BIIAB

Qualification Guidance Document

BIIAB Level 1 Certificate in Customer Service

England – 601/3733/2

About Us

At BIIAB Qualifications Limited we continually invest in high quality qualifications, assessments and services for our chosen sectors. As a UK leading sector specialist, we continue to support employers and skills providers to enable individuals to achieve the skills and knowledge needed to raise professional standards across our sectors.

BIIAB Qualifications Limited have an on-line registration system to help customers register learners on its qualifications, units and exams. In addition, it provides features to view exam results, invoices, mark sheets and other information about learners already registered.

The system is accessed via a web browser by connecting to our secure website using a username and password: Skills and Education Group Awards Secure Login

Sources of Additional Information

The BIIAB Qualifications Limited website provides access to a wide variety of information.

Copyright

Specification Code

The specification code is C7060-01.

Issue	Date	Details of change
1.4	July 2023	Reformatted Qualification Guide into new branding

601/3733/2 – v1.6

| 1.5 | May 2025 | Qualification Review Date extended for two years – no change to the content of the qualification. |
| 1.6 | February 2026 | Updated to new company branding |

This guide should be read in conjunction with the Indicative Content document which is available on our secure website using the link above.

Contents

This is a live document and as such will be updated when required. It is the responsibility of the approved centre to ensure the most up-to-date version of the Qualification Specification is in use. Any amendments will be published on our website and centres are encouraged to check this site regularly.

Qualification Summary

BIIAB Level 1 Certificate in Customer Service – 601/3733/2								
Qualification Purpose	To obtain and then demonstrate the skills and knowledge to work at an entry position in the Customer Service sector, with considerable supervision							
Age Range	Pre 16	✓	16-18	✓	18+		19+	✓
Regulation	The above qualification is regulated by Ofqual							
Assessment	> Portfolio of Evidence > Practical Demonstration/Assignment							
Type of Funding Available	See FaLA (Find a Learning Aim)							
Grading	Pass/Fail To achieve a Pass grade, learners **must** achieve all the Learning Outcomes and Assessment Criteria in all the units completed							
Operational Start Date	01/09/2014							
Review Date	30/09/2027							
Operational End Date								
Certification End Date								
Guided Learning (GL)	143 hours							
Total Qualification Time (TQT)	230 hours							
Credit Value	23							
BIIAB Qualifications Limited Sector	Business Support							
Regulator Sector	15.2 Administration							
Support from Trade Associations								

Introduction

BIIAB Qualifications Limited is regulated to deliver this qualification by Ofqual in England. 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 Certificate in Customer Service	601/3733/2

Pre-requisites

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.

BIIAB Qualifications Limited expects approved centres to recruit with integrity on the basis of a trainee's ability to contribute to and successfully complete all the requirements of a unit(s) or the full qualification.

Qualification Structure and Rules of Combination

Qualification Title: BIIAB Level 1 Certificate in Customer Service

Learners must achieve a total of 23 credits. 14 credits must come from the mandatory units and 9 credits must come from the optional units in groups B (Minimum of 6 credits) and C (maximum on 3 credits).

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 outlined.

Listed below are the qualification units.

Unit Title	Unit Number	Level	Credit Value	GL
Mandatory Group Minimum Credit Target - 14				
Understand working in a customer service environment	L/506/2083 CS1	1	3	25
Communication in customer service	Y/506/2085 CS2	1	2	14
Principles of personal performance and development	L/506/1791 BA 1	1	3	30
Principles of working in a business environment	R/506/1792 BA 2	1	4	25
Work with others in a business environment	Y/506/1793 BA 3	1	2	18

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group B Minimum Credit Target - 9				
Record details of customer service problems	A/506/2094 CS3	1	3	14
Deal with customer queries, requests and problems	A/506/2113 CS4	1	3	11
Communicate with customers in writing	T/506/2126 CS6	2	3	20
Deal with incoming telephone calls from customers	H/506/2154 CS10	2	3	16
Make telephone calls to customers	K/506/2155 CS11	2	3	16
Process information about customers	R/506/2134 CS13	2	3	14

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group C Maximum Credit Target - 3				
Meet and welcome visitors in a business environment	A/506/1799 BA 8	1	2	20
Manage time and workload	H/506/1795 BA 5	1	1	10
Contribute to sales activities in a contact centre	F/503/0392 CFAQ1	1	3	6
Use specific features of contact centre systems and technology	F/503/0361 CFAQ2	1	3	12
Health and safety procedures in the workplace	T/505/4673 CFAQ3	2	2	16
Processing sales orders	M/502/8587 CFAQ4	2	2	17
Meeting customers' after sales needs	R/502/8601 CFAQ5	2	3	14

Aim

The BIIAB Level 1 Certificate in Customer Service has been designed to allow learners to obtain and then demonstrate the skills and knowledge to work at an entry position in the Customer Service sector, with considerable supervision.

Due to constant regulatory, policy and funding changes users are advised to check this qualification has been placed in the relevant Apprenticeship Framework and / or is funded for use with individual learners before making registrations. If you are unsure about the qualification's status, please contact BIIAB head office.

Target Group

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

> Pre-16
> 16-18
> 19+

Assessment

This qualification is internally assessed and requires internal and external moderation. Specific requirements and restrictions may apply to individual units within qualifications. Please check unit and qualification details for specific information.

Centres must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the 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 Qualifications Limited. 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 Qualifications Limited will ensure that effective learning has taken place and that learners have the opportunity to:

> Meet the assessment criteria
> Achieve the learning outcomes

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

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 workplace 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 review the portfolio of evidence during the assessment process.

An External Quality Assurer (EQA), who is appointed by BIIAB, will quality assure the assessment and internal quality assurance 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 team leading qualification. Centres should also refer to the full strategy available at www.skillscfa.org.

Skills CFA assessment strategy

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

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.

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 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

> 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.

Awarding organisations require all assessors, moderators and verifiers to maintain current competence to deliver these functions. BIIAB 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 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.

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

For full details of the BIIAB Qualifications Limited's appeals procedure please refer to https://biiab.co.uk/policies-and-procedures/

Assessments will be accessible and will produce results that are valid, reliable, transparent and fair. BIIAB Qualifications Limited will ensure that the result of each assessment taken by a learner in relation to a qualification reflects the level of attainment demonstrated by that learner in the assessment and will be based upon the achievement of all of the specified learning outcomes.

BIIAB Qualifications Limited will make every effort to ensure that it allows for assessment to:

> be up to date and current
> reflect the context from which the learner has been taught
> be flexible to learner needs

Please refer to the Instructions for the Conduct of Examinations and Other External Assessment for further information.

Resources

BIIAB Qualifications Limited provides the following additional resources for this qualification:

> Evidence matrixes for the competence / NVQ units, including a Summative Reflective account template
> Assessment Knowledge Module (AKMs)
> Assessor Guidance for each of the AKMs
> Learner Unit Achievement Checklist

All of these resources are available on request.

Evidence Matrixes

BIIAB Qualifications Limited 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 Qualifications Limited set questions within the context of knowledge modules that can be used to assess the learner's 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 the Learning Outcomes and Assessment Criteria within the unit not the assessment. A password will be provided to allow access to 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.

Practice Assessment Material

BIIAB Qualifications Limited confirm that there is no practice assessment material for this qualification.

Teaching Strategies and Learning Activities

Centres should adopt a delivery approach which supports the development of all individuals. The aims and aspirations of all the learners, including those with identified special needs or learning difficulties/disabilities, should be considered and appropriate support mechanisms put in place.

Progression Opportunities

Achievement of this qualification will allow for a number of progression routes into Level 2 qualifications, to employment or into other areas of learning.

Achievement of the qualification offers opportunities for progression, including:

> BIIAB Level 2 Diploma in Customer Service
> BIIAB Level 2 Diploma in Business Administration
> BIIAB Level 2 Diploma in Team Leading
> Career progression

Centres should be aware that Reasonable Adjustments, which may be permitted for assessment, may in some instances limit a learner's progression into the sector. Centres must, therefore, inform learners of any limits their learning difficulty may impose on future progression.

Tutor / Assessor Requirements

BIIAB Qualifications Limited require those involved in the teaching and assessment process to be suitably experienced and / or qualified. Assessors should also be trained and qualified to assess or be working towards appropriate qualifications.

Those responsible for Internal Quality Assurance (IQA) must be knowledgeable of the subject/occupational area to a suitable level to carry out accurate quality assurance practices and processes.

Language

This specification and associated assessment materials are in English only.

Mandatory Unit Details

Principles of personal performance and development	
Unit Reference	L/506/1791
Level	1
Credit Value	3
Guided Learning (GL)	30
Unit Summary	The purpose of this unit is to provide the learner with the knowledge of the principles of personal performance and development.

Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.7)	
The learner will	**The learner can**	
1. Know employees' rights and employers' expectations	1.1	State an organisation's expectations for the conduct of its employees
	1.2	State an employee's rights in relation to their employment
	1.3	State why it is important to work within employees' rights and employers' expectations
	1.4	State where to find information and advice on employees' rights and employers' expectations
2. Know how to manage their own work	2.1	Describe ways of managing allocated tasks to ensure they are completed on time
	2.2	State the purpose of keeping other people informed of progress and problems with work activities
	2.3	Explain the importance of accepting responsibility for one's own work

		2.4	State the limits of their own responsibilities at work
		2.5	State what to do when a problem arises with work activities
3. Know ways of managing and improving personal performance and development		3.1	State the purpose and benefits of personal development at work
		3.2	Describe the purpose of individual and team goals and targets
		3.3	Explain the use of personal development plans
		3.4	Explain the importance of fulfilling a personal development plan
		3.5	Outline a manager's role in an individual's personal development
		3.6	Outline relevant personal development opportunities and career paths within the organisation
		3.7	Describe how acting on feedback can benefit a team and organisation

Principles of working in a business environment	
Unit Reference	R/506/1792
Level	1
Credit Value	4
Guided Learning (GL)	25
Unit Summary	The purpose of this unit is to provide the learner with the knowledge of the principles of working in a business environment.

Learning Outcomes (1 to 4)	**Assessment Criteria (1.1 to 4.4)**	
The learner will	**The learner can**	
1. Know the purpose and structure of business organisations	1.1	State the purposes of different types of business organisations
	1.2	Explain why it is important for a business to be financially secure
	1.3	State the purposes of an organisational chart
	1.4	Describe the role of the main functional areas of business organisations
2. Know how to contribute to environmental sustainability within an organisation	2.1	State what is meant by "environmental sustainability"
	2.2	Explain why it is important to keep waste to a minimum
	2.3	Describe practices that may be used to minimise waste in a business environment
	2.4	State the standard procedures to be followed when recycling and disposing of waste
3. Know how to support equality and diversity within an organisation	3.1	State the meaning of the terms "equality" and "diversity"

	3.2	State why it is important to support equality and diversity in the work environment	
	3.3	Describe ways of behaving that show sensitivity and respect for other people	
	3.4	State the legal requirements relating to equality and diversity	
4. Know the requirements of confidentiality and security in an organisation	4.1	State the importance of maintaining organisational standards of confidentiality	
	4.2	Outline how confidentiality requirements affect the workplace	
	4.3	State the importance of maintaining organisational standards of security	
	4.4	Outline how security requirements affect the workplace	

Work with others in a business environment

Unit Reference	Y/506/1793
Level	1
Credit Value	2
Guided Learning (GL)	18
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to work with others in a business environment.

Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.5)	
The learner will	**The learner can**	
1. Know how to work with others in a business environment	1.1	Describe how their own role fits in with the role of others in their team
	1.2	Describe how their own behaviour can affect teamwork
	1.3	Describe behaviours that show trust, respect and consideration for others
	1.4	Outline the importance of following instructions when completing tasks
	1.5	State the importance of understanding authority at work
	1.6	State why it is important to behave in a way that does not cause conflict
	1.7	State what to do if problems occur when working with others
	1.8	Describe different ways to help colleagues with work activities
2. Be able to work with others in a business environment	2.1	Meet agreed deadlines, targets and quality standards

	2.2	Maintain expected standards of performance
	2.3	Act positively on feedback on own performance
	2.4	Treat others with courtesy and respect
	2.5	Follow organisational policies and procedures and legal requirements whilst working with others

Understand working in a customer service environment	
Unit Reference	L/506/2083
Level	1
Credit Value	3
Guided Learning (GL)	25
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to understand working in a customer service environment.

Learning Outcomes (1 to 4)		Assessment Criteria (1.1 to 4.3)	
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 organization
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	

Communication in customer service

Unit Reference	Y/506/2085
Level	1
Credit Value	2
Guided Learning (GL)	14
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to communicate in customer service.

Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)	
The learner will	**The learner can**	
1. Know how to communicate in a customer service role	1.1	Describe different methods of communicating with customers and when it is appropriate to use them
	1.2	Give examples of positive and negative customer service language
	1.3	State the importance of speaking clearly
	1.4	Describe how tone of voice can affect how customers perceive their experience
	1.5	Describe how body language conveys what someone is thinking or feeling
	1.6	Define the term "active listening"
	1.7	List the types of information needed to communicate effectively with customers
	1.8	State why it is important to pass information and messages to colleagues
2. Be able to communicate with customers	2.1	Listen "actively" to what customers are saying
	2.2	Check their own understanding of customers' needs

	2.3	Summarise information for customers
	2.4	Check that customers are satisfied with the information provided
	2.5	Follow organisational standards of behaviour and communication when interacting with customers
	2.6	Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers

Optional Group B Unit Details

Record details of customer service problems	
Unit Reference	A/506/2094
Level	1
Credit Value	3
Guided Learning (GL)	14
Unit Summary	The purpose of this unit is to enable the learner to gather and record details of customer service problems.

Learning Outcomes (1 to 3) The learner will	Assessment Criteria (1.1 to 3.2) The learner can	
1. Know how to process details of customers' problems	1.1	Describe how to recognise when customers are raising problems
	1.2	State why reference codes are used to identify customers and specific transactions
	1.3	Describe different types of questions to ask when processing details of customers' problems
	1.4	Describe how to behave and communicate with customers who are dissatisfied
	1.5	Describe when, why and to whom to refer customers' problems
2. Be able to gather and record details from customers who raise problems	2.1	Respond to customers calmly and Professionally
	2.2	Take details that will identify individual Customers
	2.3	Identify the nature and likely causes of Problems

	2.4	Check their own understanding of what customers see as a problem	
	2.5	Record details of customers' problems	
	2.6	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with problems	
3. Be able to refer details of customers' problems to colleagues	3.1	Refer customers' problems to the appropriate people	
	3.2	Explain to customers what is happening, without making promises	

Deal with customer queries, requests and problems

Unit Reference	A/506/2113
Level	1
Credit Value	3
Guided Learning (GL)	11
Unit Summary	The purpose of this unit is to enable the learner to deal with customer queries, requests and problems.

Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.6)	
The learner will	**The learner can**	
1. Know how to deal with customer queries, requests and problems	1.1	List queries and requests that customers are likely to have
	1.2	Describe how to identify customers' queries, requests and problems
	1.3	Describe how to behave and communicate with customers who are dissatisfied
	1.4	Describe the kinds of behaviour and communication that could make a situation worse
	1.5	Describe when, why and from whom to obtain information or help
	1.6	State to whom and when problems should be referred
2. Be able to deal with customers' queries and requests	2.1	Deal with queries and requests in a professional way
	2.2	Provide customers with responses to their queries within the limits of their own authority

		2.3	Obtain information or help when queries or requests cannot be answered
		2.4	Keep customers informed of progress
3. Be able to deal with customers' problems		3.1	Identify the nature of customers' Problems
		3.2	Communicate with customers calmly and confidently
		3.3	Resolve problems within the limits of their own authority
		3.4	Brief colleagues when referring problems
		3.5	Check that customers are satisfied with the actions taken
		3.6	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

Communicate with customers in writing

Unit Reference	T/506/2126
Level	2
Credit Value	3
Guided Learning (GL)	20
Unit Summary	The purpose of this unit is to enable the learner to understand how to communicate with customers in writing.

Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)	
The learner will	**The learner can**	
1. Understand how to communicate with customers in writing	1.1	Explain why it is necessary to use different forms of written communication for different purposes
	1.2	Describe practices for producing different forms of written communications
	1.3	Describe the potential benefits and limitations associated with communicating with customers in writing
	1.4	Explain the implications of confidentiality and data protection in communicating with customers in writing
2. Be able to plan written communications to customers	2.1	Identify the objective(s) of the communication
	2.2	Gather the information needed to draft the communication
	2.3	Select the form of written communication that is most likely to lead to customer satisfaction within the service offer
3. Be able to communicate with customers in writing	3.1	Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone

	3.2	Use language that is clear and concise, adapting it to meet identified customer needs
	3.3	Record decisions and actions taken and the reasons for them
	3.4	Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

Deal with incoming telephone calls from customers

Unit Reference	H/506/2154
Level	2
Credit Value	3
Guided Learning (GL)	16
Unit Summary	This unit provides the learner with the knowledge to understand how to deal with incoming telephone calls from customers and dealing with their questions and requests.

Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.5)	
The learner will	**The learner can**	
1. Understand how to deal with incoming customer calls	1.1	Explain why an organisation should have guidance on dealing with telephone calls
	1.2	Explain why an organisation should have an identity checking process
	1.3	Explain the importance of keeping customer information up to date
	1.4	Explain the importance of keeping customers informed of the progress of their call
	1.5	Describe how body language and facial expressions can be detected over the telephone
	1.6	Describe different questioning techniques used when dealing with incoming calls
	1.7	Explain how to handle abusive calls
2. Be able to establish the purpose of incoming customer calls	2.1	Verify the identity of callers in line with organisational guidelines
	2.2	Speak clearly, concisely and politely using speech and tone to create a rapport

	2.3	Adapt their own communication style to meet customers' needs	
	2.4	Listen actively to what customers are saying to collect as much information as possible	
	2.5	Use questioning techniques that are appropriate to the conversation	
	2.6	Record information in line with organisational guidelines	
3. Be able to deal with customer questions and requests	3.1	Respond in a way that best meets customer and organisational requirements	
	3.2	Give clear and concise information that meets customers' needs	
	3.3	Manage the length of the conversation	
	3.4	Confirm that the customer is satisfied with the outcomes of the conversation	
	3.5	Complete agreed post-call follow up actions	

Make telephone calls to customers	
Unit Reference	K/506/2155
Level	2
Credit Value	3
Guided Learning (GL)	16
Unit Summary	The purpose of this unit is to enable the learner to be able to plan and make telephone calls to customers.
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.9)**
The learner will	**The learner can**
1. Understand how to make telephone calls to customers	1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls
	1.2 Explain the importance of keeping customer information up to date
	1.3 Explain the reasons for organisational guidance on dealing with telephone calls
	1.4 Explain the reasons for organisational identity checking processes
	1.5 Explain how body language and facial expressions can be detected over the telephone
	1.6 Describe different questioning techniques when dealing with customers
	1.7 Explain organisational guidelines for what can and cannot be said or promised
	1.8 Explain how to handle abusive calls from customers
2. Be able to plan telephone calls to customers	2.1 Identify the objective(s) of calls

	2.2	Prepare the information needed to make calls
	2.3	Plan the structure of calls
	2.4	Identify customers' likely responses and how they can be dealt with
3. Be able to make telephone calls to customers	3.1	Use telecommunications equipment in accordance with organisational standards
	3.2	Confirm the identity of customers in line with organisational guidelines
	3.3	Make the customer aware of the purpose of the call as early as possible
	3.4	Speak clearly, concisely and politely, using speech and tone to create rapport
	3.5	Adapt their own communication style to meet customers' needs
	3.6	Listen actively to what customers are saying to collect as much information as possible
	3.7	Give clear and concise information that meets customers' needs
	3.8	Record information in line with organisational guidelines
	3.9	Complete agreed follow up actions after closing the telephone call

Process information about customers	
Unit Reference	R/506/2134
Level	2
Credit Value	3
Guided Learning (GL)	14
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to process information about customers.

Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)	
The learner will	**The learner can**	
1. Understand how to process customer information	1.1	Describe the functions of customer information systems
	1.2	Explain the way in which legislation and regulatory requirements affect the processing of customer information
	1.3	Explain different responsibilities and levels of authority for processing customer service information
	1.4	Explain the reliability of sources of customer information
	1.5	Explain the validity of customer information
2. Be able to process customer information	2.1	Record information about customers in line with organisational standards and procedures
	2.2	Keep customer information up to date
	2.3	Respond to requests for customer information from authorised people in a timely manner

	2.4	Retrieve customer information that meets the requirements of the request
	2.5	Supply customer information in a format appropriate for the recipient
	2.6	Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

Optional Group C Unit Details

Meet and welcome visitors in a business environment	
Unit Reference	A/506/1799
Level	1
Credit Value	2
Guided Learning (GL)	20
Unit Summary	The purpose of this unit is to enable the learner to know how to meet visors in a business environment.

Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)	
The learner will	**The learner can**	
1. Know how to meet visitors in a business environment	1.1	State an organisation's procedures for dealing with visitors
	1.2	Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors
	1.3	Identify any organisational health, safety and security requirements relevant to visitors
	1.4	Describe what to do and who to contact when problems with visitors arise
2. Be able to meet visitors in a business environment	2.1	Welcome visitors politely in accordance with organisational standards
	2.2	Confirm the identity of visitors and the reasons for their visit
	2.3	Check that any health, safety and security actions are carried out
	2.4	Record visitors' arrival and departure in accordance with organisational procedures

	2.5	Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards
	2.6	Present a positive personal image in accordance with organisational standards

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Manage time and workload	
Unit Reference	H/506/1795
Level	1
Credit Value	1
Guided Learning (GL)	10
Unit Summary	The purpose of this unit is to enable the learner to know how to and be able to manage own time and workload.

Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)	
The learner will	**The learner can**	
1. Know how to manage their own time and workload	1.1	Describe ways of managing time and workload
	1.2	State why it is important to the organisation and the individual that time and workload are managed effectively
	1.3	State why it is important to seek work and offer help to others
	1.4	Describe how seeking help from colleagues can help in managing workload
	1.5	Describe why it is important to accept responsibility for their own mistakes
2. Be able to manage time and workload	2.1	Use time management techniques to manage the completion of tasks
	2.2	Finish tasks within the allotted timescale
	2.3	Inform team members of progress and developments of work activities
	2.4	Ask for work when existing tasks have been completed

	2.5	Report problems beyond their own level of authority to the appropriate person
	2.6	Follow organisational procedures and legal requirements when managing time and workload

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Contribute to sales activities in a contact centre	
Unit Reference	F/503/0392
Level	1
Credit Value	3
Guided Learning (GL)	6
Unit Summary	The purpose of this unit is to enable the learner to contribute to sales activities in a contact centre.
Learning Outcomes (1 to 3) **The learner will**	**Assessment Criteria (1.1 to 3.3)** **The learner can**
1. Be able to gather and use specified sales information in a contact centre	1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures
	1.2 Provide information to customers about products and/or services in accordance with organisational procedures
	1.3 Collect from customers information that supports potential sales in accordance with organisational procedures
	1.4 Check with customers the accuracy of the information provided
	1.5 Keep records of customers in accordance with organisational procedures
2. Be able to make direct sales to customers through a contact centre	2.1 Identify customers in accordance with organisational procedures
	2.2 Establish customers' needs for potential sales of products and/or services within their level of authority
	2.3 Check with customers the accuracy of the order

	2.4	Refer customers to an authorised colleague when sales requests are beyond their level of authority	
	2.5	Complete the authorisation or payment in accordance with organisational procedures	
3. Understand sales activities in a contact centre	3.1	List the products and/or services offered or supported by the contact centre	
	3.2	List the regulations and/or legislation that has an impact on dealing with customers	
	3.3	State the organisational procedures for processing sales and payments and/or establishing order authority with customers	

Use specific features of contact centre systems and technology	
Unit Reference	F/503/0361
Level	1
Credit Value	3
Guided Learning (GL)	12
Unit Summary	The purpose of this unit is to enable the learner to understand and use contact centre systems and technology.

Learning Outcomes (1 to 2)		Assessment Criteria (1.1 to 2.8)	
The learner will		**The learner can**	
1. Be able to use contact centre systems and technology to carry out customer contact tasks	1.1	Log into the technology system that is appropriate for dealing with customer contacts	
	1.2	Follow defined pathways through the system to complete customer contact tasks	
	1.3	Use features of the technology contact handling system to control customer contacts	
	1.4	Locate information on the system needed to complete a customer contact	
	1.5	Identify to whom to refer when the customer contact cannot be completed	
	1.6	Input information into the system in accordance with organisational procedures	
	1.7	Validate the customer's identity from information given and information held on the system	
2. Understand contact centre systems and technology	2.1	State the organisational procedures and guidelines for handling customer contacts	

	2.2	List the products and/or services offered or supported by the contact centre
	2.3	List the regulation and/or legislation relevant to the contact centre's work with customers
	2.4	State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle
	2.5	State the procedures for logging onto the technology systems
	2.6	State how to respond to prompts from the system indicating the pathway to be followed
	2.7	State how to use systems and technology to handle customer contacts
	2.8	Identify the categories of customer contacts that they are authorised to handle

Health and safety procedures in the workplace	
Unit Reference	T/505/4673
Level	2
Credit Value	2
Guided Learning (GL)	16
Unit Summary	The purpose of this unit is to enable the learner to understand health and safety procedures and be able to carry out tasks with regard to health and safety in the workplace.

Learning Outcomes (1 to 2)		**Assessment Criteria (1.1 to 2.3)**
The learner will		**The learner can**
1. Know health and safety procedures in the workplace	1.1	Define the main responsibilities for health and safety in the workplace of the following: > employers > employees
	1.2	Describe two health and safety laws affecting the workplace
	1.3	Define the importance of following health and safety procedures in the workplace
	1.4	Define the types of information or support available in relation to a specified aspect of health and safety in the workplace
2. Be able to carry out tasks with regard to health and safety in the workplace	2.1	Carry out a risk assessment of a specified workplace activity
	2.2	Use equipment or tools safely in the Workplace
	2.3	Describe how to prevent accidents in the Workplace
	2.4	Assess how own health and safety practices could be improved

Processing sales orders	
Unit Reference	M/502/8587
Level	2
Credit Value	2
Guided Learning (GL)	17
Unit Summary	The purpose of this unit is to enable the learner to be able to process and follow up sales orders.

Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.3)	
The learner will	**The learner can**	
1. Understand how to process and follow up sales orders	1.1	Explain the importance of sales order processing
	1.2	Describe organisational processes for ordering products and/or services
	1.3	Describe different sources of information used to check customer credit
	1.4	Describe the different payment methods accepted by sales orientated organisations
	1.5	Explain the role of the despatch function
	1.6	Describe service standards relating to sales order completion
	1.7	Explain the importance of storing information securely
2. Be able to process sales orders	2.1	Identify customer sales order requirements
	2.2	Check that the credit status of the customer meets organisational standards
	2.3	Confirm the availability of products and/or services to the customer

	2.4	Ensure that information given to the customer about delivery, timing and price is accurate	
	2.5	Ensure that the sale is authorised following the organisation's procedures	
	2.6	Finalise the transaction in accordance with organisational procedures	
	2.7	Ensure that the customer is aware of the terms and conditions of sale	
	2.8	Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders	
	2.9	Identify who to go to when in need of support with sales order processing problems	
3. Be able to follow up sales order processing	3.1	Keep the customer informed of the sales order progress and any problems with the sale order	
	3.2	Advise the customer of current discounts and special offers	
	3.3	Check all information is stored securely	

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Meeting customers' after sales needs	
Unit Reference	R/502/8601
Level	2
Credit Value	3
Guided Learning (GL)	14
Unit Summary	The purpose of this unit is to enable the learner to be able to investigate, handle and review customers' after sales needs.
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.3)**
The learner will	**The learner can**
1. Be able to investigate customer after sales needs	1.1 Establish the nature of customers' after sales needs
	1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times
2. Be able to handle customers' after sales needs	2.1 Deal with customers' after sales needs following organisational customer service standards and procedures
	2.2 Balance customers' needs with those of the organisation
	2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority
	2.4 Fulfil commitments made to customers in accordance with quality and customer service standards
	2.5 Record commitments made to customers
3. Be able to review the after sales process	3.1 Obtain customers' comments on service reliability from customers

	3.2	Analyse and report the findings to the relevant person in the organisation
	3.3	Make recommendations for improvements to after sales service provision in the light of customer feedback

Recognition of Prior Learning (RPL), Exemptions, Credit Transfers and Equivalencies

BIIAB Qualifications Limited policy enables learners to avoid duplication of learning and assessment in a number of ways:

> **Recognition of Prior Learning (RPL)** – a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and do not need to develop through a course of learning.

> **Exemption** – Exemption applies to any certificated achievement which is deemed to be of equivalent value to a unit within BIIAB Qualifications Limited qualification, but which does not necessarily share the exact learning outcomes and assessment criteria. It is the assessor's responsibility, in conjunction with the Internal Moderator, to map this previous achievement against the assessment requirements of the BIIAB Qualifications Limited qualification to be achieved in order to determine its equivalence.

   > Any queries about the relevance of any certificated evidence should be referred in the first instance to your centre's internal moderator and then to BIIAB Qualifications Limited.

   > It is important to note that there may be restrictions upon a learner's ability to claim exemption or credit transfer which will be dependent upon the currency of the unit/qualification and a learner's existing levels of skill or knowledge.

   > Where past certification only provides evidence that could be considered for exemption of part of a unit, learners must be able to offer additional evidence of previous or recent learning to supplement their evidence of achievement.

> **Credit Transfer** – BIIAB Qualifications Limited may attach credit to a qualification, a unit or a component. Credit transfer is the process of using certificated credits achieved in one qualification and transferring that achievement as a valid contribution to the award of another qualification. Units/Components transferred must share the same learning outcomes and assessment criteria along with the same unit number. Assessors must ensure that they review and verify the evidence through sight of:

   > Original certificates OR

   > Copies of certificates that have been signed and dated by the internal moderator confirming the photocopy is a real copy and make these available for scrutiny by the External Moderator.

> **Equivalencies** – opportunities to count credits from the unit(s) from other qualifications or from unit(s) submitted by other recognised organisations towards the place of mandatory or optional unit(s) specified in the rule of combination. The unit must have the same credit value or greater than the unit(s) in question and be at the same level or higher.

BIIAB Qualifications Limited encourages its centres to recognise the previous achievements of learners through Recognition of Prior Learning (RPL), Exemption, Credit Transfer and Equivalencies. Prior achievements may have resulted from past or present employment, previous study or voluntary activities. Centres should provide advice and guidance to the learner on what is appropriate evidence and present that evidence to the external moderator in the usual way.

Further guidance can be found in 'Delivering and Assessing Qualifications' which can be downloaded from biiab.co.uk/for-centres/

Certification

Learners will be certificated for all units and qualifications that are achieved and claimed.

BIIAB Qualifications Limited policies and procedures are available on the website.

Exemptions

This qualification contains no exemptions. For further details see Recognition of Prior Learning (RPL), Exemptions, Credit Transfers and Equivalencies.

Glossary of Terms

GL (Guided Learning)
GL is where the learner participates in education or training under the immediate guidance or supervision of a tutor (or other appropriate provider of education or training). It may be helpful to think – 'Would I need to plan for a member of staff to be present to give guidance or supervision?'

GL is calculated at qualification level and not unit/component level.

Examples of Guided Learning include:
> Face-to-face meeting with a tutor
> Telephone conversation with a tutor
> Instant messaging with a tutor
> Taking part in a live webinar
> Classroom-based instruction
> Supervised work
> Taking part in a supervised or invigilated formative assessment
> The learner is being observed as part of a formative assessment.

TQT (Total Qualification Time)
The number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required, in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.' The size of a qualification is determined by the TQT.

TQT is made up of the Guided Learning (GL) plus all other time taken in preparation, study or any other form of participation in education or training but not under the direct supervision of a lecturer, supervisor or tutor.

TQT is calculated at qualification level and not unit/component level.

Examples of unsupervised activities that could contribute to TQT include:
> Researching a topic and writing a report
> Watching an instructional online video at home/e-learning
> Watching a recorded webinar
> Compiling a portfolio in preparation for assessment
> Completing an unsupervised practical activity or work
> Rehearsing a presentation away from the classroom
> Practising skills unsupervised
> Requesting guidance via email – will not guarantee an immediate response.