

NextGen: HN unit specification

Creating a Culture of Customer Care (SCQF level 7)

Unit code: J9GD 47

SCQF level: 7 (8 SCQF credit points)

Valid from: August 2026

This unit specification provides detailed information about the unit to ensure consistent and transparent assessment year on year. It is for lecturers and assessors, and contains all the mandatory information you need to deliver and assess the unit.

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Unit purpose

This unit provides learners with knowledge and understanding to recognise and evaluate effective customer care in a customer service environment. Learners analyse factors affecting customer care and judge the effectiveness of a customer care strategy by applying them to the workplace. The unit emphasises the importance of customer care, its value to organisations, and how it is critical to employees' work.

It is suitable for learners working in, or interested in, customer service in all types and sizes of organisations, including public and private organisations, and those operating in different markets and environments, for example online.

Learners do not need to have prior direct operational experience of customer service.

Entry to the unit is at your centre's discretion. Before they start the unit, we recommend learners have good communication skills. They could show this by having one or more of the following:

- Core Skill Communication at SCQF level 6
- other equivalent qualification

You can deliver this unit as part of a Higher National Certificate (HNC) or Higher National Diploma (HND). Learners can study this unit as a stand-alone unit when it is contextualised to a specific discipline.

Unit outcomes

Learners who complete this unit can:

1. analyse factors contributing to a culture of customer care
2. evaluate the customer care strategy of an organisation

Evidence requirements

Learners must produce evidence to show they can:

- analyse factors that contribute to a culture of customer care
- use these factors to evaluate the customer care strategy of a real or hypothetical organisation or work situation

Outcome 1

Learners' analysis must:

- be based on recognised customer care principles
- include valid and convincing reasons that highlight the importance of the following aspects of customer care:
 - identifying and meeting the expectations of key customers
 - dealing with two different types of customer care problems
 - maintaining customer aftercare
 - gathering qualitative and quantitative customer feedback
 - monitoring customer feedback

Outcome 2

Learners' evaluation must:

- refer to recognised customer care principles and apply them in the context of a specific organisation
- include two judgements that are based on valid and convincing reasons, include examples from the organisation, and reach a clear conclusion:
 - one on the suitability of customer care standards set by the organisation
 - one on the effectiveness and efficiency of the organisation's customer care strategy
- propose ways to continuously improve the organisation's customer care that:
 - consider the conclusions from the judgements
 - are realistic and achievable

Knowledge and skills

Knowledge	Skills
<p>Outcome 1</p> <p>Learners should understand how to:</p> <ul style="list-style-type: none">• meet customer expectations• deal with customer care problems• carry out customer aftercare• gather and monitor qualitative and quantitative customer feedback	<p>Outcome 1</p> <p>Learners can:</p> <ul style="list-style-type: none">• analyse a customer care strategy
<p>Outcome 2</p> <p>Learners should understand:</p> <ul style="list-style-type: none">• customer care standards• how to continuously improve customer care	<p>Outcome 2</p> <p>Learners can:</p> <ul style="list-style-type: none">• evaluate a customer care strategy• propose ways to continuously improve an organisation's customer care

Meta-skills

You must give learners opportunities to develop their meta-skills throughout this unit. We have suggested how to incorporate the most relevant ones into the unit content, but you may find other opportunities.

Self-management

This includes focusing, integrity, adapting and initiative. The most relevant are:

- focusing:
 - analysing and interpreting data and factual information
- integrity:
 - understanding customer care standards
- adapting:
 - adjusting strategies based on customer feedback and customer care knowledge and understanding
- initiative:
 - working independently to analyse customer care strategies and identify areas for improving customer care

Social intelligence

This includes communicating, feeling, collaborating and leading. The most relevant are:

- communicating:
 - receiving and conveying a wide range of information
 - researching complex issues and filtering the relevant information

- feeling:
 - understanding the expectations of customers and the factors that make customers feel cared for and satisfied
- leading:
 - taking ownership of their learning to plan and completing all assessments

Innovation

This includes curiosity, creativity, sense-making and critical thinking. The most relevant are:

- curiosity:
 - investigating and analysing new and unfamiliar data and information
- creativity:
 - exploring ideas and producing solutions, such as how to continuously improve customer care
- sense-making:
 - connecting qualitative and quantitative feedback to the factors that contribute to a culture of customer care
 - understanding customer care problems
- critical thinking:
 - analysing the factors necessary for create a successful customer care strategy

Literacies

This unit provides opportunities to develop the following literacies.

Numeracy

Learners develop numeracy skills by:

- analysing quantitative data

Communication

Learners improve their communication skills by:

- exploring different types of communication used in customer contact, including active listening skills
- writing or presenting coherent analysis and evaluations
- receiving and conveying a wide range of information
- researching complex issues and filtering the relevant information

Digital

Learners improve their digital literacy skills by:

- using software to research, plan and present assessment evidence
- creating presentations

Learning for Sustainability

Throughout this unit, you should encourage learners to develop their skills, knowledge and understanding of sustainability.

This includes:

- a general understanding of social, economic and environmental sustainability
- a general understanding of the United Nations Sustainable Development Goals (SDGs)
- a deeper understanding of subject-specific sustainability
- the confidence to apply the skills, knowledge, understanding and values they develop in the next stage of their life

Delivery of unit

You can deliver this unit:

- as part of a course where customer service is relevant
- as a stand-alone unit when it is contextualised in other subject areas

The notional time for delivery and assessment is 40 hours. The amount of time you allocate to each outcome is at your discretion.

Additional guidance

The guidance in this section is not mandatory.

Content and context for this unit

This unit provides learners with knowledge and understanding to recognise and evaluate customer care in a relevant work environment. If learners are employed, they can apply their analysis to real work situations.

The unit highlights:

- the crucial role of customer service in organisations
- the role that employees throughout organisations can play in developing and maintaining a culture that aims to meet the needs and expectations of all customers, both internal and external

Learners do not need to have direct operational experience of customer service. Those with this experience can reflect on it during the unit.

Throughout the unit, you should emphasise how to apply customer care ideas and theories to the workplace.

Outcome 1 content

Outcome 1 covers the principles of customer service. It focuses on the impact that these principles can have on an organisation, as well as what makes the difference between acceptable service and excellent service.

Learners can consider internal and external customers, and explore the distinction between customer service and customer care.

Key principles of customer care

- **Knowing your customers.**
- **Meeting and exceeding your customers' needs.**
- **Creating and building customer loyalty through customer satisfaction**
- **Establishing relationships and building rapport with customers.** Learners investigate this by exploring different types of communication used in customer contact, for example:
 - in person
 - telephone
 - written communication — both traditional and electronic
 - body language
 - active listening skills
 - effective questioning techniques
 - discussing the need for and benefit of empathy
- **Knowledgeable employees** — including how they can develop knowledge of the organisation's products and/or services
- **Customer satisfaction, and when and how customer loyalty can be established.** It can be useful to examine the difference between customer satisfaction and customer loyalty.

Gathering and monitoring feedback

Learners review methods of gathering feedback and the different types of feedback, for example qualitative and quantitative. This could cover:

- various types of customer surveys (either carried out by the organisation or by others)
- recording of customer complaints
- data on behaviour such as return customers
- results from mystery shoppers

Monitoring feedback can include ways of storing and using feedback, and incorporate the increasing role that technology plays in actively improving customer care.

Comparing examples of customer care

Learners can:

- compare and contrast examples of customer care where both management and their employees have implemented their organisation's customer care policies, and where they have not
- review the differences and conclude what the benefits are by examining a range of customer care problems and considering appropriate methods of aftercare

Outcome 2 content

Outcome 2 applies the principles examined in outcome 1. Learners look at how to continuously improve customer care standards in a real or hypothetical organisation or work situation.

Where possible, learners should use:

- current industry standards
- mission and vision statements
- benchmarking or levelling of appropriate standards

Approaches to delivery

You can deliver the unit by facilitating discussion:

- in a traditional in-person environment
- online
- by combining in-person and online support using platforms such as Teams or Zoom

Your delivery method should incorporate learning and teaching approaches that help learners to produce assessment evidence as they work through the unit.

Learners can produce evidence in many ways, including:

- individual presentations
- role play
- debate and discussion
- answering questions about knowledge and/or skills, or a case study
- investigative reports on an organisation of their or your choosing
- assignments, for example case-study based
- using technology, for example digital platforms such as Teams, Zoom, Moodle, e-portfolios

All these methods link learning and teaching directly with producing assessment evidence.

You could also:

- encourage learners to keep a learning diary or screenshot information researched online or from social media platforms
- give learners guidance on how to structure and organise their material so they can easily present it for assessment purposes (either electronically or paper based)

You can use real-world examples to illustrate the key principles that underpin excellent customer service, and encourage learners to draw on their own experiences as customers and relate these to their experiences of working in organisations.

Learners could share information on their experiences in an online discussion or debate, and in a class group. They could develop this further, for example by giving a short presentation to a class group or an online presentation.

You should encourage learners to:

- apply the principles of customer service to real situations and draw conclusions from this
- consider the efficiency and effectiveness of customer service, ways in which customer service can be improved, and how any improvements can be maintained and further extended.

As part of the delivery process, once learners are familiar with the principles of good customer service, you can ask them to create a customer service strategy for an organisation. They can choose a real or hypothetical organisation and work individually, in pairs or in small groups.

Learners can use this customer service strategy as the basis for gathering assessment evidence for outcome 2. In this way, delivery and assessment are closely linked.

Approaches to assessment

This unit lends itself to holistic assessment. The two outcomes and their associated knowledge and skills are very closely linked. Learners' analysis of the factors that contribute to a culture of customer care (outcome 1) can provide the basis for their evaluation of a customer care strategy (outcome 2).

Assessing outcomes 1 and 2 together

We recommend you assess both outcomes together.

In outcome 2, learners evaluate an organisation's customer care strategy. This can be for an organisation as a whole or any part of it.

Learners in employment can use their own area of work if they wish, and if it allows them to produce suitable and sufficient evidence. Or they could work with case study material that refers to one or more organisations.

The organisations can be real or hypothetical. It is possible for learners to produce evidence in both types of situations. They could, for example, base their analysis on a real organisation but evaluate a customer care strategy based on a hypothetical organisation. The hypothetical customer care strategy they use could be one they have previously helped create.

Learners can produce evidence in different ways. You should encourage them to produce evidence in a format that suits their situation.

Producing evidence during the delivery

Learners can produce evidence during the delivery of the unit and gather it together in a e-portfolio or paper-based portfolio. Suitable portfolio evidence includes:

- personal statements and/or responses to questions relating to the knowledge and/or skills for each outcome
- online research into customer service in an organisation (chosen by you or the learner)
- an investigative report into customer service in an organisation (chosen by you or the learner)

Learners can produce portfolio evidence from activities that form part of their learning and teaching, their workplace or other sources such as a case study.

Producing evidence towards the end of the unit

Learners can produce evidence towards the end of the unit — again, you can use an assessment method designed to produce evidence for both outcomes. For example, learners could produce a narrative report that:

- evaluates a customer care strategy
- uses factors that contribute to good customer service to justify and support their evaluation

Learners can base the report on their workplace, or on a case study about a real or hypothetical situation.

To help make sure their report meets all the evidence requirements, you can give learners a set of questions or headings to help them structure it.

Learners can present their work in a traditional report format, but they do not have to. They could, for example, organise their evidence in a slide presentation that includes video and audio.

Assessing outcomes 1 and 2 separately

You can also assess outcomes 1 and 2 separately. This can be a suitable approach if learners are new to customer service and need time to assimilate the principles underpinning excellent customer care and the factors that contribute to a customer care culture. In these circumstances, you can assess:

- outcome 1: by responses to a series of questions that cover all the knowledge and/or skills
- outcome 2: by responses to questions, possibly linked to a case study of an organisation (again, there is a range of available formats; for example, learners could present their responses in an investigative report)

Equality and inclusion

This unit is designed to be as fair and as accessible as possible with no unnecessary barriers to learning or assessment.

You must consider the needs of individual learners when planning learning experiences, selecting assessment methods or considering alternative evidence.

Guidance on assessment arrangements for disabled learners and those with additional support needs is available on the [assessment arrangements web page](#).

Information for learners

Creating a Culture of Customer Care (SCQF level 7)

This information explains:

- what the unit is about
- what you should know or be able to do before you start
- what you need to do during the unit

Unit information

This unit provides you with knowledge and understanding to recognise and evaluate effective customer care in a work environment. You analyse factors affecting customer care and judge the effectiveness of a customer care strategy by applying them to a given workplace. The unit emphasises the importance of customer care, its value to organisations, and how it is critical to employees' work.

Before you start the unit, it would be useful for you to have good communication skills. You could show this by having one or more of the following:

- Core Skill Communication at SCQF level 6
- other equivalent qualification

The unit has two outcomes:

- In outcome 1, you analyse factors that contribute to a culture of customer care and learn about the main principles that underpin high standards of customer care.
- In outcome 2, you apply these principles to an organisation or part of an organisation and evaluate its customer care strategy.

You can focus your study on organisations and examples relevant to you. There is the flexibility to study, as appropriate, organisations of different types and sizes,

including public and private organisations, and those operating in different markets, for example online.

To successfully complete the unit, you produce evidence that shows you can analyse the factors contributing to a culture of customer care, and use these to evaluate the customer care strategy of an organisation — possibly one that you know well. This gives you the chance to demonstrate the customer service concepts and principles that you have learned during the unit.

You can present this evidence in a variety of ways, such as answers to questions, responses to questions relating to a case study or an investigative report.

Meta-skills

Throughout this unit, you develop meta-skills that are useful for the customer service sector.

Meta-skills are transferable behaviours and abilities that help you adapt and succeed in life, study and work. There are three categories of meta-skills: self-management, social intelligence and innovation.

Self-management

This meta-skill includes focusing, integrity, adapting and initiative. You:

- analyse and interpret data and factual information
- understand customer care standards
- adjust strategies based on customer feedback and customer care knowledge and understanding
- work independently to analyse customer care strategies and identify areas for improving customer care

Social intelligence

This meta-skill includes communicating, feeling and leading. You:

- receive and convey a wide range of information
- research complex issues and filter the relevant information
- understand the expectations of customers and the factors that make customers feel cared for and satisfied
- take ownership of your learning to plan and complete all assessments

Innovation

This meta-skill includes curiosity, creativity, sense-making and critical thinking. You:

- investigate and analyse new and unfamiliar data and information
- explore ideas and producing solutions, such as how to continuously improve customer care
- connect qualitative and quantitative feedback to the factors that contribute to a culture of customer care
- understand customer care problems
- analyse the factors necessary for create a successful customer care strategy

Learning for Sustainability

Throughout this unit, you develop skills, knowledge and understanding of sustainability.

You learn about social, economic and environmental sustainability principles and how they relate to the customer service sector. You also develop an understanding of the [United Nations Sustainable Development Goals](#).

Administrative information

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Superclass: BA

History of changes

Version	Description of change	Date

Please check [our website](#) to ensure you are using the most up-to-date version of this unit.

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