



Qualification handbook

BIIAB Level 2 Diploma in Customer Service

QN 601/3734/4

QW C00/0645/5

Version 1.4

Table of Contents

1. About the BIIAB Level 2 Diploma in Customer Service	1
2. About this pack	1
3. BIIAB Customer Service	2
4. What are Rules of Combination (ROC)?.....	2
5. BIIAB Level 2 Diploma in Customer Service Rules of Combination (ROC) and structure	3
6. Age Restriction.....	5
7. Entry Requirements and Progression	5
8. Assessment	5
9. Initial Assessment and Induction	10
10. Delivery.....	11
11. Resources.....	11
12. Design and delivery	13
13. Format of Units	14
14. Initial registration.....	15
15. Mandatory Units	16

Version and date	Change, alteration or addition	Section
1.3 December 2015	Minimum GLH	Rules of Combination
	Assessment method for B&A39	Rules of Combination
Version 1.4 January 2018	Updated through to remove reference to "QCF"	
	RoC updated with TQT figures	Rules of Combination

1. About the BIIAB Level 2 Diploma in Customer Service

BIIAB Level 2 Diploma in Customer Service

This qualification has been developed by Skills CFA in conjunction with employers. BIIAB has designed the delivery mechanisms, assessment strategy and assessments in conjunction with employers and centres. The qualification has a unique Qualification Number (QN) which is shown below.

Each unit within the qualification will also have a Unit Reference Number (URN).

The QN code will be displayed on the final certificate for the qualification.

Qualification title	Qualification Number (QN)
BIIAB Level 2 Diploma in Customer Service	601/3734/4 C00/0645/5

The BIIAB Level 2 Diploma in Customer Service has been designed to allow learners to obtain and then demonstrate the skills and knowledge to work at an operational level in the Customer Service, with some autonomy and some supervision.

It is also a key component part of the Skills CFA Intermediate Level Apprenticeship Framework in Customer Service.

2. About this pack

This support pack has been developed to provide guidance for learners, assessors and verifiers undertaking, delivering, or quality assuring this qualification.

The purpose of the support pack is to provide the majority of the key information that may be needed to prepare for, and help support, the successful delivery of the qualification, in one place.

If this pack is updated, centres will be notified via the BIIAB monthly newsletter which goes to approved centres.

3. BIIAB Customer Service

BIIAB is committed to giving the highest possible levels of customer service. The BIIAB's Service Level Agreement is available via www.biiab.org

Our Customer Service team can be contacted between the hours of 0900 and 1700 Monday to Friday by using the contact details below, or outside those hours, by leaving a message on our voicemail service.

Customer Service Contact Details: 01276 684449

Email: customersupport@bii.org

Our Customer Service team will be happy to assist with any administration-related enquiries you may have. For example:

- registration and certification enquiries
- re-certification issues
- Centres available in the local area
- appeals
- whistleblowing.

4. What are Rules of Combination (ROC)?

Under the Regulatory Framework qualifications can be made up of a combination of mandatory and/or optional units. The units and credits required to complete a qualification are set out by the rules of combination (RoC). The RoC allows for flexibility and transferability.

The ROC will specify:

- The total credit value of the qualification
- The amount of credit that must be achieved within specific groupings of units (e.g. Mandatory, Optional Unit, and Optional groups)
- The minimum credit which must be achieved at the level or above the level of the qualification
- The Total Qualification Time (TQT)
- The title, Unit Regulation Number and BIIAB Unit number for each unit, alongside its level, credit, and Guided Learning Hours (GLH)
- Any barred units (units that cannot be taken together as part of the qualification).

When choosing the appropriate route for a learner or group of learners, it is the responsibility of the centre to ensure the rules of combination are adhered to.

5. BIIAB Level 2 Diploma in Customer Service Rules of Combination (ROC) and structure

To achieve the BIIAB Level 2 Diploma in Customer Service learners **must** gain a **total of 45** credits. This **must** consist of:

- **Minimum total** unit credit: **45**
- Mandatory group A **minimum** credit: **19**
- Optional groups B, C and D **minimum** credit: **26**. This **must** consist of:
 - Optional group B **minimum** credit: **3**
 - Optional group C **minimum** credit: **16**
 - Optional group D a **maximum** credit of: **7**
- GLH: **254**
- TQT: **450**

The qualification has been developed based upon industry feedback as to the fundamental knowledge and skills required to work in the sector at the level.

Listed below are the qualification units.

Mandatory Group A

Unit no	URN	Unit Title	Credit	Level	GLH	Assessment method
CS 7	A/506/2130	Deliver customer service	5	2	27	Portfolio
CS 8	F/506/2131	Understand customers	2	2	17	Assessment Knowledge Module (AKM)
CS 9	J/506/2132	Principles of customer service	4	2	34	Assessment Knowledge Module (AKM)
B&A 38	A/506/1964	Understand employer organisations	4	2	40	Assessment Knowledge Module (AKM)
M&L 1	L/506/1788	Manage personal performance and development	4	2	18	Portfolio

Optional Group B

Unit no	URN	Unit Title	Credit	Level	GLH	Assessment method
CS 5	D/506/2119	Communicate verbally with customers	3	2	14	Portfolio
CS 6	T/506/2126	Communicate with customers in writing	3	2	20	Portfolio

BIIAB Level 2 Diploma in Customer Service



Optional Group C

Unit no	URN	Unit Title	Credit	Level	GLH	Assessment method
CS 10	H/506/2154	Deal with incoming telephone calls from customers	3	2	16	Portfolio
CS 11	K/506/2155	Make telephone calls to customers	3	2	16	Portfolio
CS 12	L/506/2133	Promote additional products and/or services to customers	2	2	14	Portfolio
CS 13	R/506/2134	Process information about customers	3	2	14	Portfolio
CS 14	Y/506/2135	Exceed customer expectations	3	2	15	Portfolio
CS 15	T/506/2143	Deliver customer service whilst working on customers' premises	4	2	20	Portfolio
CS 16	T/506/2157	Carry out customer service handovers	3	2	15	Portfolio
CS 17	A/506/2158	Resolve customer service problems	5	2	22	Portfolio
CS 18	F/506/2159	Deliver customer service to challenging customers	3	2	16	Portfolio
CS 19	Y/506/2149	Develop customer relationships	3	2	18	Portfolio
CS 20	T/506/2160	Support customer service improvements	3	2	12	Portfolio
CS 21	A/506/2161	Support customers through real-time online customer service	3	2	15	Portfolio
CS 22	H/506/2977	Support customers using self-service equipment	3	2	18	Portfolio
CS 23	J/506/2163	Use social media to deliver customer service	3	2	18	Portfolio
CS 24	K/506/2978	Provide post-transaction customer service	5	2	22	Portfolio
CS 31	R/506/2151	Resolve customers' complaints	4	3	22	Portfolio
CS 32	D/506/2170	Gather, analyse and interpret customer feedback	5	3	24	Portfolio

Optional Group D

Unit no	URN	Unit Title	Credit	Level	GLH	Assessment method
CFAQ3	T/505/4673	Health and safety procedures in the workplace	2	2	16	Portfolio
B&A 13	L/506/1807	Manage diary systems	2	2	12	Portfolio
B&A 19	H/506/1814	Provide reception services	3	2	15	Portfolio
B&A 27	L/506/1869	Contribute to the organisation of an event	3	2	23	Portfolio
B&A 35	M/506/1895	Buddy a colleague to develop their skills	3	2	19	Portfolio
B&A 39	L/506/1905	Employee rights and responsibilities	2	2	16	Assessment Knowledge Module (AKM)
M&L 2	R/506/1789	Develop working relationships with colleagues	3	2	19	Portfolio
M&L 7	J/506/1806	Principles of equality and diversity in the workplace	2	2	10	Assessment Knowledge Module (AKM)
CFAQ4	M/502/8587	Processing sales orders	2	2	17	Portfolio
CFAQ5	R/502/8601	Meeting customers' after sales needs	3	2	14	Portfolio
CFAQ6	M/502/8606	Handling objections and closing sales	3	2	22	Portfolio
CC38	K/503/0421	Deal with incidents through a contact centre	7	2	40	Portfolio
CC19	L/503/0394	Carry out direct sales activities in a contact centre	5	2	15	Portfolio
B&A 42	H/506/1912	Negotiate in a business environment	4	3	18	Portfolio
CFAQ9	F/502/4396	Bespoke Software	3	2	20	Portfolio

6. Age Restriction

This qualification is appropriate for use in the following age ranges:

- 16-18
- 19+.

7. Entry Requirements and Progression

There are no entry requirements for this qualification. However, learners must be assessed to ensure they have a reasonable chance of achievement and will be able to generate the required evidence.

The qualification is designed to equip learners with the knowledge and skills to work effectively in the Customer Service sector. It also will allow for a number of progression routes into Level 3 qualifications, to employment or into other areas of learning.

Achievement of the qualification offers opportunities for progression, including:

- BIIAB Level 3 Diploma in Customer Service
- BIIAB Level 2 Certificate in Contact Centre Operations
- BIIAB Level 3 Diploma in Management
- Career progression.

8. Assessment

Overview of assessment strategy

The qualification contains a mixture of competence and knowledge units. These units are respectively assessed by both Portfolio and by Assessment Knowledge Modules (AKMs) externally set by the BIIAB. The AKMs are internally marked assessments, containing a series of questions, marked and internally verified by the centre and with external verification by the BIIAB External Quality Assurer (EQA). Competence units are assessed following NVQ principles.

Assessments provided by BIIAB will ensure that effective learning has taken place and that learners have the opportunity to:

- Meet the assessment criteria
- Achieve the learning outcomes.

Assessment process

Assessment is the process used to judge the competence, of a learner, against set standards.

The assessor is the person who is responsible for determining learners' competence. The assessor may be a work place supervisor or an external person who is trained and qualified, or working towards a qualification relevant to the assessor role.

Assessors base their judgement on performance and decide how it compares to the national standard. The assessor will also ask questions based on the knowledge required to do the work, to ascertain the knowledge and understanding of the learner.

When the required units have been completed and the assessor is satisfied that the learner has met the national standard, a recommendation for a certificate will be made.

An Internal Quality Assurer (IQA) is responsible for the quality assurance of the qualifications within the training organisation and will provide advice, guidance and support to the assessors. IQAs also ensure that the assessors apply the standards consistently and fairly. The IQA will see review the portfolio of evidence during the assessment process.

An External Quality Assurer (EQA), who is appointed by BIIAB, will verify the assessment and internal verification decisions involved in the development of the portfolio. The EQA will quality assure the qualification process, which ensures that certification of the qualification is reliable, consistent and to the national standard, by checking the consistency of assessments made by the training provider, and across training providers.

Assessment Strategy

All assessment must adhere to the current Skills CFA assessment strategy for this qualification.

The assessment strategy for this qualification can be seen in the section which follows and it provides details of the key requirements for the qualification and the assessor, verifiers delivering, quality assuring and certificating the qualification. Centres should also refer to the full strategy available at www.skillsca.org.

Skills CFA assessment strategy

Requirements of assessors, external and internal verifiers

Candidates may be assessed, moderated or verified at work either by one or several appointed individuals.

Assessors - The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates. To be able to assess candidates, assessors **must**:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications **must** be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any assessors working towards an appropriate qualification **must** ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.
- be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed, or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.
- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process. It is the responsibility of approved centres to select and appoint assessors.

Internal Quality Assurer (IQA) - A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA's.

IQAs must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications **must** be able to demonstrate that they are verifying to the current standards

OR

BIIAB Level 2 Diploma in Customer Service



- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, his/her decisions **must** be countersigned by a suitably qualified IQA and should be supported by a qualified IQA throughout the training period.
- be 'occupationally competent'. IQAs **must** demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business.
- demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

External Quality Assurer (EQA) - The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs **must** have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs **must**:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications **must** be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions **must** be countersigned by a suitably qualified EQA and should be supported by a qualified EQA throughout their training period.
- be 'occupationally competent'. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business.
- demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process. It is the responsibility of the awarding organisation to select and appoint EQAs.

Skills CFA and awarding organisations require all assessors, moderators and verifiers to maintain current Customer Service competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information **must** be formally recorded in individual CPD records that are maintained in assessment centres.

Evidence from Workplace Performance

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the competence units.

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors **must** ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

Assessment of the Knowledge Units

When assessing the knowledge and understanding based unit, it is important that the chosen assessment methodology is appropriate to this and is accurately recorded.

Assessment methodologies that are appropriate for the knowledge and understanding units include:

- Professional discussion
- Learner reflective accounts
- Question and Answer
- Assignments and Projects.

These **must** be planned, assessed and verified by centres, using approved and robust systems and procedures.

Assessors and IQAs **must** ensure that they are able to demonstrate their own CPD and competence across the units being delivered and assessed, because of the nature of the theoretical content that has to be covered.

Particular attention must be paid to units which permit learners to use their places of study or research of organisations in order to achieve the unit, and those which can only be achieved if the learner is in current employment, or there is recognition of prior learning from extensive experience in that particular occupational sector.

Simulation

- Simulation can be applied to all units listed in Appendix B of the full Skills CFA assessment strategy.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE **must** provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A of the full Skills CFA assessment strategy.

Appeals

If learners are dissatisfied with an assessment outcome, they have the right to appeal. The main reasons for an appeal are likely to be:

- Learners do **not** understand why they are **not** yet regarded as competent, because of unsatisfactory feedback from the assessor
- Learners believe they are competent and that the assessor has misjudged them, or has failed to utilise some vital evidence.

BIIAB expects most appeals from candidates to be resolved within the centre. BIIAB will only consider a candidate's appeal after the centre's internal appeals procedure has been fully exhausted.

For full details of the BIIABs appeals procedure please refer to www.biiab.org

9. Initial Assessment and Induction

Prior to the start of any programme it is recommended that centres should make an initial assessment of each learner. This is to ensure that the learners are entered for an appropriate type and level of qualification.

The initial assessment should identify the specific training needs that the learner has, and the support and guidance that they may require when working towards their qualification.

The centre must also identify any units the learner has already completed, or credits they have accumulated, relevant to the qualification.

BIIAB suggests that centres provide an induction programme to ensure the learner fully understands the requirements of the qualification they will work towards, their responsibilities as a learner, and the responsibilities of the centre.

10. Delivery

Centres **must** refer to the units that form the qualification and the standard that **must** be achieved in order to be awarded each unit. This is covered within the learning outcomes and assessment criteria that form part of the delivery.

11. Resources

BIIAB provides the following additional resources for this qualification:

- Evidence matrices for the competence / NVQ units, including a Summative Reflective account template
- Assessment Knowledge Modules (AKMs)
- Assessment Guidance for each of the AKMs
- Access to the units.

All of these resources are available for download via the HUB on centrezone.bii.org

The Hub is a secure area within CentreZone which centres approved for the qualification can access. The Hub contains documents relevant to the qualification. Centres will find The Hub on the list of tabs in CentreZone.

Evidence matrices

BIIAB provide a matrix that supports each competence unit. These are also identified within each of the unit information sections identified below. It is not essential that these resources are used to support the delivery of the content of the qualification; however they have been mapped against the learning outcomes and assessment criteria.

The evidence matrix is designed to help the learner and assessor with evidence collection. It is a mapping activity to ensure that all the 'Assessment Criteria' contained in the learning outcomes and covered, and is intended to help to keep the volume of evidence to a minimum. One matrix (or appropriate equivalent recording device) **must** be completed for each unit.

It is expected that a selection of various types of evidence is used as appropriate; columns in the matrix enable the assessor to enter the evidence type, e.g. Report, Log, Written Statement, and also the assessment method, e.g. Obs (= Observation), as shown in the assessment method key. By inserting portfolio reference numbers in the box provided, it will enable the assessor, IQA and EQA quickly to locate the evidence which is being submitted to demonstrate competence.

Examples of types of evidence learners could provide to prove competence:

- Record of observation of performance in the workplace
- Professional discussion
- Reflective account
- Product evidence (eg implementation plans, correspondence, work records)
- Testimony from senior colleagues/clients
- Personal report of actions and circumstances
- Recognition of Prior Achievement (RPA)
- Records of questioning
- Other.

Assessment Knowledge Modules (AKMs)

These provide a series of BIIAB set questions within the context of knowledge modules that can be used to assess the learners competence. These modules should be released to the learner for the assessment when they are determined to be ready to be able to successfully achieve it. The assessment does **not** have to be undertaken within secure conditions, but **must** be collected and held securely afterwards. Learners **must** be taught to the Learning Outcomes and Assessment Criteria within the unit **not** the assessment. A password will be provided to allow access this document upon approval for the qualification.

These are internally marked and verified but **must** be available to the EQA for external verification purposes.

Assessment Guidance for each of the AKMs

These provide a series of BIIAB suggested possible answers for the questions within the knowledge modules. Assessors can accept other appropriate answers.

These modules **must** be kept secure, only released to the learner for the assessment and collected and held securely afterwards. Learners **must** be taught to the Learning Outcomes and Assessment Criteria within the unit **not to** the possible answers of the assessment. A password will be provided to allow access this document upon approval for the qualification.

Access to the units

Units form the qualification and the standard that **must** be achieved in order to be awarded each unit. This is covered within the learning outcomes, assessment criteria and the indicative content that form part of the delivery. The majority of these units are written by Skills CFA, although some are written by other organisations. BIIAB includes the mandatory units within this pack, and makes all units available via centrezone.bii.org

Summative Reflective Account

In order to claim the unit(s) for the qualification, the learner will need to complete a summative reflective account, to reflect on their qualification, what they have learnt and how they have been able to apply this within their work role.

12. Design and delivery

Centres must refer to the units that form the qualification and the standard that must be achieved in order to be awarded each unit. This is covered within the learning outcomes and assessment criteria that form part of the delivery.

Each unit within this qualification has been allocated a number of Guided Learning Hours (GLH).

This can include activities such as training/class room based sessions, tutorials, supervised study or supervised 'on-the-job' learning and face-to-face or other pre-arranged 1:1 teaching sessions (e.g. simultaneous electronic communication such as webcam contact or internet messaging). It could also include time spent undertaking assessments.

The qualification will be assigned Total Qualification Time (TQT), which, as well as GLH, will include the estimated number of hours spend in preparation, study or any other supervised learning, study or assessment for an average learner.

When planning how to deliver the qualification it is important to refer to this definition.

Centres must refer to the Assessment Principles and Additional Requirements detailed in this handbook when planning the delivery and assessment of these qualifications.

13. Format of Units

All units within this qualification will be presented in a standard format that is consistent with the format for all units of assessment. The format will give tutors and learners guidance as to the requirements of the unit for successful completion. Each unit within this specification will be in the format below:

Unit Title

This will be shown as it appears on the Register of Regulated Qualifications (<http://register.ofqual.gov.uk>).

Unit Number / Unique Reference Number (URN)

The Unique Reference Number is the unique code that the unit is given by the Regulator. This unit will be referenced on the final qualification certificate. The same unique code for the unit applies in whichever qualification the unit is included within. BIIAB also assign their own unique unit numbers which will in most instances be the same number when the unit is used in multiple BIIAB qualifications.

Level

This identifies the level of demand for the unit, but may be a different level to that of the overall qualification. The level of the units will be set according to either National Occupational Standards or the level descriptors.

Credit

When a whole unit is completed the learner will achieve credits specified by the number of hours learning time it will take an average learner to complete the unit including the assessment.

Guided Learning Hours (GLH)

The time required by the unit for specific guidance to be provided by a tutor, mentor or expert in the subject area, for example in a training session or a one-to-one.

Learning Outcomes and Assessment Criteria

Learning Outcomes are what is expected that the learner will know, understand or be able to do upon successful completion of the unit.

Assessment Criteria are descriptions of the requirements that a learner is expected to meet in order to demonstrate that a learning outcome has been achieved.

14. Initial registration

Registration and certification

Learners should be registered and certificated via BIIABs On-line Registration and Certification Service (ORCS) www.orcs.biiab.org . Please refer to BIIAB's Centre Guidance for using ORCS.

Equal Opportunities and Diversity Policy

BIIAB has in place an equal opportunities policy, a copy can be found at <http://centrezon.bii.org/thehub/apprenticeships/qadocuments>

BIIAB is committed to ensure that:

- Approved centres operate an equal opportunities policy
- Approved centres communicate the policy to staff and learners
- Approved centres have an effective complaints and appeals procedure of which both staff and learners are made aware
- Approved centres are aware of their responsibilities in providing equality of opportunity, particularly with regard to provision for learners with particular assessment requirements.

Reasonable Adjustment Policy

Learners who require reasonable adjustments for their assessments must inform their assessor at the beginning of their course of their requirements. BIIAB has a reasonable adjustment policy in place, a copy of which is provided to all BIIAB approved centres and can be found at <http://centrezon.bii.org/thehub/apprenticeships/qadocuments>.

15. Mandatory Units

The following units are mandatory for this qualification. For access to all optional units please visit centrezone.bii.org

Title	Deliver customer service	
Skills CFA Reference	CS 7	
Level	2	
Credit Value	5	
GLH	27	
Unit Reference No.	A/506/2130	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand customer service delivery	1.1 Explain the relationship between customers' needs and expectations and customer satisfaction 1.2 Describe the features and benefits of an organisation's products and/or services 1.3 Explain the importance of treating customers as individuals 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation 1.5 Explain when and to whom to escalate problems 1.6 Describe methods of measuring their own effectiveness in the delivery of customer service	
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to an organisation 2.2 Explain how a brand affects an organisation's customer service offer 2.3 Explain the importance of using customer service language that supports a brand promise 2.4 Identify their own role in ensuring that a brand promise is delivered	
3. Be able to prepare to deal with customers	3.1 Keep up to date with an organisation's products and/or services 3.2 Prepare resources that are necessary to deal with customers before starting work	

<p>4. Be able to provide customer service</p>	<p>4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>4.2 Adapt their own behaviour to meet customers' needs or expectations</p> <p>4.3 Respond to customers' requests in line with organisational guidelines</p> <p>4.4 Inform customers of the progress of their requests</p> <p>4.5 Confirm that customers' expectations have been met in line with the service offer</p> <p>4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service</p>
<p>5. Be able to support improvements to customer service delivery</p>	<p>5.1 Identify ways that customer service could be improved for an organisation and individuals</p> <p>5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery</p>

Additional Information about the unit	
<p>Unit expiry date</p>	<p>August 31 2014</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA1 Maintain a positive and customer-friendly attitude • CFACSA2 Behave in a way that gives a good customer service impression • CFACSA4 Give customers a positive impression of yourself and your organisation • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA8 Make customer service personal • CFACSB1 Do your job in a customer friendly way • CFACSB2 Deliver reliable customer

	service <ul style="list-style-type: none"> • CFACSF2 Deliver customer service within the rules
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Understand customers	
Skills CFA Reference	CS 8	
Level	2	
Credit Value	2	
GLH	17	
Unit Reference No.	F/506/2131	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers	
2. Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty	

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSF3 Show understanding of customer service principles • CFACSB15 Build and maintain effective customer relations
Assessment requirements or guidance	N/A

specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Title	Principles of customer service	
Skills CFA Reference	CS 9	
Level	2	
Credit Value	4	
GLH	34	
Unit Reference No.	J/506/2132	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand customer service	1.1 Explain the purpose and scope of customer service 1.2 Define the term “service offer” 1.3 Explain the value of a “service offer” to an organisation 1.4 Explain the importance of delivering consistently high quality customer service 1.5 Explain the importance of keeping up to date with knowledge of competitors’ activities 1.6 Explain barriers to providing effective customer service 1.7 Describe the features of effective follow-up service	
2. Understand how legal and ethical requirements relate to customer service	2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service 2.2 Describe how health, safety and environmental legislation affects customer service delivery 2.3 Explain how ethical considerations affect customer service 2.4 Explain how equality legislation affects customer service 2.5 Describe how legislation affects the use and storage of customer information	

<p>3. Understand how to deliver effective customer service</p>	<p>3.1 Explain the difference between customers' wants, needs and their expectations</p> <p>3.2 Explain how to identify customers' needs and expectations</p> <p>3.3 Explain the importance of managing customers' expectations</p> <p>3.4 Explain how to behave in a way that meets customers' expectations</p> <p>3.5 Describe techniques that can be used to put customers at ease and gain their trust</p> <p>3.6 Explain the importance of following up actions and keeping promises when delivering customer service</p>
<p>4. Understand the management of customer service information</p>	<p>4.1 Explain how customer service information can be used</p> <p>4.2 Explain the importance of systems to manage customer service information</p> <p>4.3 Explain the uses of systems to manage customer service information</p> <p>4.4 Identify the features of an effective customer complaints process</p> <p>4.5 Describe the uses of a customer complaints process</p>

Additional Information about the unit	
<p>Unit expiry date</p>	<p>August 31 2014</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSA6 Process information about customers • CFACSB2 Deliver reliable customer service • CFACSB4 Recognise diversity when delivering customer service • CFACSB12 Maintain and develop a healthy and safe customer service environment • CFACSF3 Show understanding of customer service principles
<p>Assessment requirements or guidance</p>	<p>N/A</p>

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

Unit Title	Understand employer organisations	
BIIAB Reference	BA38	
Level	2	
Credit Value	4	
GLH	40	
Unit Reference No.	A/506/1964	
Learning Outcome - The learner will:	Assessment Criterion - The learner can:	
1 Understand organisational structures	1.1	Explain the differences between the private sector, public sector and voluntary sector
	1.2	Explain the functions of different organisational structures
	1.3	Describe the features of different types of legal structures for organisations
2 Understand the organisational environment	2.1	Describe the internal and external influences on organisations
	2.2	Explain the use of different models of analysis in understanding the organisational environment
	2.3	Explain why change in the business environment is important

Title	Manage personal performance and development	
Skills CFA Reference	M&L 1	
Level	2	
Credit Value	4	
GLH	18	
Unit Reference No.	L/506/1788	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 Agree criteria for measuring progress and achievement with line manager 1.3 Complete tasks to agreed timescales and quality standards 1.4 Report problems beyond their own level of competence and authority to the appropriate person 1.5 Take action needed to resolve any problems with personal performance	
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 Explain the benefits of achieving an acceptable “work-life balance”	
3. Be able to identify their own development needs	3.1 Identify organisational policies relating to personal development 3.2 Explain the need to maintain a positive attitude to feedback on performance 3.3 Explain the potential business benefits of personal development 3.4 Identify their own preferred learning style(s) 3.5 Identify their own development needs from analyses of the role, personal and team objectives 3.6 Use feedback from others to identify their own development needs	

	3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs
4. Be able to fulfil a personal development plan	<p>4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2 Make use of formal development opportunities that are consistent with business needs</p> <p>4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4 Review progress against agreed objectives and amend plans accordingly</p> <p>4.5 Share lessons learned with others using agreed communication methods</p>

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LAA1 Manage yourself
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	31 August 2014

Learner Summative Reflection



The purpose of this summative reflection is to enable you, the learner, to reflect on your qualification, what you have learnt and how you have been able to apply this within your work role.

You will need to complete your statement in the space provided below and sign and date the document. Alternatively you and your assessor may wish to record your reflection on a voice recorder.

Learner Name: _____

Qualification Unit Summary

Unit No.	Completion Date	Assessor Signature	Unit No.	Completion Date	Assessor Signature

Learner Reflection

Learner Signature: _____

Date: _____

Assessor Signature: _____

Date: _____

Notices

This book does not purport to contain an authoritative or definitive statement of the law or practice on any subject appertaining to the operation of licensed premises and the publishers supply the information on the strict understanding that no legal or other liability attaches to them in respect of it. References to sources of further guidance or information have been made where appropriate.

© BIIAB January 2018

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, whether electronic, mechanical, photocopying, scanning, recording or otherwise, without written permission of the publisher except in accordance with the provisions of the Copyright, Designs and Patents Act 1988. Applications for written permission to reproduce any part of the publication should be addressed in writing to the publisher. Any unauthorised or restricted act in relation to this publication may result in civil proceedings and/or criminal prosecution.