



## Higher National Unit specification

### General information

**Unit title:** Customer Care

**Unit code:** H49P 33

**Superclass:** BA

**Publication date:** June 2013

**Source:** Scottish Qualifications Authority

**Version:** 01

### Unit purpose

The purpose of this Unit is to enable learners to develop their customer care skills; to acquire the knowledge to identify areas for improvement in customer care; and understand what is involved in developing a strategy for customer care which can be applied within a chosen organisation. This Unit is appropriate to learners who wish to enhance their customer care skills and knowledge. It is also relevant those already in a customer care role and who have some responsibility for customer care provision.

It may be possible for learners to progress from this Unit to higher level qualifications such as SVQ Customer Care Level 3 or HNC qualifications which include aspects of Customer Care, eg Management and Leadership; Retailing; Hospitality and Tourism, etc.

### Outcomes

On successful completion of the Unit the learner will be able to:

- 1 Identify key aspects of effective customer care.
- 2 Describe the factors which impact on establishing and maintaining effective relationships with customers for an organisation.
- 3 Develop a customer care strategy for an organisation.

### Credit points and level

1 Higher National Unit credit at SCQF level 6: (8 SCQF credit points at SCQF level 6)

## **Higher National Unit Specification: General information (cont)**

**Unit title:** Customer Care

### **Recommended entry to the Unit**

Access to this Unit is at the discretion of the centre although learners should possess good communication and interpersonal skills. Communication to a level of SCQF level 5, Intermediate 2 or equivalent would be beneficial.

### **Core Skills**

Opportunities to develop aspects of Core Skills are highlighted in the Support Notes for this Unit specification.

There is no automatic certification of Core Skills or Core Skill components in this Unit.

### **Context for delivery**

If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

### **Equality and inclusion**

This Unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website [www.sqa.org.uk/assessmentarrangements](http://www.sqa.org.uk/assessmentarrangements).

## Higher National Unit specification: Statement of standards

### Unit title: Customer Care

Acceptable performance in this Unit will be the satisfactory achievement of the standards set out in this part of the Unit specification. All sections of the statement of standards are mandatory and cannot be altered without reference to SQA.

### Outcome 1

Identify key aspects of effective customer care.

#### Knowledge and/or Skills

- ◆ Identification of customers
- ◆ Product and service knowledge
- ◆ Anticipating customer needs
- ◆ Meeting and exceeding customers' needs

### Outcome 2

Describe the factors which impact on establishing and maintaining effective relationships with customers for an organisation.

#### Knowledge and/or Skills

- ◆ Communication skills
- ◆ Use of social media in establishing and maintaining effective customer relations
- ◆ Factors which help maintain effective relationships with customers
- ◆ Impact of excellent, acceptable and poor customer care on an organisation

### Evidence Requirements for Outcomes 1 and 2

Learners will need to provide evidence to demonstrate their Knowledge and/or Skills for Outcomes 1 and 2 by showing that, for an organisation, they can:

- ◆ identify both internal and external customers
- ◆ describe the products and services provided to customers
- ◆ identify how to anticipate customers' needs on two occasions
- ◆ describe how to meet and exceed customers' needs on two occasions
- ◆ describe two examples of the use of social media in building customer relationships
- ◆ communicate with customers using verbal, non-verbal, telephone, written and electronic communication skills, including social media
- ◆ identify three factors which help to maintain customer satisfaction
- ◆ describe two consequences on an organisation of the following:
  - excellent customer care
  - acceptable customer care
  - poor customer care

## **Higher National Unit specification: Statement of standards (cont)**

**Unit title:** Customer Care

### **Outcome 3**

Develop a customer care strategy for an organisation.

#### **Knowledge and/or Skills**

- ◆ Methods of obtaining reliable customer feedback
- ◆ Analysing and evaluating customer feedback
- ◆ Setting standards for customer care
- ◆ Planning a customer care strategy

#### **Evidence Requirements for Outcome 3**

Learners will need to provide evidence to demonstrate their Knowledge and/or skills across all Outcomes by showing that they can:

- ◆ obtain reliable feedback from customers, using three appropriate methods
- ◆ analyse and evaluate the feedback received from customers
- ◆ identify appropriate standards for customer care
- ◆ produce a plan for a customer care strategy, based on the standards identified



## Higher National Unit Support Notes

**Unit title:** Customer Care

Unit Support Notes are offered as guidance and are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

### Guidance on the content and context for this Unit

This Unit may be delivered as part of a Group Award or as a stand-alone Unit and it is important to contextualise the content to make it as relevant as possible to the learners' needs.

The Unit is intended for learners who wish to develop knowledge and understanding of customer care which is a key area of importance in today's competitive world place. It is expressed in generic terms but it should be related to a work context which is familiar to learners.

#### Outcome 1

The key aspects of customer care, ie knowing who your customers are; relevant product and/or service knowledge; and meeting customers' needs. Time should be taken to ensure learners recognise that in today's competitive environment, customers' needs often need to be exceeded rather than just met.

Expectations and needs of both internal and external customers should be considered.

Opportunities should be taken to explore the difference between customer service and customer care when looking at meeting customers' needs.

The need for knowledgeable staff as well as the ways in which staff can gain knowledge of the organisations products and/or services should be discussed.

#### Outcome 2

Explore the importance of establishing and maintaining relationships with customers.

A wide range of types/forms of communication should be covered including face to face; using the telephone; social media; written communication — both traditional and electronic; body language; active listening skills; effective questioning techniques; and the need for empathy.

## Higher National Unit Support Notes (cont)

### Unit title: Customer Care

Learners should be encouraged to explore the use of social media from both an organisational and a customer perspective, such as the information on products and/or services which is now available on popular sites [currently Facebook and Twitter etc], Learners should also look at the opportunities/methods whereby customers comment on an organisation's products and/or services using similar social media. In addition, text messaging is now also used to provide a range of information to customers, eg travel updates, sale events, etc so this should also be included as part of Outcome 2.

Time should be made to consider the impact of excellent, acceptable and poor customer care on an organisation. Learners should be encouraged to define factors which contribute to excellent customer care.

To complete this Outcome, time could be spent looking at how to best deal with difficult customers and also customer complaints.

### Outcome 3

Examine how a customer care strategy is developed. Where possible, learners should look at examples of customer care standards appropriate to their field of study making use of current industry standards, benchmarking and mission statements, etc.

Learners should also explore methods of obtaining and analysing customer feedback, including the use of social media as well as the more traditional methods.

This Outcome looks at feedback in general. It is not only about dealing with complaints but also about identifying areas for improvement and providing solutions. However, it is anticipated that where areas of concern are highlighted via customer feedback, some remedies/actions should be included in the strategy.

Qualitative and quantitative data should be considered as this will help to define the standard of customer care which will be reflected in the content of the plan for a customer care strategy which learners are to produce for an organisation.

## Guidance on approaches to delivery of this Unit

A wide range of techniques can be employed for the delivery of this Unit and, where appropriate, this could include group discussion and role play.

Learners should be encouraged to source findings relating to current standards and organisational policies through use of internet resources.

Examples provided for learners could be in the form of either fictional or real scenarios/case studies.

It is recommended that Outcomes 1 and 2 are assessed holistically. This could be done in a variety of ways eg using restricted response questions and/or a portfolio of evidence produced by the learner. An alternative method of assessment could be a case study with questions. Whichever method used should ensure that all knowledge, skills, and Evidence Requirements are covered.

## Higher National Unit Support Notes (cont)

### Unit title: Customer Care

It is recommended that Outcome 3 could be assessed using a suitable case study or by research into a company/organisation known to the learner.

Alternatively, a single holistic assessment covering all three Outcomes is possible through an investigation by the learner into an organisation chosen by them. But this organisation must be suitable to ensure all Evidence Requirements are covered.

### Guidance on approaches to assessment of this Unit

Assessment for this Unit can take a variety of forms with opportunities to integrate assessments. Evidence could be generated as follows:

- ◆ Two assessments: one integrated assessment for Outcomes 1 and 2 with an assignment for Outcome 3.

This could consist of Outcomes 1 and 2 being assessed holistically using either restricted response questions in open-book conditions (suggested timing of approximately 1–2 hours) or by assessment of learner's portfolio of evidence or through the use of role plays.

Outcome 3 could be assessed by a practical assignment or research into a suitable organisation chosen by the learner.

- ◆ One assessment covering all three Outcomes could take the form of a holistic, single integrated assessment consisting of one of the following:
  - an investigation by learners
  - responses to questions on case study on a real or fictitious organisation
  - responses to questions on a suitable organisation chosen by the learner

Whatever assessment option(s) are selected, the knowledge and skills for each Outcome must be covered and evidence must be generated for all Evidence Requirements.

Evidence can be generated using different types of assessment. The following are suggestions only. There may be other methods that would be more suitable to learners.

- ◆ Assignment on customer care
- ◆ Investigation of customer care in a known organisation
- ◆ Case study
- ◆ Responses to questions — either in written format or orally
- ◆ Role plays

Where instruments of assessment are assignment or investigation, the knowledge and skills must be supported by examples of evidence from the assignment or investigation.

Where evidence is presented orally the assessor should record key words from the learner's response against a checklist detailing the Knowledge and/or Skills required.

## Higher National Unit Support Notes (cont)

**Unit title:** Customer Care

Centres must ensure that evidence submitted for assessment by learners can be authenticated as their own work. There is a wide range of tools that can be used to ensure this including:

- ◆ Questioning — personal, telephone or online interview
- ◆ Written questioning
- ◆ ICT — online conferences, e-mail discussions, password controlled systems, handwriting recognition, computer scanning of facial features, voice prints, finger prints, hand patterns and recognition of key board use
- ◆ Personal logs and personal statements
- ◆ Witness testimony
- ◆ Summative assessment under supervision
- ◆ Recorded evidence
- ◆ Signing and counter-signing of learners work
- ◆ Assessment supervisors — authenticators, invigilators and mentors

More information and guidance on authentication can be found on the SQA website [www.sqa.org.uk](http://www.sqa.org.uk)

Centres are reminded that prior verification of centre-devised assessments would help to ensure that the national standard is being met. Where learners experience a range of assessment methods, this helps them to develop different skills that should be transferable to work or further and higher education.

### Opportunities for e-assessment

E-assessment may be appropriate for some assessments in this Unit. By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or social software. Centres which wish to use e-assessment must ensure that the national standard is applied to all learner evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. The most up-to-date guidance on the use of e-assessment to support SQA's qualifications is available at [www.sqa.org.uk/e-assessment](http://www.sqa.org.uk/e-assessment).

### Opportunities for developing Core and other essential skills

There may be opportunities to gather evidence towards the Core Skills of *Communication*, *ICT* and *Problem Solving* within this Unit, although there is no automatic certification of Core Skills or Core Skills components.

## Higher National Unit Support Notes (cont)

**Unit title:** Customer Care

### Communication

#### Reading at SCQF level 6

Within this Unit, learners may have opportunities to:

- ◆ Read written text which is concerned with the presentation and analysis of aspects of effective customer care within an organisational perspective.
- ◆ Extract, summarise and evaluate text version of customer feedback in the planning and development of a customer care strategy for an organisation.
- ◆ Both identify and summarise significant information, ideas and supporting details regarding customer care, customer service and customer feedback via written communication – including in electronic version.
- ◆ Analyse and evaluate a series of complex articles from a web log (blog) or social media and extract relevant information which may impact on customer service and/or customer care at work.

#### Writing at SCQF level 6

Where the learner produces work and assessment evidence in written format for this Unit, they could have opportunities to produce well-structure written communications on complex customer care topics. This could include:

- ◆ Production of written communication which presents, analyses, and evaluates a substantial body of information on customer care, including the planning and development of a customer care strategy for an organisation.
- ◆ Using a structured written response, provide identification of key aspects of good customer care and describe the importance of establishing and maintaining effective relationships with customers for an organisation — making clear distinctions between facts, opinions, arguments, etc.
- ◆ In written format or using social media for customer care, learners have to use word choice, spelling, vocabulary etc which are appropriate to the content and context of the organisation and meet the relevant customer care purposes eg information about products and/or services; obtaining customer feedback, etc.

#### Oral Communication at SCQF level 6

In this Unit, learners may have opportunities to produce and respond to oral communication in complex customer care contexts. In either face to face or telephone situations, they have to:

- ◆ Use vocabulary, register and a range of spoken language structures consistently and effectively at an appropriate level of formality for both establishing and maintaining effective customer care and relationships and when dealing with difficult customers; outlining complex product and/or service knowledge; etc.
- ◆ Convey all essential information, opinions, or ideas with supporting detail accurately and coherently, and with varied emphasis as appropriate eg when dealing with customer concerns; outlining complex products and/or services of an organisation, etc.

## Higher National Unit Support Notes (cont)

### Unit title: Customer Care

- ◆ Integrate the use of formal language and non-verbal conventions, with conscious variation in tone, pace, and modulation adjusted to individual customer needs. In face to face situations with customers, skilled use will be made of eye contact, posture, and gesture, etc
- ◆ Respond to customers as appropriate — eg dealing with customer concerns by listening; answering questions; asking questions to clarify or explore responses in greater depth; analysing; summarising; expanding, reflecting on or synthesising the points of view expressed.

### Information and Communication Technology (ICT)

In this Unit, learners will have opportunities to use *ICT* independently, effectively, and responsibly to access, provide and create information within a range of tasks related to customer care, customer service and producing a customer care strategy.

#### Accessing Information at SCQF level 5

This could include:

- ◆ Carrying out searches for information on relevant organisations and customer service aspects using a range of electronic sources. This should take account of time, cost, effective filtering of information, etc.
- ◆ Evaluate results of the search using criteria given by tutors/assessors.

#### Providing/Creating Information at SCQF level 5

This could include:

- ◆ Evaluation of information using given criteria for development of a customer care strategy.
- ◆ Preparing information for use on appropriate social media sites for customers on an organisation's complex products and/or services.
- ◆ Use of social media sites for obtaining customer feedback.
- ◆ Presenting findings in an appropriate ICT format eg aspects of customer care; establishing and maintaining effective customer relationships, etc.

## Higher National Unit Support Notes (cont)

**Unit title:** Customer Care

### Problem Solving

#### Analyse a complex situation or issue at SCQF level 6

Within this Unit, learners will have many opportunities to develop the skills involved in analysing complex customer care issues and situations such as:

- ◆ Identify key factors involved in:
  - effective customer care
  - establishing and developing effective customer relationships
  - dealing with customer feedback, including complaints
- ◆ Assess the relevance of these factors to particular customer care situations or issues.
- ◆ Research and justify an approach to the development of a customer care strategy for an organisation.

#### Planning and Organising at SCQF level 5

Learners have to plan, organise, and complete several tasks in order to obtain this Unit. In particular this involves the researching, planning, organising and producing a customer care strategy for an organisation. The learners have to identify and obtain the necessary resources and information which will involve searches and the use of customer feedback.

Learners must also decide how this task will be managed and carry it out.

## History of changes to Unit

Version	Description of change	Date

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## General information for learners

### Unit title: Customer Care

This section will help you decide whether this is the Unit for you by explaining what the Unit is about, what you should know or be able to do before you start, what you will need to do during the Unit and opportunities for further learning and employment.

This Unit is designed to enable you to recognise and develop effective customer care skills within a work environment. This could be an organisation known to you or an investigation into customer care provision within another organisation chosen by you; a case study organisation (either real or fictitious), etc. This Unit will help develop your knowledge and understanding of customer care which is vital to every aspect of successful business operations. On successful completion of the Unit you will be able to:

- ◆ identify key aspects of effective customer care
- ◆ describe the factors which impact on establishing and maintaining effective relationships with customers for an organisation
- ◆ develop a customer care strategy for an organisation

The Unit is made up of three Outcomes:

**Outcome 1** covers the key aspects of customer care — knowing your customers, knowing the product or services you are providing and the importance of meeting customer needs. You will also identify and explore the importance of internal and external customers.

**Outcome 2** explores the importance of establishing and maintaining effective relationships with customers. The focus is on the various communication methods which are used to develop effective relationships with customers, both traditional methods and the use of social media.

**Outcome 3** gives you the opportunity to develop a plan for a customer care strategy, based on the analysis of customer feedback on an organisation.

In order to complete this Unit successfully you will be required to achieve a satisfactory level of performance which covers all the skills and knowledge for each Outcome. Assessment of this Unit could take a variety of forms such as:

- ◆ Two separate assessments — one covering Outcomes 1 and 2 which could be under the supervision of your tutor/assessor; the second one covering Outcome 3 could take the form of an assignment where you are provided with information which you use to develop a customer care strategy.
- ◆ One single overall assessment of an investigation into customer care within an organisation.

Your tutor/assessor will provide you with exact details of the assessment(s) for this Unit.

## General information for learners (cont)

**Unit title:** Customer Care

There are opportunities to develop Core Skills in this Unit as follows:

- ◆ *Communications* — Reading; Writing and Oral at SCQF level 6
- ◆ *ICT* — Accessing information and Providing/Creating information at SCQF level 5
- ◆ *Problem Solving* — Analysing at SCQF level 6 and Planning and Organising at SCQF level 5.

Hope that you enjoy this Unit on Customer Care.