should contain
- 28b how to identify and work within allocated budgets and time targets for customer service operations
- 28c the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them
- 28d the types of monitoring methods you can use and the criteria you should select to evaluate the effectiveness of customer service operations
- 28e how to develop objectives and targets for staff
- 28f the importance of briefing staff and how to do so effectively
- 28g the importance of monitoring the quality of your customer service operations
- 28h the types of problems that are likely to occur in your customer service operations and how to plan for dealing with these
- 28i the importance of liaising with customers and colleagues about problems and possible solutions
- 28j how to identify and evaluate possible solutions

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

### Evidence Requirements (cont)

- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your plans must provide evidence that you have taken into account:
  - (a) the aims, objectives and targets for your area of responsibility
  - (b) your organisation's customer service strategy
  - (c) your customers needs and expectations
- 5 Your evidence must show that your plans include consideration of:
  - (a) time
  - (b) physical resources
  - (c) human resources
  - (d) financial resources
- 6 You must show that you have negotiated with:
  - (a) front-line staff
  - (b) supervisors or team leaders
  - (c) senior managers
- 7 You must provide evidence that you have collected and analysed:
  - (a) qualitative information
  - (b) quantitative information

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**UNIT (28)**

**Plan, Organise and Control Customer Service Operations**

No	Description of Evidence	Knowledge and Understanding										Evidence Requirements													
		28a	28b	28c	28d	28e	28f	28g	28h	28i	28j	1	2	3	4a	4b	4c	5a	5b	5c	5d	6a	6b	6c	7a

**UNIT (28)**

**Plan, Organise and Control Customer Service Operations**

Notes/Comments

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

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## **UNIT (29)            Evaluate the Quality of Customer Service**

This Unit has the following elements:

- |                         |  |
|-------------------------|--|
| <b>Element 1 (29.1)</b> | <b>Plan how to measure customer service</b>                |
| <b>Element 2 (29.2)</b> | <b>Collect and analyse information on customer service</b> |

### **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.

Organisations need to know how effectively they are delivering customer service. Without this information, they will have no way of knowing if their customers are satisfied and are likely to remain loyal to the organisation. Nor will they know how they can improve customer service to meet and exceed customer expectations.

This Unit covers planning how you will measure standards of customer service, collecting and analysing information you need to evaluate the quality of customer service, developing conclusions and recommendations and then reporting your findings to relevant people.

### **Key words and phrases for this Unit**

- ◆ measure service
- ◆ customer satisfaction
- ◆ monitor delivery
- ◆ collect information
- ◆ analyse information
- ◆ improve customer service

## **UNIT (29)            Evaluate the Quality of Customer Service**

### **Element 1 (29.1)      Plan how to measure customer service**

#### **Performance Criteria**

When you evaluate the quality of customer service you must consistently:

- 1    identify the aspects of customer service delivery that affect customer satisfaction
- 2    plan how you will monitor the aspects of customer service delivery that affect customer satisfaction
- 3    plan how you will analyse the information you have collected

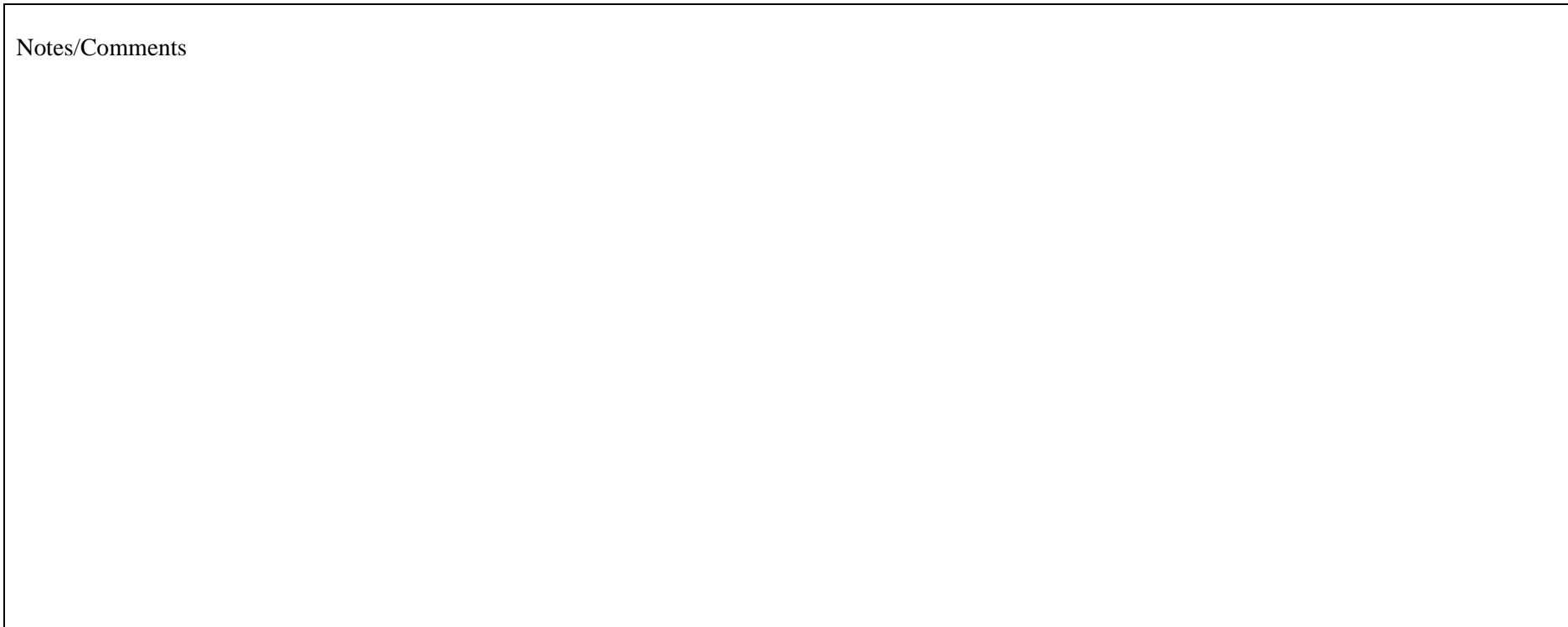




**UNIT (29) Evaluate the Quality of Customer Service**

**Element 1 (29.1) Plan how to measure customer service**

Notes/Comments



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

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## **UNIT (29) Evaluate the Quality of Customer Service**

### **Element 2 (29.2) Collect and analyse information on customer service**

#### **Performance Criteria**

When you evaluate the quality of customer service you must consistently:

- 1 implement your plans for monitoring customer service processes and outcomes
- 2 analyse the monitoring information you have collected
- 3 compare the conclusions of your analysis with the criteria you identified
- 4 adapt your plans if the agreed methods of collecting and analysing information are not proving effective
- 5 communicate the results of your measurement of customer service to colleagues
- 6 agree actions to improve customer service that result from your measurements and analysis



**UNIT (29) Evaluate the Quality of Customer Service**

**Element 2 (29.2) Collect and analyse information on customer service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## UNIT (29) Evaluate the Quality of Customer Service

### Knowledge and Understanding

To be competent in evaluating the quality of customer service you need to know and understand:

- 29a the importance of measuring the quality of customer service.
- 29b how to identify which aspects of the customer service process affect customer satisfactions
- 29c how to select the criteria you will use for measurement of customer service
- 29d how to construct representative samples
- 29e the types of information collection methods you could use
- 29f methods of analysing information on the quality of customer service
- 29g how to identify recommendations that flow from your measurement of customer service
- 29h the procedures for making recommendations within your organisation

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

### Evidence Requirements (cont)

- 4 You must include evidence of collecting and analysing information that is:
  - (a) quantitative
  - (b) qualitative
- 5 Your communication of the results of your measurements may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.
- 6 Your evidence must show that you have communicated the results of your measurements to at least three of these groups of people:
  - (a) front line staff
  - (b) supervisors or team leaders
  - (c) senior managers
  - (d) colleagues in other departments
  - (e) service partners



**UNIT (29)**

**Evaluate the Quality of Customer Service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (30)            Build and Maintain Effective Customer Relations**

This Unit has the following elements:

- Element 1 (30.1)            Establish effective customer relations**
- Element 2 (30.2)            Maintain and develop effective customer relations**

### **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.

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty.

This Unit is about establishing and maintaining such relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success.

### **Key word and phrases for this Unit**

- ◆ build customer relations
- ◆ build longer-term relationships
- ◆ promote loyalty
- ◆ two-way communication
- ◆ accept criticism
- ◆ collect feedback
- ◆ analyse relationships

## **UNIT (30)            Build and Maintain Effective Customer Relations**

### **Element 1 (30.1)        Establish effective customer relations**

#### **Performance Criteria**

When you build and develop effective customer relations you must consistently:

- 1     identify the types of people with whom you should build longer-term customer relations and promote loyalty
- 2     communicate with these customers so that they know they are important to your organisation
- 3     explain your role, the purpose of making contact and the mutual benefits of building a longer-term relationship
- 4     make it clear that you welcome two-way communication about customer expectations



**UNIT (30)      Build and Maintain Effective Customer Relations**

**Element 1 (30.1)      Establish effective customer relations**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (30)            Build and Maintain Effective Customer Relations**

### **Element 2 (30.2)        Maintain and develop effective customer relations**

#### **Performance Criteria**

When you build and develop effective customer relations you must consistently:

- 1     keep customers informed and accept criticism from customers openly and constructively
- 2     regularly assess whether customer expectations are being consistently met
- 3     use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded
- 4     collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction
- 5     analyse customer relations and propose changes that will develop longer-term loyalty to people with authority in your organisation

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**UNIT (30)            Build and Maintain Effective Customer Relations**

**Element 2 (30.2)        Maintain and develop effective customer relations**

Notes/Comments

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

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**Assessor:** \_\_\_\_\_

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## UNIT (30) Build and Maintain Effective Customer Relations

### Knowledge and Understanding

To be competent at building and developing effective customer relations you need to know and understand:

- 30a how to identify and prioritise types of customers with whom you should be building a longer-term relationship
- 30b the most appropriate method of establishing relationships with customers targeted for longer-term relationships
- 30c the importance of effective communication skills when dealing with customers
- 30d how to explore and agree with customers the mutual benefits of maintaining and developing a longer-term relationship
- 30e how to communicate with customers, especially when they are dissatisfied with products and services
- 30f how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
- 30g the types of compromises that would be acceptable to your organisation when meeting customer expectations
- 30h how to use your influence and authority in your organisation to meet or exceed customer expectations
- 30i methods of monitoring customer satisfaction appropriate to your level of authority in the organisation

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

### Evidence Requirements (cont)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you can build and maintain relationships with:
  - (a) potential or new customers
  - (b) regular or returning customers
  - (c) customers with particular needs and expectations
  - (d) customers who have experienced problems with your organisation's services or products
- 5 Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.
- 6 You must provide evidence that you have collected feedback that is:
  - (a) qualitative
  - (b) quantitative
  - (c) formal
  - (d) informal

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**UNIT (30)**

**Build and Maintain Effective Customer Relations**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

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## **UNIT (33)            Apply Risk Assessment to Customer Service**

This Unit has the following elements:

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

### **Unit Summary**

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

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

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

#### Numeracy

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

#### Information Technology

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

## **UNIT (33)            Apply Risk Assessment to Customer Service**

### **Key words and phrases for this Unit**

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

## **UNIT (33)            Apply Risk Assessment to Customer Service**

### **Element 1 (33.1)        Analyse customer service processes for risk**

#### **Performance Criteria**

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

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

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**UNIT (33)**

**Apply Risk Assessment to Customer Service**

**Element 1 (33.1)**

**Analyse customer service processes for risk**

Notes/Comments

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

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## **UNIT (33)            Apply Risk Assessment to Customer Service**

### **Element 2 (33.2)        Assess customer service risks and take appropriate actions**

#### **Performance Criteria**

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

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

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**UNIT (33)**

**Apply Risk Assessment to Customer Service**

**Element 2 (33.2)**

**Assess customer service risks and take appropriate actions**

Notes/Comments

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## UNIT (33) Apply Risk Assessment to Customer Service

### Knowledge and Understanding

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

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

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

### Evidence Requirements (cont)

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

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**UNIT (33)**

**Apply Risk Assessment to Customer Service**

Notes/Comments

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

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## **UNIT (35)            Handle Referred Customer Complaints**

This Unit has the following elements:

- Element 1 (35.1)        Investigate referred customer complaints**
- Element 2 (35.2)        Take action to deal with referred customer complaints**
- Element 3 (35.3)        Identify repeated customer complaints and recommend changes to policies and procedures**

### **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.

However effectively customer service is organised, customers will have complaints from time to time. Sometimes, front-line staff or supervisors can deal with these complaints, however, sometimes more senior staff must deal with the complaint. This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level.

This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

## **UNIT (35)            Handle Referred Customer Complaints**

### **Key Words and phrases for this Unit**

- ◆ referred complaints
- ◆ personal responsibility
- ◆ limits of authority
- ◆ follow procedures
- ◆ implement solutions
- ◆ analyse complaints
- ◆ identify changes
- ◆ identify patterns and trends
- ◆ consider benefits
- ◆ consider drawbacks
- ◆ select amongst options

## **UNIT (35)            Handle Referred Customer Complaints**

### **Element 1 (35.1)      Investigate referred customer complaints**

#### **Performance Criteria**

When you handle referred customer complaints you must consistently:

- 1      collect all the available information on the nature of the complaint, and identify and analyse the organisational implications of the complaint
- 2      take personal responsibility for dealing with the complaint subject to the limits of your authority
- 3      keep your customer informed about what steps are being taken to deal with their complaint
- 4      follow the correct procedures if your customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation

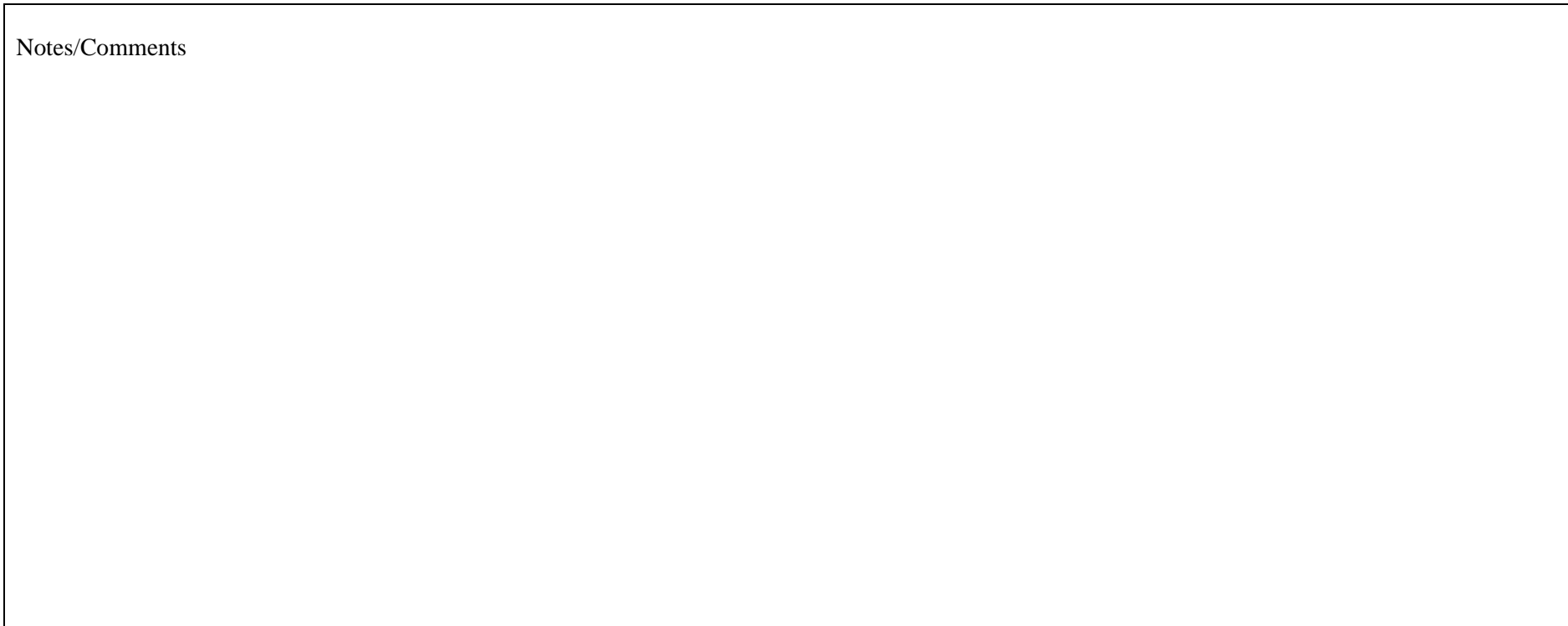
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**UNIT (35)            Handle Referred Customer Complaints**

**Element 1 (35.1)    Investigate referred customer complaints**

Notes/Comments



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## **UNIT (35)            Handle Referred Customer Complaints**

### **Element 2 (35.2)        Take action to deal with referred customer complaints**

#### **Performance Criteria**

When you handle referred customer complaints you must consistently:

- 1     identify a range of possible solutions that balance customer expectations and your organisation's service offer
- 2     liaise with your customer and colleagues to negotiate an acceptable solution
- 3     agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
- 4     implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken

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**UNIT (35)            Handle Referred Customer Complaints**

**Element 2 (35.2)      Take action to deal with referred customer complaints**

Notes/Comments

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## **UNIT (35)            Handle Referred Customer Complaints**

### **Element 3 (35.3)        Identify repeated customer complaints and recommend changes to policies and procedures**

#### **Performance Criteria**

When you handle referred customer complaints you must consistently:

- 1     analyse customer complaints over a significant period of time
- 2     identify patterns and trends and the solutions that prove to be acceptable to your customer and fit the organisation's service offer
- 3     identify possible changes to customer service policies and procedures
- 4     consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
- 5     select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers

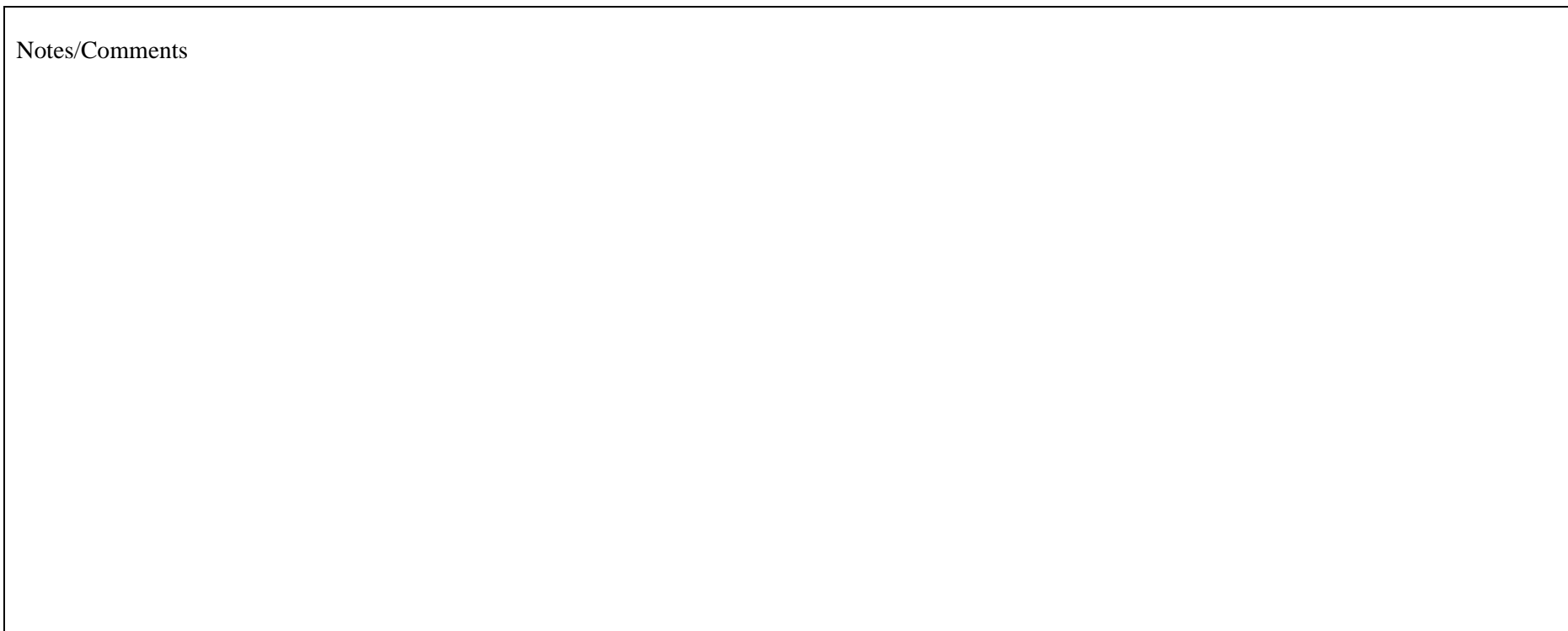
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**UNIT (35)            Handle Referred Customer Complaints**

**Element 3 (35.3)        Identify repeated customer complaints and recommend changes to policies and procedures**

Notes/Comments



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

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## UNIT (35) Handle Referred Customer Complaints

### Knowledge and Understanding

To be competent at handling referred customer complaints you need to know and understand:

- 35a the importance of minimising customer complaints and dealing with them effectively and promptly when they occur
- 35b your organisation's complaints procedures and the limits of your authority
- 35c the procedures you must follow if a complaint is likely to be escalated or have wider implications
- 35d the types of complaints that could have wider implications for your organisation
- 35e why it is important to communicate with your customer at all stages of a complaints procedure
- 35f how to devise solutions that balance customer expectations and organisational aims
- 35g why it is important to identify and present to the customer a range of possible options
- 35h why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
- 35i how to identify trends and patterns in customer complaints and solutions
- 35j how to explore the implications of these patterns and trends for your organisation's policies and procedures
- 35k how to recommend changes to organisational policies and procedures

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organization.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must provide evidence that you have collected and analysed:
  - (a) qualitative information
  - (b) quantitative information
- 5 You must show that you have dealt with complaints from customers who are:
  - (a) prepared to accept your proposed solutions
  - (b) not prepared to accept your proposed solutions
  - (c) senior managers

## **UNIT (35)            Handle Referred Customer Complaints**

### **Evidence Requirements (cont)**

- 6     You must show that you have negotiated with:
  - (a)   front-line staff
  - (b)   supervisors or team leaders
  - (c)   senior managers
  
- 7     The complaints 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
  
- 8     Your evidence should include examples of when a complaint has been escalated to involve:
  - (a)   somebody more senior in your own organisation
  - (b)   somebody external to your organisation



**UNIT (35)**

**Handle Referred Customer Complaints**

Notes/Comments

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

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## **UNIT (42)            Lead a Team to Improve Customer Service**

This Unit has the following elements:

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

### **Unit Summary**

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

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

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

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

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

#### Numeracy

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

#### Information Technology

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

## **UNIT (42)          Lead a Team to Improve Customer Service**

### **Key words and phrases for this Unit**

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

## **UNIT (42)            Lead a Team to Improve Customer Service**

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

#### **Performance Criteria**

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

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

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**UNIT (42)            Lead a Team to Improve Customer Service**

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

Notes/Comments

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

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## **UNIT (42)            Lead a Team to Improve Customer Service**

### **Element 2 (42.2)    Provide support for team members**

#### **Performance Criteria**

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

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

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**UNIT (42)            Lead a Team to Improve Customer Service**

**Element 2 (42.2)    Provide support for team members**

Notes/Comments

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

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## **UNIT (42)            Lead a Team to Improve Customer Service**

### **Element 3 (42.3)        Review performance of team members**

#### **Performance Criteria**

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

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

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**UNIT (42)            Lead a Team to Improve Customer Service**

**Element 3 (42.3)    Review performance of team members**

Notes/Comments

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

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## UNIT (42)      Lead a team to improve customer service

### Knowledge and Understanding

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

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

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
- 4 You must prove you have line management or supervisory responsibility for the team members used in your evidence.

### Evidence Requirements (cont)

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

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**UNIT (42)**

**Lead a Team to Improve Customer Service**

Notes/Comments

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

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## **UNIT (44)            Implement Quality Improvements to Customer Service**

This Unit has the following elements:

- Element 44 (44.1)    Plan the introduction of customer service improvements**
- Element 44 (44.2)    Manage the implementations of customer service improvements**
- Element 44 (44.3)    Monitor and evaluate customer service improvements**

### **Unit Summary**

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

Introducing quality improvements to customer service requires careful management of change.

This Unit covers the detailed planning of improvements, managing the changes that need to take place to implement the improvements and then evaluating the results. It includes the consultation and communication processes that are vital to the successful implementation of improvements and management of change. In particular, it is vital to involve customers at all stages.

### **Key word and phrases for this Unit**

- ◆ plan improvements
- ◆ evaluate improvements
- ◆ risks
- ◆ set objectives
- ◆ introduce improvements
- ◆ inform people
- ◆ implement plans
- ◆ support colleagues
- ◆ monitor and evaluate results

## **UNIT (44)            Implement Quality Improvements to Customer Service**

### **Element 44 (44.1)    Plan the introduction of customer service improvements**

#### **Performance Criteria**

When you implement quality improvements to customer service you must consistently:

- 1     identify possible customer service improvements and the resources available to implement them
- 2     evaluate factors that may help or hinder the introduction of change
- 3     develop realistic objectives, tasks and schedules for the introduction of improvements and agree them with colleagues
- 4     assess the risks associated with each action to effect change
- 5     plan how you will evaluate the proposed improvements





**UNIT (44)            Implement Quality Improvements to Customer Service**

**Element 44 (44.1)    Plan the introduction of customer service improvements**

Notes/Comments

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

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## **UNIT (44)            Implement Quality Improvements to Customer Service**

### **Element 44 (44.2)    Manage the implementations of customer service improvements**

#### **Performance Criteria**

When you implement quality improvements to customer service you must consistently:

- 1     inform the people who will be affected by change, win their support and keep them informed of progress
- 2     implement your plans for improvements dealing effectively with any difficulties
- 3     provide the necessary support to all your colleagues who are involved
- 4     ensure that the planned improvements are implemented on time and within budget

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**UNIT (44)            Implement Quality Improvements to Customer Service**

**Element 44 (44.2)    Manage the implementations of customer service improvements**

Notes/Comments

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

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## **UNIT (44)            Implement Quality Improvements to Customer Service**

### **Element 44 (44.3)    Monitor and evaluate customer service improvements**

#### **Performance Criteria**

When you implement quality improvements to customer service you must consistently:

- 1     monitor and evaluate the impact that the changes are having on the quality of customer service
- 2     identify and recommend any further changes that may be necessary to achieve the planned aims and objectives of the improvements
- 3     identify any lessons from the change process and note these for future activities

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**UNIT (44)            Implement Quality Improvements to Customer Service**

**Element 44 (44.3)    Monitor and evaluate customer service improvements**

Notes/Comments

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

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## UNIT (44) Implement Quality Improvements to Customer Service

### Knowledge and Understanding

To be competent in implementing quality improvements to customer service you must know and understand:

- 44a the importance of careful planning when introducing change
- 44b the types of factors that may help or hinder the process of change and how to identify and plan for these
- 44c how to develop plans that contain realistic objectives, tasks and schedules
- 44d the importance of having clear lines of responsibility and accountability
- 44e how to identify and plan for possible contingencies
- 44f the importance of clear communication when changes are taking place
- 44g why it is important to win the support of people who will be affected by change
- 44h how to win over staff who are resistant to change
- 44i the types of support that staff may need when improvements are being implemented and how to provide such support
- 44j why it is important to complete change on time and within budget
- 44k how to monitor and evaluate the impact of change
- 44l why it is important to evaluate change and to note any lessons for future initiatives

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

### Evidence Requirements (cont)

- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must include planning for and using the following resources when implementing improvements to customer service:
  - (a) time
  - (b) human resources
  - (c) physical resources
  - (d) financial resources
- 5 You must provide evidence of communicating with:
  - (a) customers
  - (b) front-line staff
  - (c) colleagues
  - (d) supervisors/team leaders
  - (e) senior managers
  - (f) service partners
- 6 Your communication 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 You must include evidence of collecting, analysing and using information that is:
  - (a) quantitative
  - (b) qualitative

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**UNIT (44)**

**Implement Quality Improvements to Customer Service**

Notes/Comments

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

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## **UNIT (45)            Plan and Organise the Development of Customer Service Staff**

This Unit has the following elements:

- Element 1 (45.1)            Identify customer service staff development and training needs**
- Element 2 (45.2)            Organise customer service development and training**

### **Unit Summary**

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

Achieving excellent customer service depends on the skills and knowledge of the staff who provide it.

To be effective, organisations constantly need to review how effective their customer service is and what improvements should be made. Sometimes improvements will depend on the development of staff skills.

New staff must be brought to the required standards and established staff needs to be updated on new procedures and techniques or refreshed on existing ones. Senior staff have an important contribution to make to this process.

This Unit is all about identifying what development and training is needed for staff, organising its delivery and monitoring its success.

### **Key words and phrases for this Unit**

- ◆ identify staff training needs
- ◆ identify staff development needs
- ◆ work with staff
- ◆ identify staff training activities
- ◆ identify staff development activities
- ◆ organise staff development and training
- ◆ agree aims and objectives
- ◆ design training and development activities
- ◆ monitor performance

## **UNIT (45)            Plan and Organise the Development of Customer Service Staff**

### **Element 1 (45.1)        Identify customer service staff development and training needs**

#### **Performance Criteria**

When you plan and organise the development of customer service staff you must consistently:

- 1     Identify where customer service could be improved through staff training and development
- 2     Help staff providing customer service to identify their own development and training needs
- 3     Help staff to identify how they learn best
- 4     Agree the types of staff development and training activities that are needed
- 5     Report these staff development needs to relevant people in your organisation

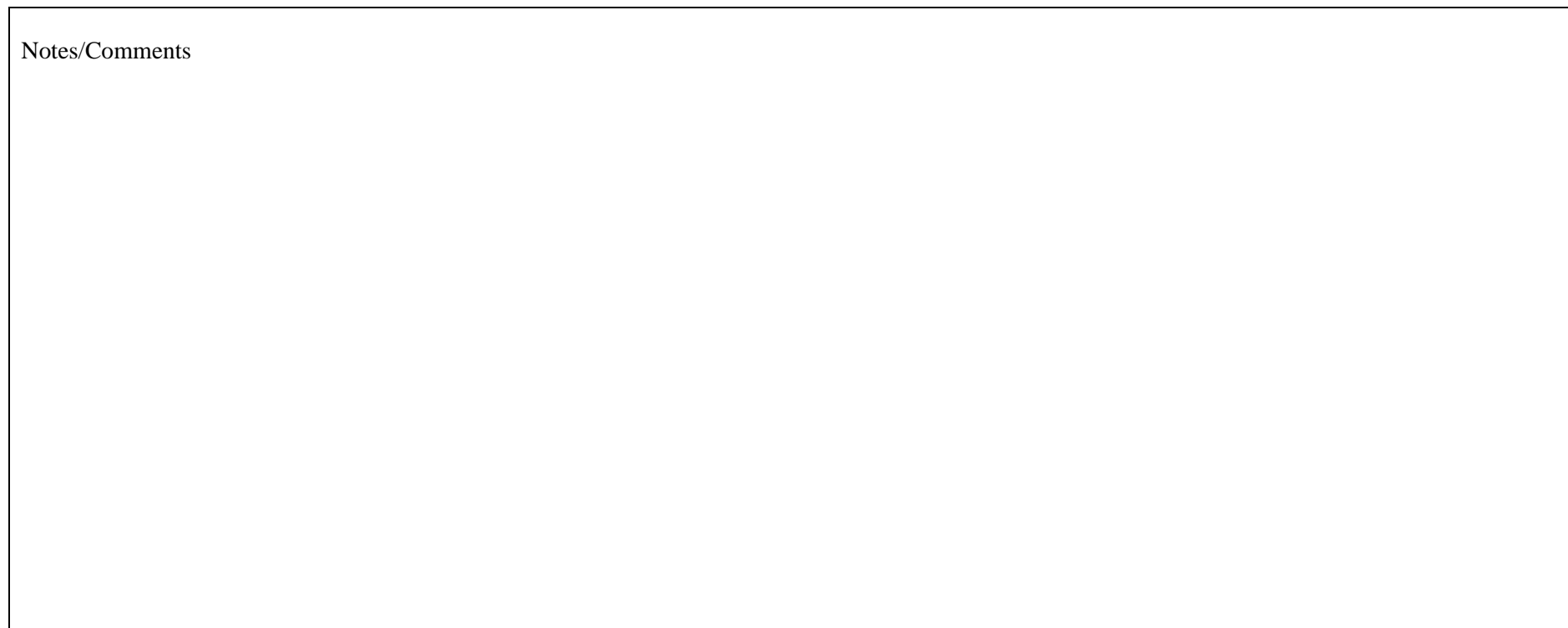




**UNIT (45) Plan and Organise the Development of Customer Service Staff**

**Element 1 (45.1) Identify customer service staff development and training needs**

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 (45) Plan and Organise the Development of Customer Service Staff**

### **Element 2 (45.2) Organise customer service development and training**

#### **Performance Criteria**

When you plan and organise the development of customer service staff you must consistently:

- 1 agree the aims and objectives of the customer service development and training activities
- 2 agree the type and style of customer service development and training that are appropriate
- 3 agree the detailed design of customer service development and training activities
- 4 organise customer service development and training activities
- 5 monitor the performance of staff involved in the development and training activities to be sure that learning has been put into practice
- 6 organise additional help and training for staff where this is needed

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**UNIT (45) Plan and Organise the Development of Customer Service Staff**

**Element 2 (45.2) Organise customer service development and training**

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 (45) Plan and Organise the Development of Customer Service Staff

### Knowledge and Understanding

To be competent in planning and organising the development of customer service staff you need to know and understand:

- 45a the importance of continuously developing staff that provide customer service
- 45b current objectives and targets that relate to customer service in your area of responsibility
- 45c how to identify when development and training could improve customer service performance
- 45d the range of types and styles of development and training and how to select those that are appropriate to customer service, your organisation, and specific training and development needs
- 45e why it is important that you should have an input into the design and delivery of customer service development and training
- 45f how you can help staff to put into practice what they have learned
- 45g how to assess the impact that development and training has had on customer service performance
- 45h the types of additional support you could provide to staff following development and training

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

### Evidence Requirements (cont)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
- 4 Your evidence must show that you have been involved with the training and development of staff in groups such as new staff, established staff, front-line staff, supervisors and team leaders, part-time staff, support staff or service partners.
- 5 You must show that you monitor the performance of staff involved in development and training activities through:
  - (a) formal monitoring mechanisms such as appraisals and Key Performance Indicators (KPIs)
  - (b) less formal and more immediate monitoring such as direct supervision

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**UNIT (45)**

**Plan and Organise the Development of Customer Service Staff**

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 (46)            Develop a Customer Service Strategy for an Area**

This Unit has the following elements:

- Element 1 (46.1)            Research and evaluate your organisation's business and customer service strategy**
- Element 2 (46.2)            Help to identify current and future best practice in customer service**
- Element 3 (46.3)            Identify and recommend the key features of a customer service strategy**

### **Unit Summary**

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

If organisations want to be consistently successful in customer service over a period of time, they need a customer service strategy. Managers and other senior staff can contribute to this through their knowledge of the organisation's customers and their expertise in customer service. Usually this will also be based on what they know of other organisations and published research into current and future trends in customer service.

This Unit does not assume you have full responsibility for your organisation's customer service strategy but that you take a major role in the development of strategy for a particular area.

## **UNIT (46)            Develop a Customer Service Strategy for an Area**

### **Key words and phrases for this Unit**

- ◆ research a customer service strategy
- ◆ evaluate implications
- ◆ collect information
- ◆ analyse customer expectations
- ◆ identify current best practice
- ◆ identify future best practice
- ◆ discuss outcomes
- ◆ identify key features of service strategy
- ◆ identify contact process and channels
- ◆ identify values, aims and objectives
- ◆ identify evaluation method
- ◆ construct a customer service strategy

## **UNIT (46)            Develop a Customer Service Strategy for an Area**

### **Element 1 (46.1)        Research and evaluate your organisation's business and customer service strategy**

#### **Performance Criteria**

When you develop a customer service strategy for an area you must consistently:

- 1     identify your organisation's values, aims and objectives
- 2     identify the role of a given area of the business in achieving the strategy
- 3     evaluate the implications of the strategy for customer service in this area
- 4     confirm the implications of the strategy for customer service with colleagues
- 5     collect information on and analyse customer expectations
- 6     match customer expectations with the customer service implications of the business strategy for a given area

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**UNIT (46)          Develop a Customer Service Strategy for an Area**

**Element 1 (46.1)      Research and evaluate your organisation's business and customer service strategy**

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 (46)            Develop a Customer Service Strategy for an Area**

### **Element 2 (46.2)        Help to identify current and future best practice in customer service**

#### **Performance Criteria**

When you develop a customer service strategy for an area you must consistently:

- 1     identify other organisations which represent models of good practice in customer service
- 2     evaluate the key features of customer service in these organisations and the principles that underpin their approaches
- 3     identify and analyse current research on trends and developments in customer service
- 4     identify and analyse relevant legal and regulatory requirements, codes of practice and ethical considerations
- 5     explore the implications of your research for the area you are working in
- 6     discuss the outcomes of your research with colleagues

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**UNIT (46)          Develop a Customer Service Strategy for an Area**

**Element 2 (46.2)      Help to identify current and future best practice in customer service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **UNIT (46)            Develop a Customer Service Strategy for an Area**

### **Element 3 (46.3)        Identify and recommend the key features of a customer service strategy**

#### **Performance Criteria**

When you develop a customer service strategy for an area you must consistently:

- 1     identify values, aims and objectives that are consistent with your research
- 2     identify contact processes and channels for customer service that are consistent with your values, aims and objectives
- 3     identify how you will evaluate the effectiveness of the strategy
- 4     discuss with colleagues the key features of a customer service strategy
- 5     construct a customer service strategy for the chosen area and agree it with colleagues and managers

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**UNIT (46)          Develop a Customer Service Strategy for an Area**

**Element 3 (46.3)      Identify and recommend the key features of a customer service strategy**

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 (46)                      Develop a Customer Service Strategy for an Area

### Knowledge and Understanding

To be competent in developing a customer service strategy for an area you need to know and understand:

- 46a the importance of having a customer service strategy for a given area of the business
- 46b how to access information on your organisation's overall business strategy and analyse its implications
- 46c sources of information you can use to find out about your customers and their expectations
- 46d the importance of customer loyalty and customer service practices that can help to retain loyalty
- 46e how to identify other organisations which might represent models of best practice in customer service
- 46f sources of research on trends and developments in customer service
- 46g how to develop values, aims and objectives relevant to customer service
- 46h procedures for making recommendations within your organisation

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit

### Evidence Requirements (cont)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation
- 3 You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
- 4 You should be able to identify and analyse the needs and expectations of:
  - a existing customers
  - b potential or new customers
- 5 Your evidence of the approach taken by other organisations may relate to competitors or to organisations that provide similar services or products but are not competitors
- 6 The mission, aims, objectives, targets and values of your organisation may be expressed formally or informally

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**UNIT (46)**

**Develop a Customer Service Strategy for an Area**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Assessor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

## **UNIT (47)            Work as a Member of a Team to Deliver Seamless Customer Service**

This Unit has the following elements:

- Element 1 (47.1)        Build effective working relationships with colleagues**
- Element 2 (47.2)        Build effective relationships with service partners**

### **Unit Summary**

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

Excellent customer service is a team effort. You cannot win and maintain the loyalty of customers without pulling together with all the other staff who help to organise the delivery of services or products, interface with the customer or provide back-up to customer service activities. The team probably includes colleagues, senior managers and service partners who are working in other departments or outside organisations but still contribute to customer service delivery.

To achieve your organisation's aims and objectives for customer service you will need to have effective working relationships with all of these — especially when you urgently need their co-operation and support.

### **Key words and phrases for this Unit**

- ◆ work together with service partners
- ◆ communicate with service partners
- ◆ identify and agree team strategies
- ◆ share information and knowledge
- ◆ gather feedback from colleagues
- ◆ review teamwork strategies
- ◆ identify appropriate service partners
- ◆ ensure commitment

## **UNIT (47)            Work as a Member of a Team to Deliver Seamless Customer Service**

### **Element 1 (47.1)        Build effective working relationships with colleagues**

#### **Performance Criteria**

When you work as a member of a team to deliver seamless customer service you must consistently:

- 1     identify and agree with colleagues team strategies for delivering seamless customer service
- 2     share information and knowledge to improve customer service
- 3     encourage, accept and respond positively to feedback from colleagues on customer service performance
- 4     work with colleagues to deal with conflict constructively
- 5     review teamwork strategies for delivering seamless customer service with colleagues



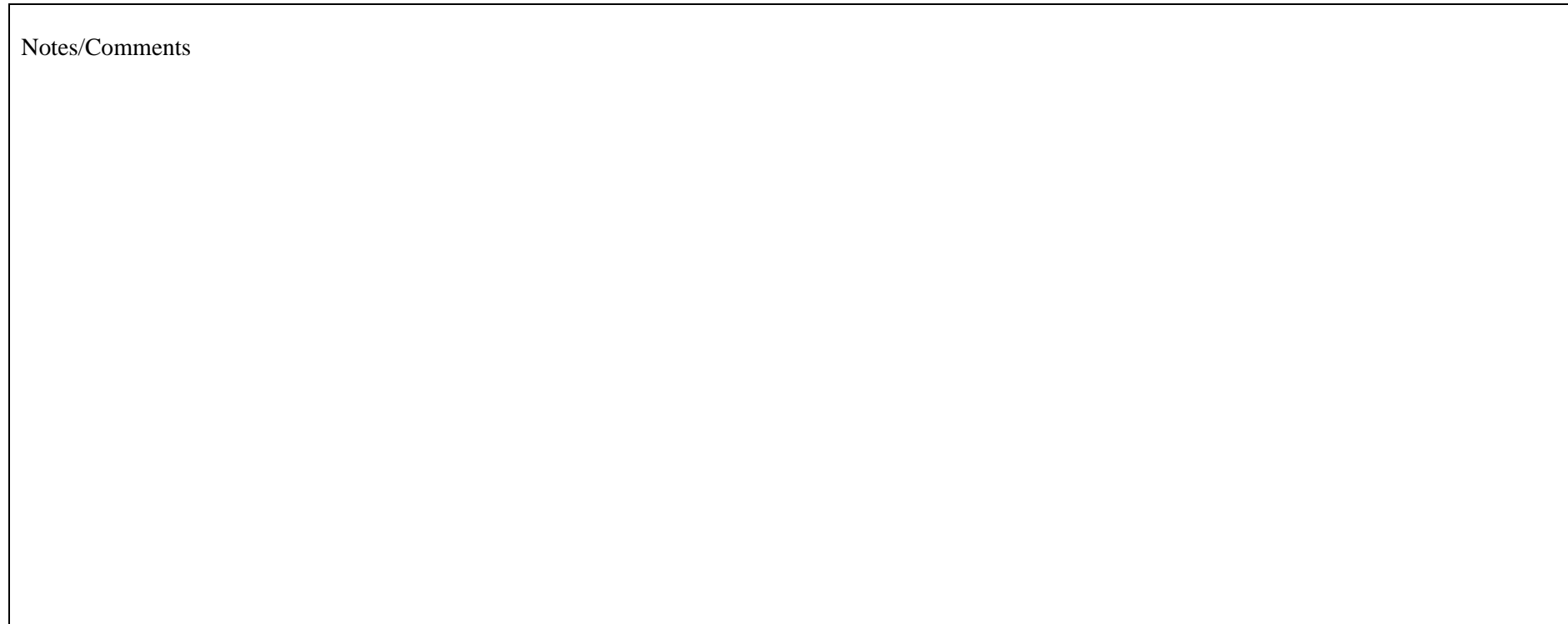
**UNIT (47)**

**Work as a Member of a Team to Deliver Seamless Customer Service**

**Element 1 (47.1)**

**Build effective working relationships with 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 (47)            Work as a Member of a Team to Deliver Seamless Customer Service**

### **Element 2 (47.2)        Build effective relationships with service partners**

#### **Performance Criteria**

When you work as a member of a team to deliver seamless customer service you must consistently:

- 1     identify the service partners who are significant to delivery of seamless customer service
- 2     take opportunities to establish and develop effective working relationships with service partners
- 3     ensure that your commitments to service partners and their commitments to you are being fulfilled as agreed
- 4     communicate clearly and in good time with service partners on issues that affect them and your customers
- 5     work together with service partners to resolve customer service problems
- 6     work together with service partners to deal with conflict constructively

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**UNIT (47)**

**Work as a Member of a Team to Deliver Seamless Customer Service**

**Element 2 (47.2)**

**Build effective relationships with service partners**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Internal Verifier:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## UNIT (47) Work as a Member of a Team to Deliver Seamless Customer Service

### Knowledge and Understanding

To be competent in working as a member of a team to deliver seamless customer service you need to know and understand:

- 47a how to analyse the contribution and roles of colleagues and service partners when delivering customer service
- 47b the types of support you could provide to colleagues and service partners and they could provide to you to deliver seamless customer service
- 47c the benefits and challenges of collaborative working, what may go wrong and how to prepare for this
- 47d the value and importance of effective communication with colleagues and service partners
- 47e the types of behaviours that show you have a relationship of respect and honesty with colleagues and service partners
- 47f how to deal with conflict constructively

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

### Evidence Requirements (cont)

- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must show that you have built relationships with members of your organisation from at least two of these groups of people:
  - (a) front-line staff
  - (b) supervisors or team leaders
  - (c) senior managers
  - (d) colleagues in other departments
  - (e) service partners
- 5 Your evidence must show that you have communicated with team members and service partners using at least two different communication media.

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**UNIT (47)**

**Work as a Member of a Team to Deliver Seamless Customer Service**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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## **UNIT (48)            Manage a Customer Service Award Programme**

This Unit has the following elements:

- Element 1 (48.1)            Review options and plan a customer service award programme**
- Element 2 (48.2)            Implement and manage a customer service award programme**

### **Unit Summary**

This Unit sits within the customer service theme of Development and Improvement. This theme covers activities and approaches that play a vital part in customer service by seeking and implementing.

This Unit is all about the competences involved in managing a customer service award programme.

A customer service award programme can make a valuable contribution to your organisation's customer service strategy. It serves the dual role of motivating team members and displaying to customers your commitment to customer service. Whilst such a programme must be managed like any other management project, its dual purpose means that each management action associated with it must take both aspects into account.

### **Key word or phrases for this Unit**

- ◆ develop an award programme
- ◆ identify benefits and costs of an award programme
- ◆ make a business case for an award programme
- ◆ implement and manage an award programme
- ◆ publicise an award programme
- ◆ organise judging of an award programme
- ◆ announce results of an award programme
- ◆ present awards
- ◆ review and evaluate effects of an award programme

## **UNIT (48)            Manage a Customer Service Award Programme**

### **Element 1 (48.1)       Review options and plan a customer service award programme**

#### **Performance Criteria**

When you manage a customer service award programme you must consistently:

- 1     identify all the possible options for a customer service award scheme drawing on examples inside and outside of your own organisation
- 2     identify the benefits and drawbacks of each option for a customer service award programme
- 3     choose the option for a customer service award programme that best suits your customer satisfaction and team motivation objectives
- 4     plan the details of your chosen customer service award programme
- 5     identify the benefits and costs of your chosen customer service award programme in relation to customer satisfaction and team motivation
- 6     make a business case for the introduction of a customer service award programme or for the development of an existing programme



**UNIT (48)            Manage a Customer Service Award Programme**

**Element 1 (48.1)    Review options and plan a customer service award programme**

Notes/Comments



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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

## **UNIT (48)            Manage a Customer Service Award Programme**

### **Element 2 (48.2)        Implement and manage a customer service award programme**

#### **Performance Criteria**

When you manage a customer service award programme you must consistently:

- 1      launch developments in the customer service award programme in a way that informs and motivates customers and team members
- 2      ensure that the criteria for the customer service awards are transparent and are considered substantially fair by team members
- 3      publicise the customer service award programme to customers in a way that demonstrates organisational commitment to excellent customer service
- 4      organise the judging of individual and team awards in a way that means the results can be justified to the whole team
- 5      announce the results and present the awards in a manner that suits the culture of your organisation and customer service team
- 6      review and evaluate the effects of the customer service award programme on customers and team members

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**UNIT (48)            Manage a Customer Service Award Programme**

**Element 2 (48.2)    Implement and manage a customer service award programme**

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 (48)                    Manage a Customer Service Award Programme

### Knowledge and Understanding

To be competent at managing a customer service award programme you need to know and understand:

- 48a the principles of motivation and, in particular, the importance of recognition as a motivator
- 48b how to make use of customer service award programmes as promotional tools to give added value to customer satisfaction
- 48c the benefits and drawbacks of different rewards associated with award programmes

### Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
- 4 The award programmes used in your evidence may relate to individuals, teams, special projects, trainees, incentive schemes or customer nominated awards.

### Evidence Requirements (cont)

- 5 You must prove that you have planned details of your award programme that include:
  - (a) the criteria for making the award
  - (b) what the award will be
  - (c) the frequency of the award
  - (d) the procedure for judging the award
  - (e) how the award will be presented and publicised
- 6 The business case for the award programme may be made formally or informally.
- 7 Your evidence must show that you have evaluated the customer service award programme from the point of view of:
  - (a) benefits to the organisation
  - (b) benefits to the supervisors and managers of the winners
  - (c) the effect on the winner or winners
  - (d) the effect on others who are not winners

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**UNIT (48)**

**Manage a Customer Service Award Programme**

Notes/Comments

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

**Candidate:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

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**Date:** \_\_\_\_\_

## Glossary of terms

<b>Advisor</b>	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.
<b>Assessment</b>	The process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
<b>Assessor</b>	The person designated in a centre to be responsible for collecting evidence of candidates' competence, judging it and recording achievement.
<b>Authentication</b>	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.
<b>Candidate</b>	The person enrolling for an SQA qualification.
<b>Centre</b>	The college, training organisation or workplace where SQA qualifications are delivered and assessed.
<b>Element of competence</b>	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)
<b>Evidence</b>	materials the candidate has to provide as proof of his or her competence against specified performance criteria.
<b>Evidence requirements</b>	Specify the evidence that must be gathered to show that the candidate has met the standards laid down in the Performance Criteria.
<b>External verifier</b>	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.
<b>Instrument of assessment</b>	A means of generating evidence of the candidate's performance.
<b>Internal verifier</b>	The person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently.
<b>Observation</b>	A means of assessment in which the candidate is observed carrying out tasks that reflect the Performance Criteria given in Outcomes.
<b>Outcome</b>	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).
<b>Performance Criteria</b>	Statements which describe the standard to which candidates must perform the activities which are stated in the Outcome.

<b>Portfolio</b>	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.
<b>Product evaluation</b>	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.
<b>Range/Scope</b>	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)**



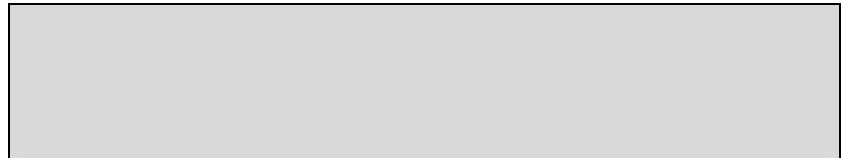
**Voluntary work/interests**



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



**Address**



**Postcode**



**Tel no**



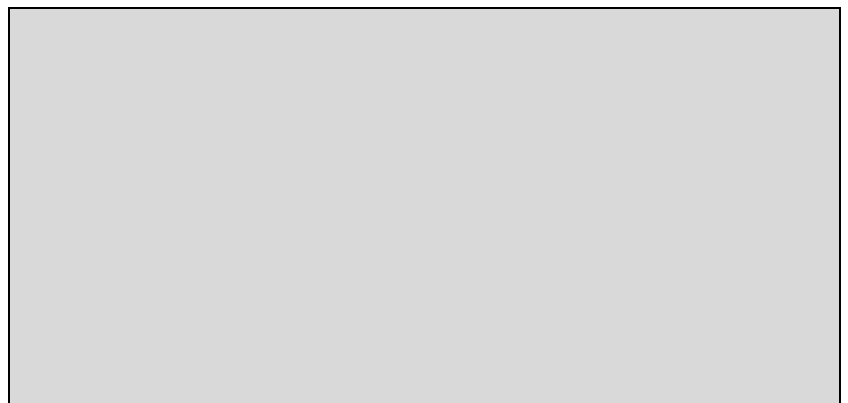
**Type of Business**



**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"/>	

## Index of evidence

SVQ title and level:

Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)

## 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

<b>Unit:</b>	<b>Element(s):</b>
<b>Evidence index number:</b>	
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
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*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 4

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: