



Qualification Guidance Document

BIIAB Level 2 Certificate in Principles of Customer Service

England – 601/7253/8

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.

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Specification Code

The specification code is C7061-02.

Issue	Date	Details of change
2.0	January 2018	Updated throughout to remove reference to "QCF" RoC updated with TQT figures

2.1	August 2023	Reformatted Qualification Guide into new branding
2.2	May 2025	Qualification Review Date extended for two years – no change to the content of the qualification.
2.3	June 2025	Reformatted Qualification Guide into new branding
2.4	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.

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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 2 Certificate in Principles of Customer Service	
Qualification Purpose	To prepare for further learning
Age Range	Pre 16 ✓ 16-18 ✓ 18+ 19+ ✓
Regulation	The above qualification is regulated by: <ul style="list-style-type: none"> > Ofqual > CCEA Regulation
Assessment	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	01/10/2015
Review Date	30/09/2027
Operational End Date	
Certification End Date	
Guided Learning (GL)	135 hours
Total Qualification Time (TQT)	150 hours
Credit Value	15
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 2 Certificate in Principles of Customer Service	601/7253/8

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.

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 2 Certificate in Principles of Customer Service

Learners must achieve a total of **15** credits from the 3 mandatory units.

Listed below are the qualification units.

Unit Title	Unit Number	Level	Credit Value	GL
Mandatory Group Minimum Credit Target – 15				
Understanding the organisation	R/506/4854	2	5	45

Prepare to deliver excellent customer service	Y/506/4855	2	5	45
Communication in the customer service role	K/503/0323	2	5	45

Aim

This qualification has been designed for learners who wish to develop knowledge and understanding about Customer Service at level 2.

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 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 knowledge units. These units are assessed by Assessment Knowledge Modules (AKMs) externally set by BIIAB Qualifications Limited 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 Qualifications Limited External Quality Assurer (EQA).

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.

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:

- > Purpose Statement
- > Learner Unit Achievement Checklist (LUAC)

All of these resources are available on request.

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 to employment and into other areas of learning. The recommended progression route is to the BIIAB Level 2 Diploma in Customer Service or the BIIAB Level 3 Diploma in Customer Service, both of which focus on the skills required to work in Customer Service roles.

Achievement of the BIIAB Level 2 Certificate in Principles of Customer Service qualification offers opportunities for progression, including:

- > 601/3734/4 BIIAB Level 2 Diploma in Customer Service
- > 601/3735/6 BIIAB Level 3 Diploma in Customer Service

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.

Unit Details

Understanding the organisation	
Unit Reference	R/506/4854
Level	2
Credit Value	5
Guided Learning (GL)	45
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to understand the organisation.
Learning Outcomes (1 to 5)	Assessment Criteria (1.1 to 5.5)
The learner will	The learner can
1. Understand the factors that affect an organisation and the customer service role	1.1 Describe the products and services of commercial, public and third sector organisations 1.2 Describe the differences in customer service between commercial, public and third sector organisations 1.3 Outline the role played by the customer service occupation within the organisation and industry 1.4 Identify the major competitors of the organisation 1.5 Identify factors that can affect the reputation of the organisation
2. Understand employee rights, responsibilities and organisational procedures	2.1 State employer and employee rights and responsibilities under employment law and the importance of having these 2.2 Detail employer and employee rights and responsibilities under current workplace Health and Safety legislation

	2.3	Describe the organisation's procedures for health and safety and documentation used
	2.4	Outline how current Equality law relates to employment
	2.5	Identify other key legislation relating to industry and the organisation
	2.6	Describe organisational procedures for equality and diversity detailing any monitoring and documentation activity
3. Understand career pathways within customer service	3.1	Describe the main career pathways available within a customer service role
	3.2	Identify sources of information and advice available on the customer service industry, occupations and career progression
	3.3	Identify methods of learning available in the organisation to assist in career progression
	3.4	Identify the procedure for accessing formal learning programmes and the procedure for challenging refusal if available
	3.5	Explain how new customer service situations can aid self-development and career progression
4. Understand how employees are supported within the customer service role	4.1	Identify sources of information and advice on employment rights and responsibilities
	4.2	Identify types of representative body related to the industry
	4.3	Detail the main roles and responsibilities of each representative body and their relevance to the industry

	4.4	<p>Outline sources of support for their role within the organisation to include issues relating to:</p> <ul style="list-style-type: none"> > equality > health and safety > career progression
5. Know the organisation's policies and procedures	5.1	<p>Describe the main principles, policies and procedures of their organisation and its documentation</p> <p>5.2 Explain how the organisation's principles are disseminated to employees</p> <p>5.3 Outline relevant policies and codes of practice adopted by the organisation and how employees are made aware of these</p> <p>5.4 Explain how employees are consulted on changes to the principles, procedures and policies within the organisation</p> <p>5.5 Identify issues of public concern relating to their industry and organisation and how these are dealt with</p>

Prepare to deliver excellent customer service

Unit Reference	Y/506/4855	
Level	2	
Credit Value	5	
Guided Learning (GL)	45	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to deliver excellent customer service.	
Learning Outcomes (1 to 5)	Assessment Criteria (1.1 to 5.6)	
The learner will	The learner can	
1. Understand the principles of customer service in an organisation	1.1	Describe the organisation's products and services
	1.2	Explain how customers are made aware of the organisation's offer
	1.3	Identify the customers of the organisation
	1.4	Explain how to keep up to date with the organisation's offer
	1.5	Describe the organisation's policies and procedures relating to customer service and the importance of following them
	1.6	Describe the publicity available about the organisation's products and services
	1.7	Describe the implications of poor customer service in commercial, public sector and third sector organisations
2. Understand how customer needs and expectations are identified	2.1	Outline ways in which customer expectations can be identified
	2.2	Identify how customer expectations can be met within the offer of the organisation

	2.3	Describe how to tell customers that their needs cannot be met by the organisation
	2.4	Identify reasons for customer service being delayed and the impact of this on customers
	2.5	Outline how to tell customers that the service will be delayed
	2.6	Explain why it is important to keep customers informed of progress and delays when dealing with a complaint
3. Understand how to balance customer expectations against the organisation's offer	3.1	Outline the customer service offers of two organisations to include <ul style="list-style-type: none"> > one commercial organisation > one public or third sector organisation
	3.2	Explain how resource and financial implications reflect on the organisation's offer and customers' expectations
	3.3	Explain how customers' expectations are arrived at within their organisation's offer
	3.4	Identify examples of when customer service may be limited by organisational goals
	3.5	Describe how to tell a customer that their service expectations are outside of the organisation's offer
4. Understand how complaints are handled	4.1	Explain why customers may complain to or about an organisation
	4.2	Outline the complaints handling procedure in the organisation
	4.3	Identify ways in which complaints may be defused prior to escalation to include: <ul style="list-style-type: none"> > face to face > written (letter, email) > via the telephone

	4.4	Outline the effects of complaints on commercial, public sector and third sector organisations
5. Understand legislation relating to customer service	4.5	Explain why complaints are monitored and how the monitoring is used
	5.1	Identify customer-related legislation and external regulations and how these may affect customer service
	5.2	Outline how business service improvements might be limited by legislation
	5.3	Explain how current workplace Health and Safety laws are relevant to customer service
	5.4	Explain individual health and safety responsibilities while delivering customer service
	5.5	Identify ways in which the security of customers and their property can be protected
	5.6	Describe how to gain approval to change customer service procedures or practices that are affected by legislation

Communication in the customer service role

Unit Reference	K/503/0323	
Level	2	
Credit Value	5	
Guided Learning (GL)	45	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to communicate and handle customer information in a customer service role.	
Learning Outcomes (1 to 5)	Assessment Criteria (1.1 to 5.5)	
The learner will	The learner can	
1. Understand methods of communication with customers	1.1	Outline why different situations need different methods of communication
	1.2	Identify communication methods suitable for a series of customer interactions
	1.3	Identify the advantages and disadvantages of the main communication methods to customers to include: <ul style="list-style-type: none"> > Face to face > In writing > Via telephone
	1.4	Outline the content of a standard letter in response to a customer query
	1.5	Explain what is meant by active listening and its importance when dealing with customers
	1.6	Describe the standard greetings of three different organisations and how they impact on customers
2. Understand how to handle customer service information	2.1	Explain what information may be held about customers by an organisation

	2.2	Outline how customer information is kept secure and confidential
	2.3	Identify information about the organisation that should not be disclosed to customers
	2.4	Explain why certain information should not be disclosed to customers and the implications on the organisation if it is
3. Understand how to work as part of a team to provide effective customer service	3.1	Outline limits of individual role when delivering customer service
	3.2	Identify others involved in the customer service function
	3.3	Identify sources of assistance for queries outside individual responsibility
	3.4	Explain how other team members can assist in offering excellent customer service
	3.5	Explain the importance of keeping colleagues and others informed of customer service operations
	3.6	Outline how customer queries can aid individual and colleagues' development
	3.7	Explain how to disseminate customer service information for the benefit of colleagues
4. Understand how to meet the needs of a diverse range of customers	4.1	Identify the main types of customer that may need to be dealt with
	4.2	Describe the aids available to assist customers with special requirements
	4.3	Outline how to respect cultural diversity in customer service
	4.4	Explain how to recognise the following types of customer:

	4.5	<ul style="list-style-type: none"> > Angry > Distressed > Upset > Violent <p>Explain how to deal with customers who are:</p> <ul style="list-style-type: none"> > Angry > Distressed > Upset > Violent
5. Understand the importance of promoting and evaluating products and services	5.1 5.2 5.3 5.4 5.5	<p>Detail how products and services can be promoted in an organisation</p> <p>Explain the importance of evaluating customer service</p> <p>Identify methods of evaluation of the customer experience that may be used</p> <p>Detail how customer feedback is disseminated to colleagues</p> <p>Explain how evaluation can lead to customer service improvements</p>

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 bijab.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.