Qualification Handbook

BIIAB Level 1 Award in Customer Service

601/6789/0

Version 3

BIIAB Level 1 Award in Customer Service Handbook

Version and date	Change, alteration or addition	Section
Version 2, July 2017	Assessment methodology for units CS43, CS45 and CS46	Rules of Combination and Structure
Version 3, January 2018	Updated throughout to remove reference to "QCF"	
	Updated RoC with TQT figures	

Table of Contents

1. About the BIIAB Level 1 Award in Customer Service

BIIAB is regulated to deliver this qualification by Ofqual and CCEA Regulations England and Northern Ireland respectively. The qualification has a unique Qualification Number (QN) which is shown below. Each unit within the qualification will also have a regulatory Unit Reference Number (URN).

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

Qualification Title	Qualification Number (QN)
BIIAB Level 1 Award in Customer Service	601/6789/0

2. Objective and Purpose of this Qualification

This qualification has been designed for learners who wish to develop skills and knowledge in Customer Service at level 1.

The primary purpose of the qualification is to prepare for further learning. However, employers can also rely on the knowledge provided as meeting nationally recognised standards for Customer Service at this level and as such the sub-purpose is to develop knowledge and/or skills in this subject area.

Due to constant Regulatory, policy and funding changes users are advised to check this qualification is funded for use with individual learners before making registrations. If you are unsure about the qualification's status please contact BIIAB head office.

3. About this Handbook

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.

4. 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.

5. 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 (eg 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 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.

6.   BIIAB Level 1 Award in Customer Service Rules of Combination (ROC) and Structure

To achieve the BIIAB Level 1 Award in Customer Service learners **must** gain a **total of 7** credits. This **must** consist of:

- **Minimum total** credit: **7**

- Mandatory Group A **minimum** credit: **3**

- Optional Group B **minimum** credit: **4**

- A **minimum of 4** credits **must** be achieved through the completion of units at **Level 1** and above.

- GLH: **50**

- TQT: **70**

The qualification has been developed to provide skills and knowledge for learners to progress at this level.

Listed below are the qualification units.

Mandatory Group A

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
CS1	L/506/2083	Understand working in a customer service environment	3	1	25	Assessment Knowledge Module

Optional Group B

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
CS2	Y/506/2085	Communication in customer service	2	1	14	Portfolio
CS4	A/506/2113	Deal with customer queries, requests and problems	3	1	11	Portfolio
CS43	F/601/6079	Contribute to effective customer service	2	1	20	Assessment Activity Module
BA39	L/506/1905	Employee rights and responsibilities	2	2	16	Assessment knowledge Module
CS44	A/601/6047	The importance of appearance and behaviour in customer service	2	Entry 3	15	Assessment Knowledge Module
CS45	R/601/6054	Understand how to deal with queries and requests	3	Entry 3	20	Portfolio
CS46	R/601/6071	Apply legislation, regulation and organisational procedures for customer service	3	1	24	Portfolio

Barred Unit

This Unit	Is barred against this Unit
CS4 Deal with customer queries, requests and problems (A/506/2113)	CS45 Understand how to deal with queries and requests (R/601/6054)

7. Age Restriction

The qualification in this handbook is appropriate for use in the following age ranges:

- Pre-16
- 16-18
- 19+.

8. 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 skills and knowledge to work effectively within Customer Service at this level. It also will allow for a number of progression routes to employment and into other areas of learning. The recommended progression route is to the BIIAB Level 2 Diploma in Customer Service which focuses on the skills required to work in Customer Service roles at level 2.

Achievement of the qualification offers opportunities for progression, including:

- 601/3734/4   BIIAB Level 2 Diploma in Customer Service

9. Assessment

Overview of assessment strategy

The qualification contains two competence units and six knowledge units. The two competence units (CS2 and CS4) must be assessed in accordance with the Skills CFA Assessment Strategy. These two units can be assessed in the workplace or in a Realistic Working Environment (RWE). This 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.

The knowledge units are assessed by Assessment Knowledge Modules (AKMs) externally set by the BIIAB or Centre Devised Assessments. 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).

Centres **must** obtain approval for any Centre Devised Assessments before their use. Please contact BIIAB for details of the Centre Devised Assessment process and procedure.

Unit CS43 combines knowledge and skills and as such is assessed by Assessment Activity Module (AAM). This is an internally marked assessment, containing a series of questions and tasks, marked and internally verified by the centre and with external verification by the BIIAB EQA.

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.

Requirements of Assessors, Expert Witnesses, Internal and External Quality Assurers

Learners may be assessed, moderated or verified either by one or several appointed individuals.

Assessors - The primary responsibility of an assessor is to assess learners' performance in a range of tasks and to ensure the evidence submitted by the learner 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 learners. To be able to assess learners, assessors **must:**

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess learners 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.

- have a working knowledge of customer service. 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 National Occupational Standards, 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.

Expert Witnesses – Witnesses don't have to be "expert". They can be drawn from a wide range of people who can attest to the learner's performance in the workplace, such as line managers, experiences workplace colleagues, customers or clients. They need to:

- provide a written statement about the quality and authenticity of the learner's work
- have first-hand experience of the learner's performance and understanding.

As the assessment decision lies with the Assessor, it is their responsibility to verify this and, where challenged, to justify their acceptance of third party 'witness testimony' to the Internal Quality Assurer.

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 IQAs.

IQAs **must:**

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and learners. IQAs 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 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.

- have a working knowledge of customer service. 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.

- have a working knowledge of customer service. 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.

Awarding Organisations require all assessors, moderators and verifiers to maintain current subject competence to deliver these functions and recognise 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 learner'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 learners. However, assessors **must** ensure that, as far as possible, the conditions for assessment should be those under which the learner usually works.

Knowledge tests

Employers can use knowledge tests to assess an employee's knowledge and understanding of, for example, an organisational procedure.

Knowledge components set out in the standards can also be assessed by knowledge tests. In this case, assessors and internal verifiers must make sure that:

- the use of knowledge tests has been agreed with the external verifier in advance
- the knowledge being tested matches that specified in the NOS
- a robust assessment methodology comparable to awarding body practices is used

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 learners to be resolved within the centre. BIIAB will only consider a learner's appeal after the centre's internal appeals procedure has been fully exhausted.

For full details of the BIIAB's appeals procedure please refer to www.biiab.org.

10. 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.

11. Resources

BIIAB provides the following additional resources for this qualification:

- Assessment Knowledge Modules (AKMs) for assessing specific units
- Assessor Guidance for assessing specific units
- Evidence Matrices for the competence units
- a Summative Reflective account
- 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.

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 the Sector

Skills Council, although some are written by other organisations. BIIAB includes the mandatory units within this pack, and makes all units available via www.biiab.org.

Learner Summative Reflection

In order to claim the unit(s) for the qualification, the learner will need to complete a learner summative reflection, 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 / Unit Reference Number (URN)

The Unit 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 unique unit numbers which normally is consistent 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 National Occupational Standards and 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 required number of hours that learning should take place under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training.

Learning Outcomes and Assessment Criteria

Learning Outcomes are what the learner is expected to 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 BIIAB's 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://centrezone.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://centrezone.bii.org/thehub/apprenticeships/qadocuments.

15. Qualification Review and Feedback

BIIAB is committed to the ongoing review of this qualification to ensure it remains fit for purpose.

This review approach involves the collation of evidence in the form of any information, comments and complaints received from users of this qualification in relation to its development, delivery and award.

BIIAB will give due regard to any credible evidence received which suggests that a change in approach to the development, delivery and award of this qualification is required in order to ensure that no adverse effects will result. This qualification will be reviewed and revised to ensure the approach remains appropriate and that it is fit for purpose.

16. Mandatory Units

The following units are mandatory for this qualification. The optional units are available in the Unit Pack via the qualification page on www.biiab.org.

Title	Understand working in a customer service environment
Skills CFA Reference	CS 1
Level	1
Credit Value	3
GLH	25
Unit Reference No.	L/506/2083

Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1. Know the importance of customer service	1.1 State what is meant by "customer service" 1.2 State why effective customer service is important to an organisation
2. Know the factors affecting customer service	2.1 Outline the difference between an internal and an external customer 2.2 State how to identify customers' needs and expectations 2.3 List information sources needed to deliver reliable customer service 2.4 Describe the relationship between customer expectations and customer satisfaction
3. Know how to work in a customer service role	3.1 Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services 3.2 Identify the job roles within a team delivering customer service 3.3 State the standards of personal presentation and behaviour expected by customer service staff in different organisations 3.4 State standards and practices that relate to a service offer within different types of organisation 3.5 Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role 3.6 Describe the procedures for protecting customers' personal information and safety 3.7 State the importance of protecting customers' personal information and

		safety
4. Know how to refer customer queries and problems to others	4.1 Describe types of customer behaviour that show when a customer is dissatisfied	
	4.2 State the procedures to be followed when dealing with customer queries or problems	
	4.3 State to whom to refer customer queries and problems	

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)	Customer Service (2013) National Occupational Standards: • CFACSA4 Give customers a positive impression of yourself and your organization • CFACSB2 Deliver reliable customer service • CFACSC1 Recognise and deal with customer queries, requests and problems • CFACSF3 Show understanding of customer service principles
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
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	31 August 2014

17. BIIAB Level 1 Award in Customer Service Sign-off Sheet

To achieve the BIIAB Level 1 Award in Customer Service learners **must** gain a **total of 7** credits. This **must** consist of:

- **Minimum total** credit: **7**

- Mandatory Group A **minimum** credit: **3**

- Optional Group B **minimum** credit: **4**

- A **minimum of 4** credits **must** be achieved through the completion of units at **Level 1** and above.

- Minimum GLH: **50**

- Maximum GLH: **70**

Learners and centres should complete the following table to confirm when a unit is considered as complete. Only units that are a requirement of the rules of combination (RoC) and Optional units that are selected to meet the RoC requirements need to be completed.

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: _____

Mandatory Group A

Unit No.	URN	Unit Title	Learner Signature	Date	Assessor Signature	Date	Internal Quality Assurer signature (if sampled)	Date
CS1	L/506/2083	Understand working in a customer service environment						

Optional Group B

Unit No.	URN	Unit Title	Learner Signature	Date	Assessor Signature	Date	Internal Quality Assurer signature (if sampled)	Date
CS2	Y/506/2085	Communication in customer service						
CS4	A/506/2113	Deal with customer queries, requests and problems						
CS43	F/601/6079	Contribute to effective customer service						
BA39	L/506/1905	Employee rights and responsibilities						
CS44	A/601/6047	The importance of appearance and behaviour in customer service						
CS45	R/601/6054	Understand how to deal with queries and requests						
CS46	R/601/6071	Apply legislation, regulation and organisational procedures for customer service						

Notices

This book does not purport to contain an authoritative or definitive statement of the law or practice on any subject 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

Infor House
1 Lakeside Road
Farnborough
Hampshire
GU14 6XP