



Qualification Guidance Document

BIIAB Level 3 Diploma in Customer Service

England – 601/3735/6

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

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publishers.

This document may be copied by approved centres for the purpose of assessing learners. It may also be copied by learners for their own use.

Specification Code

The specification code is D5076-03.

Issue	Date	Details of change
1.5	August 2023	Reformatted Qualification Guide into new branding

1.6	May 2025	Qualification Review Date extended for two years – no change to the content of the qualification.
1.7	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

About Us	1
Sources of Additional Information	1
Copyright	1
Specification Code.....	1
Qualification Summary.....	6
Introduction.....	7
Pre-requisites.....	7
Qualification Structure and Rules of Combination	7
Aim	10
Target Group.....	11
Assessment	11
Overview of assessment strategy.....	11
Assessment Process.....	12
Assessment Strategy	12
Skills CFA assessment strategy	13
Requirements of Assessors, Expert Witnesses, Internal and External Quality Assurers	13
Evidence from Workplace Performance.....	15
Assessment of the Knowledge Units	16
Simulation	16
Appeals	17
Resources.....	17
Assessment Knowledge Modules (AKMs)	18
Assessment Guidance for each of the AKMs.....	18
Practice Assessment Material	18
Teaching Strategies and Learning Activities	18
Progression Opportunities	19
Tutor / Assessor Requirements.....	19
Language	19
Mandatory Unit Details	20
Organise and deliver customer service.....	20
Understand the customer service environment.....	22
Understand customers and customer retention.....	24

Resolve customers' problems	26
Principles of business	28
Manage personal and professional development	30
Optional Group B Unit Details	32
Develop resources to support consistency of customer service delivery	32
Use service partnerships to deliver customer service	34
Resolve customers' complaints	36
Gather, analyse and interpret customer feedback	38
Monitor the quality of customer service interactions	40
Communicate verbally with customers	42
Communicate with customers in writing	44
Promote additional products and/or services to customers	46
Exceed customer expectations	48
Deliver customer service whilst working on customers' premises	50
Deliver customer service to challenging customers	52
Develop customer relationships	54
Support customer service improvements	56
Support customers through real-time online customer service	58
Support customers using self-service equipment	60
Use social media to deliver customer service	62
Provide post-transaction customer service	64
Champion Customer Service	66
Build and maintain effective customer relations	68
Manage a customer service award programme	70
Manage the use of technology to improve customer service	72
Develop a social media strategy for customer service	74
Optional Group C Unit Details	76
Negotiate in a business environment	76
Promote equality, diversity and inclusion in the workplace	78
Manage team performance	80
Manage individuals' performance	82
Collaborate with other departments	84
Negotiating, handling objections and closing sales	86
Obtaining and analysing sales related information	88

Buyer behaviours in sales situations	90
Manage incidents referred to a contact centre	92
Lead direct sales activities in a contact centre team	94
Manage diary systems	97
Contribute to the organisation of an event.....	98
Provide reception services	100
Buddy a colleague to develop their skills	102
Employee rights and responsibilities	104
Processing sales orders	106
Bespoke Software	108
Recognition of Prior Learning (RPL), Exemptions, Credit Transfers and Equivalencies	110
Certification	111
Exemptions.....	111
Glossary of Terms	112

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 3 Diploma in Customer Service – 601/3735/6									
Qualification Purpose	To allow learners to obtain and then demonstrate the skills and knowledge to work at a high, and potentially supervisory, level in the Customer Service sector.								
Age Range	<table border="1"> <tr> <td>Pre 16</td> <td></td> <td>16-18</td> <td>✓</td> <td>18+</td> <td></td> <td>19+</td> <td>✓</td> </tr> </table>	Pre 16		16-18	✓	18+		19+	✓
Pre 16		16-18	✓	18+		19+	✓		
Regulation	The above qualification is regulated by: <ul style="list-style-type: none"> > Ofqual > CCEA Regulation > Qualifications Wales 								
Assessment	<ul style="list-style-type: none"> > 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)	289 hours								
Total Qualification Time (TQT)	550 hours								
Credit Value	55								
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 3 Diploma in Customer Service	601/3735/6

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 3 Diploma in Customer Service

To achieve the BIIAB Level 3 Diploma in Customer Service learners **must** gain a total of **55** credits. This **must** consist of:

- > Mandatory Group A **minimum** credit: **31**
- > Optional Groups B and C **minimum** credit: **24**. This **must** consist of:
 - > Optional Group B **minimum** credit: **15**
 - > Optional Group C **minimum** credit: **9**

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

Listed below are the qualification units.

Unit Title	Unit Number	Level	Credit Value	GL
Mandatory Group A Minimum Credit Target – 31				
Organise and deliver customer service	L/506/2150 CS25	3	5	27
Understand the customer service environment	Y/506/2152 CS26	3	5	40
Understand customers and customer retention	J/506/2910 CS27	3	4	35
Resolve customers' problems	K/506/2169 CS30	3	4	19
Principles of business	D/506/1942 B&A 59	3	10	74
Manage personal and professional development	T/506/2952 M&L 9	3	3	12

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group B Minimum Credit Target – 15				
Develop resources to support consistency of customer service delivery	Y/506/2166 CS28	3	5	21
Use service partnerships to deliver customer service	D/506/2167 CS29	3	3	20
Resolve customers' complaints	R/506/2151 CS31	3	4	22
Gather, analyse and interpret customer feedback	D/506/2170 CS32	3	5	24
Monitor the quality of customer service interactions	K/506/2172 CS33	3	5	27
Communicate verbally with customers	D/506/2119 CS5	2	3	14
Communicate with customers in Writing	T/506/2126 CS6	2	3	20

Promote additional products and/or services to customers	L/506/2133 CS12	2	2	14
Exceed customer expectations	Y/506/2135 CS14	2	3	15
Deliver customer service whilst working on customers' premises	T/506/2143 CS15	2	4	20
Deliver customer service to challenging customers	F/506/2159 CS18	2	3	16
Develop customer relationships	Y/506/2149 CS19	2	3	18
Support customer service improvements	T/506/2160 CS20	2	3	12
Support customers through real-time online customer service	A/506/2161 CS21	2	3	15
Support customers using self-service equipment	H/506/2977 CS22	2	3	18
Use social media to deliver customer service	J/506/2163 CS23	2	3	18
Provide post-transaction customer service	K/506/2978 CS24	2	5	22
Champion customer service	D/506/2153 CS35	4	4	17
Build and maintain effective customer relations	R/506/2179 CS38	4	6	25
Manage a customer service award programme	L/506/2181 CS40	4	4	15
Manage the use of technology to improve customer service	Y/506/2183 CS41	4	4	14
Develop a social media strategy for customer service	D/506/2962 CS42	4	5	16

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group C Minimum Credit Target – 9				
Negotiate in a business environment	H/506/1912 B&A 42	3	4	18

Promote equality, diversity and inclusion in the workplace	T/506/1820 M&L 10	3	3	15
Manage team performance	A/506/1821 M&L 11	3	4	21
Manage individuals' performance	J/506/1921 M&L 12	3	4	20
Collaborate with other departments	M/506/1931 M&L 21	3	3	14
Negotiating, handling objections and closing sales	F/502/8612 CFAQ10	3	4	22
Obtaining and analysing sales related information	R/502/8615 CFAQ11	3	4	24
Buyer behaviours in sales situations	K/502/8622 CFAQ12	3	3	27
Manage incidents referred to a contact centre	K/503/0418 CC39	3	6	30
Lead direct sales activities in a contact centre team	D/503/0397 CC20	3	4	8
Manage diary systems	L/506/1807 B&A 13	3	2	12
Contribute to the organisation of an event	L/506/1869 B&A 27	3	3	23
Provide reception services	H/506/1814 B&A 19	2	3	15
Buddy a colleague to develop their skills	M/506/1895 B&A 35	2	3	19
Employee rights and responsibilities	L/506/1905 B&A 39	2	2	16
Processing sales orders	M/502/8587 CFAQ4	2	2	17
Bespoke Software	J/502/4397 CFAQ29	3	4	30

Aim

The BIIAB Level 3 Diploma in Customer Service has been designed to allow learners to obtain and then demonstrate the skills and knowledge to work at a high, and potentially supervisory, level in the Customer Service sector.

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

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:

- > 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.skillsca.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, experienced 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.

Skills CFA and 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). An 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
- > Assessment Knowledge Modules (AKMs)
- > Assessor Guidance for each of the AKMs
- > Purpose Statement
- > Learner Unit Achievement Checklist

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

This qualification will allow for a number of progression routes into other level 4 qualifications, Level 3 qualifications, to employment or into other areas of learning.

Achievement of the qualification offers opportunities for progression, including:

- > BIIAB Level 3 Diploma in Management
- > BIIAB Level 4 NVQ Diploma in Management
- > 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

Organise and deliver customer service	
Unit Reference	L/506/2150
Level	3
Credit Value	5
Guided Learning (GL)	27
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to organise, plan and deliver customer service.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)
The learner will	The learner can
1. Understand how to organise customer service delivery	1.1 Explain how different methods of promoting products and/or services impact on customer service delivery 1.2 Explain who should be involved in the organisation of customer service delivery 1.3 Explain the importance of differentiating between customers' wants, needs and expectations 1.4 Explain different ways of segmenting customer groups 1.5 Explain how customer segmentation is used in organising customer service delivery 1.6 Explain how to analyse the "customer journey"
2. Be able to plan the delivery of customer service	2.1 Identify customers' needs and expectations 2.2 Map the "customer journey"

	<p>2.3</p> <p>2.4</p> <p>2.5</p> <p>2.6</p>	<p>Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service</p> <p>Prepare the resources needed to deliver products and/or services to different types of customers</p> <p>Plan how to deal with unexpected additional workloads</p> <p>Allocate priorities to address points of service failure</p>
<p>3. Be able to deliver customer service</p>	<p>3.1</p> <p>3.2</p> <p>3.3</p> <p>3.4</p>	<p>Take steps to ensure that the needs of customers are balanced with organisational objectives</p> <p>Agree realistic and achievable actions with customers</p> <p>Identify areas for improvement in their own customer service delivery</p> <p>Adapt their own customer service delivery to meet customers' changing expectations</p>

Understand the customer service environment

Unit Reference	Y/506/2152	
Level	3	
Credit Value	5	
Guided Learning (GL)	40	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge of the customer service environment.	
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.2)	
The learner will	The learner can	
1. Understand the concepts and practices underpinning customer service delivery	1.1	Explain the value of customer service as a competitive tool
	1.2	Explain the process of mapping the customer journey and its importance in delivering effective customer service
	1.3	Describe techniques used to identify service failures
	1.4	Explain the concept and importance of the service profit chain
	1.5	Describe methods of measuring organisational effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1	Explain the importance of a brand to customers and to an organisation
	2.2	Explain how branding can influence customers' perception of an organisation and its products and/or services
	2.3	Explain the potential impact of good and poor customer service on a brand

<p>3. Understand the structure of customer Service</p>	<p>3.1 3.2 3.3 3.4 3.5 3.6</p>	<p>Explain the features of different customer service models and customer service standards</p> <p>Explain the relationship between customer service and operational areas of an organisation</p> <p>Explain the relationship between customer service and continuous improvement processes</p> <p>Explain the costs and benefits of customer service to an organisation</p> <p>Explain the impact of organisational values on how customers create their expectations</p> <p>Explain how organisational values impact on meeting customer expectations</p>
<p>4. Understand the implications of legislation on customer service delivery</p>	<p>4.1 4.2</p>	<p>Explain the implications of consumer-related legislation on customer service delivery</p> <p>Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information</p>

Understand customers and customer retention	
Unit Reference	J/506/2910
Level	3
Credit Value	4
Guided Learning (GL)	35
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to understand customers and customer retention.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.3)
The learner will	The learner can
1. Understand Customer Relationship Management (CRM)	1.1 Explain the concept of the “customer experience” 1.2 Explain different methods of segmenting and characterising customers 1.3 Explain the purpose and scope of CRM 1.4 Describe the features of an effective CRM system 1.5 Explain the uses of CRM data in customer service delivery
2. Understand customer retention	2.1 Explain the term customer retention 2.2 Explain the benefits of customer retention to an organisation 2.3 Explain the factors that influence customer retention 2.4 Describe techniques used to attract and retain customers 2.5 Explain how to assess the extent of customer loyalty

	2.6	Explain the factors involved in customer Recovery
3. Understand the measurement of customer satisfaction	3.1	Describe techniques used to analyse performance data
	3.2	Explain the factors to be taken into account in setting performance targets and objectives
	3.3	Explain the features and uses of a range of techniques to measure customer satisfaction

Resolve customers' problems	
Unit Reference	K/506/2169
Level	3
Credit Value	4
Guided Learning (GL)	19
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to monitor and resolve customers' problems.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.9)
The learner will	The learner can
1. Understand the monitoring and resolution of customers' problems	1.1 Assess the suitability of a range of techniques for monitoring customer problems 1.2 Explain how to use the resolution of customers' problems to improve products and/or services 1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance 1.4 Explain the features of negotiating techniques used to resolve customers' problems
2. Be able to deal with customers' problems	2.1 Confirm the nature and cause of customers' problems 2.2 Explain when customers' problems should be treated as complaints 2.3 Explain the benefits to customers and the organisation of the options available to solve problems

	2.4	Explain the drawbacks to customers and the organisation of the options available to solve problems
	2.5	Explain to customers the options for resolving their problems
	2.6	Agree solutions that meet customers' and organisational requirements within their own levels of authority
	2.7	Inform colleagues of the nature of problems and actions taken
	2.8	Evaluate the effectiveness of the resolution of customers' problems
	2.9	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

Principles of business	
Unit Reference	D/506/1942
Level	3
Credit Value	10
Guided Learning (GL)	74
Unit Summary	The purpose of this unit is to provide the learner with the knowledge of the principles of business.
Learning Outcomes (1 to 5)	Assessment Criteria (1.1 to 5.5)
The learner will	The learner can
1. Understand business markets	1.1 Explain the characteristics of different business markets 1.2 Explain the nature of interactions between businesses within a market 1.3 Explain how an organisation's goals may be shaped by the market in which it operates 1.4 Describe the legal obligations of a business
2. Understand business innovation and growth	2.1 Define business innovation 2.2 Explain the uses of models of business innovation 2.3 Identify sources of support and guidance for business innovation 2.4 Explain the process of product or service development 2.5 Explain the benefits, risks and implications associated with innovation
3. Understand financial management	3.1 Explain the importance of financial viability for an organisation

	3.2	Explain the consequences of poor financial management
	3.3	Explain different financial terminology
4. Understand business budgeting	4.1	Explain the uses of a budget
	4.2	Explain how to manage a budget
5. Understand sales and marketing	5.1	Explain the principles of marketing
	5.2	Explain a sales process
	5.3	Explain the features and uses of market research
	5.4	Explain the value of a brand to an organisation
	5.5	Explain the relationship between sales and marketing

Manage personal and professional development

Unit Reference	T/506/2952	
Level	3	
Credit Value	3	
Guided Learning (GL)	12	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to manage personal and professional development.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)	
The learner will	The learner can	
1. Be able to identify personal and professional development requirements	1.1	Compare sources of information on professional development trends and their validity
	1.2	Identify trends and developments that influence the need for professional development
	1.3	Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
2. Be able to fulfil a personal and professional development plan	2.1	Evaluate the benefits of personal and professional development
	2.2	Explain the basis on which types of development actions are selected
	2.3	Identify current and future likely skills, knowledge and experience needs using skills gap analysis
	2.4	Agree a personal and professional development plan that is consistent with business needs and personal objectives

	2.5	Execute the plan within the agreed budget and timescale
	2.6	Take advantage of development opportunities made available by professional networks or professional bodies
3. Be able to maintain the relevance of a personal and professional development plan	3.1	Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
	3.2	Obtain feedback on performance from a range of valid sources
	3.3	Review progress toward personal and professional objectives
	3.4	Amend the personal and professional development plan in the light of feedback received from others

Optional Group B Unit Details

Develop resources to support consistency of customer service delivery	
Unit Reference	Y/506/2166
Level	3
Credit Value	5
Guided Learning (GL)	21
Unit Summary	This unit provides the learner with the knowledge to develop resources to support consistency of customer service delivery.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.5)
The learner will	The learner can
1. Understand how knowledge resources are used to support customer service delivery	1.1 Explain the structure of a customer service knowledge base 1.2 Explain the uses of a customer service knowledge base 1.3 Explain the use of customers' frequently asked questions to support customer service delivery 1.4 Explain the input and update routines for adding to the knowledge base 1.5 Explain the content requirements of resource materials and how they should be expressed
2. Be able to create and maintain a customer service knowledge base	2.1 Identify the information that should be included in a customer service knowledge base 2.2 Confirm that a knowledge base is kept up to date 2.3 Promote the contents and use of a knowledge base

<p>3. Be able to develop customer service resource materials</p>	<p>3.1 3.2 3.3 3.4 3.5</p>	<p>Describe the types of questions frequently asked by customers</p> <p>Identify the types of resources needed to support customer service delivery from an analysis of customer needs</p> <p>Identify who will use the resources and in what way</p> <p>Develop resources that meet organisational requirements</p> <p>Communicate the availability and nature of the resources to those who will use them</p>
--	--	---

Use service partnerships to deliver customer service

Unit Reference	D/506/2167	
Level	3	
Credit Value	3	
Guided Learning (GL)	20	
Unit Summary	This unit provides the learner with the knowledge to use service partnerships to deliver customer service.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.5)	
The learner will	The learner can	
1. Understand the use of a service partnership in customer service delivery	1.1	Explain the roles and responsibilities of the partners involved in a service chain
	1.2	Explain the advantages and limitations of using a service partnership
	1.3	Explain the use and value of formal and informal service level agreements
2. Understand ways of building relationships within a customer service partnership	2.1	Describe effective communication methods for dealing with service partners
	2.2	Explain how to develop positive relationships with service partners
	2.3	Describe negotiating techniques for dealing with service partners
	2.4	Describe actions that can be taken to resolve any conflict of interest with service partners
3. Be able to deliver customer service within a customer service partnership	3.1	Identify the levels of authority that exist within a service partnership
	3.2	Keep service partnership colleagues up to date with progress, developments and

		issues that might affect the quality of delivery
	3.3	Establish service procedures that are acceptable to all members of a service partnership
	3.4	Agree with service partners' priorities and resolutions relating to conflicts of interest
	3.5	Identify areas for improvement from the analysis of a range of sources of information

Resolve customers' complaints

Unit Reference	R/506/2151	
Level	3	
Credit Value	4	
Guided Learning (GL)	22	
Unit Summary	The purpose of this unit is to enable the learner to understand the monitoring and resolution of customers' complaints.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.9)	
The learner will	The learner can	
1. Understand the monitoring and resolution of customers' complaints	1.1	Assess the suitability of a range of monitoring techniques for customers' complaints
	1.2	Explain how to identify those complaints that should prompt a review of the service offer and service delivery
	1.3	Explain negotiating techniques used to resolve customers' complaints
	1.4	Explain conflict management techniques used in dealing with upset customers
	1.5	Explain organisational procedures for dealing with customer complaints
	1.6	Explain when to escalate customers' complaints
	1.7	Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
	1.8	Explain the advantages and limitations of offering compensation or replacement products and/or services

<p>2. Be able to deal with customers' complaints</p>	<p>2.1 Confirm the nature, cause and implications of customers' complaints</p> <p>2.2 Take personal responsibility for dealing with complaints</p> <p>2.3 Communicate in a way that recognises customers' problems and understands their points of view</p> <p>2.4 Explain the advantages and limitations of different complaint response options to customers</p> <p>2.5 Explain the advantages and limitations of different complaint response options to the organisation</p> <p>2.6 Keep customers informed of progress</p> <p>2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority</p> <p>2.8 Record the outcome of the handling of complaints for future reference</p> <p>2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints</p>
--	--

Gather, analyse and interpret customer feedback

Unit Reference	D/506/2170	
Level	3	
Credit Value	5	
Guided Learning (GL)	24	
Unit Summary	The purpose of this unit is to enable the learner to understand how to gather, analyse and interpret customer feedback.	
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.4)	
The learner will	The learner can	
1. Understand how to gather, analyse and interpret customer feedback	1.1	Describe methods of collecting data for customer research
	1.2	Explain random sampling techniques used to collect data
	1.3	Explain how to evaluate bias in non-random samples
	1.4	Explain the principles of questionnaire design
	1.5	Assess the suitability of a range of techniques to analyse customer feedback
	1.6	Explain techniques used to monitor the quality of data collected
	1.7	Explain the use of software to record and analyse customer feedback
	1.8	Explain the validation issues associated with customer feedback
	1.9	Explain the importance of anonymising comments from customers who do not wish to be identified

<p>2. Be able to plan the collection of customer feedback on customer service issues</p>	<p>2.1 2.2 2.3</p>	<p>Identify the objectives of collecting customer feedback</p> <p>Justify the reasons for selecting different data collection methods</p> <p>Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe</p>
<p>3. Be able to gather customer feedback</p>	<p>3.1 3.2 3.3</p>	<p>Collect customer feedback using the sampling frame identified in a customer service plan</p> <p>Record data in a way that makes analysis straightforward</p> <p>Verify that all data is handled in line with legal, organisational and ethical policies and procedures</p>
<p>4. Be able to analyse and interpret customer feedback to recommend improvements</p>	<p>4.1 4.2 4.3 4.4</p>	<p>Use data analysis methods to identify patterns and trends in customer feedback</p> <p>Use the findings of a data analysis to identify areas for improvement to customer service</p> <p>Present the findings of an analysis in the agreed format</p> <p>Recommend improvements in response to the findings of an analysis</p>

Monitor the quality of customer service interactions

Unit Reference	K/506/2172	
Level	3	
Credit Value	5	
Guided Learning (GL)	27	
Unit Summary	The purpose of this unit is to enable the learner to prepare and monitor the quality of customer service interactions.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)	
The learner will	The learner can	
1. Understand how to monitor the quality of customer service interactions	1.1	Describe techniques for monitoring the quality of customer service interactions
	1.2	Explain organisational procedures and guidelines for customer service delivery
	1.3	Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions
	1.4	Explain how to construct a representative sample of customer service interactions for monitoring purposes
	1.5	Explain how data protection legislation applies to monitoring the quality of customer service interactions
	1.6	Explain how monitoring actions taken can identify possible improvements in customer service interactions
	1.7	Explain techniques to gather customer feedback
2. Be able to prepare to monitor the quality of	2.1	Identify the criteria against which the quality of customer service interactions will be monitored

customer service interactions	2.2	Specify a sampling frame that would provide information to meet monitoring objectives
	2.3	Select monitoring techniques that are capable of collecting the required information
	2.4	Ensure that staff and customers are made aware of the fact that they will be monitored
3. Be able to monitor the quality of customer service interactions	3.1	Monitor the quality of customer service interactions with minimal disruption to business
	3.2	Assess the quality of customer service interactions against agreed criteria
	3.3	Identify patterns and trends in colleagues' performance
	3.4	Give constructive feedback to colleagues on the quality of customer service interactions

Communicate verbally with customers

Unit Reference	D/506/2119	
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 communicate verbally with customers.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.10)	
The learner will	The learner can	
1. Understand how to communicate verbally with customers	1.1	Explain the importance of effective communication in customer service
	1.2	Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
	1.3	Explain why “customer service language” is used
	1.4	Describe different questioning techniques that can be used when communicating with customers
	1.5	Describe verbal and non-verbal signals that show how a customer may be feeling
	1.6	Describe the types of information needed when communicating verbally with customers
2. Be able to use customer service language to communicate with customers	2.1	Identify customers’ wants and priorities
	2.2	Listen “actively” to what customers are saying

	2.3	Communicate clearly, concisely and professionally with customers
	2.4	Use a tone of voice and expression that reinforces messages when communicating with customers
	2.5	Use language that reinforces empathy with customers
	2.6	Adapt their response in accordance with customers' changing behaviour
	2.7	Provide information and advice that meets customers' needs
	2.8	Maintain organisational standards of behaviour and communication when interacting with customers
	2.9	Check that customers have understood what has been communicated
	2.10	Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

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

Promote additional products and/or services to customers

Unit Reference	L/506/2133	
Level	2	
Credit Value	2	
Guided Learning (GL)	14	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to promote additional products and/or services to customers.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.4)	
The learner will	The learner can	
1. Understand the promotion of additional products and/or services to customers	1.1	Describe organisational policies and procedures on the promotion of additional products and/or services
	1.2	Explain the importance of keeping product/service knowledge up to date
	1.3	Explain how to match products and/or services to customer needs
	1.4	Describe techniques to promote additional products and/or services
2. Be able to promote additional products and/or services to customers	2.1	Identify opportunities to promote additional products and/or services that are likely to improve the customer experience
	2.2	Promote the benefits of additional products and/or services that are likely to be of interest to customers
	2.3	Provide information to customers that will help them to decide whether to select additional products and/or services

	2.4	Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services
--	-----	--

Exceed customer expectations	
Unit Reference	Y/506/2135
Level	2
Credit Value	3
Guided Learning (GL)	15
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to exceed customer expectations.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)
The learner will	The learner can
1. Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive 1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3 Explain the types of actions that customers are likely to perceive as adding value 1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer
2. Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer 2.2 Explain the service offer clearly and concisely to customers 2.3 Identify options that offer added value without affecting other customers adversely 2.4 Make offers to customers within their own authority levels

	2.5	Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
	2.6	Record agreements made and actions taken

Deliver customer service whilst working on customers' premises

Unit Reference	T/506/2143	
Level	2	
Credit Value	4	
Guided Learning (GL)	20	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to deliver customer service whilst working on customers' premises.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.7)	
The learner will	The learner can	
1. Understand how to deliver customer service whilst working on customers' premises	1.1	Describe the preparations that need to be made prior to a visit
	1.2	Explain the importance of being positive about the product and/or service
	1.3	Explain organisational standards of presentation, behaviour and communication
	1.4	Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
	1.5	Explain how to identify possible risks relating to the work to be carried out
	1.6	Explain the way in which legislation affects the work to be carried out
2. Be able to deliver customer service whilst working on customers' premises	2.1	Identify themselves to customers
	2.2	Take action to ensure that customers know when, why and for how long work will be carried out on their premises
	2.3	Confirm with customers the nature of work to be carried out on their premises

	2.4	Keep customers informed of progress, delays, variations to work to be carried out and follow-up needed
	2.5	Treat customers, their premises and property with consideration
	2.6	Confirm that the customer is satisfied with the outcome
	2.7	Maintain their own personal safety and security and that of customers whilst on customers' premises

Deliver customer service to challenging customers

Unit Reference	F/506/2159	
Level	2	
Credit Value	3	
Guided Learning (GL)	16	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to deliver customer service to challenging customers.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.7)	
The learner will	The learner can	
1. Understand the delivery of customer service to challenging customers	1.1	Describe different types of challenging customers in the customer service environment
	1.2	Explain an organisation's procedures and standards of behaviour for dealing with challenging customers
	1.3	Explain behaviours that make it challenging to deal with customers
	1.4	Explain the difference between assertive and aggressive behaviour
	1.5	Describe techniques to deal with customers' challenging behaviour
	1.6	Explain their own levels of authority for agreeing actions outside the service offer
	1.7	Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters
2. Be able to deal with challenging customers	2.1	Identify the signs that indicate that a customer is challenging

	2.2	Express understanding of customers' point of view without admitting liability
	2.3	Explain to customers the limits of the service they can offer
	2.4	Explain to customers the reasons for an organisation's position and policy
	2.5	Agree a way forward that balances customer satisfaction and organisational needs
	2.6	Obtain help from colleagues when options for action are beyond their level of authority
	2.7	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Develop customer relationships	
Unit Reference	Y/506/2149
Level	2
Credit Value	3
Guided Learning (GL)	18
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to deliver customer relationships.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.5)
The learner will	The learner can
1. Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers 1.2 Explain the value of customer loyalty and retention 1.3 Explain how customers' expectations may change over time 1.4 Explain the use of customer feedback as a means of developing customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers 1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships

<p>2. Be able to develop relationships with customers</p>	<p>2.1 2.2 2.3 2.4 2.5</p>	<p>Give help and information that meets or exceeds customers' expectations</p> <p>Identify new ways of helping customers based on their feedback</p> <p>Share feedback from customers with others</p> <p>Identify added value that the organisation could offer customers</p> <p>Bring to customers' attention products or services that may interest them</p>
---	--	--

Support customer service improvements

Unit Reference	T/506/2160	
Level	2	
Credit Value	3	
Guided Learning (GL)	12	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to deliver customer relationships.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.3)	
The learner will	The learner can	
1. Understand how to support customer service improvements	1.1	Describe different sources of information that may help identify ways of improving customer service
	1.2	Describe the constraints on suggesting improvements to customer service
	1.3	Explain the limits of their own authority in implementing improvements
2. Be able to identify the potential for improvements to customer service	2.1	Use information from a range of sources to understand the customer experience
	2.2	Identify potential areas where customer service could be improved from an analysis of information
	2.3	Make recommendations for improvement that are based on evidence from analysed information
3. Be able to support the implementation of improvements to customer service	3.1	Implement agreed improvements within the limits of their own authority
	3.2	Inform customers of improvements to customer service

	3.3	Identify the impact of improvements to customer service and feedback to relevant people
--	-----	---

Support customers through real-time online customer service

Unit Reference	A/506/2161	
Level	2	
Credit Value	3	
Guided Learning (GL)	15	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to support customers through real-time online customer service.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)	
The learner will	The learner can	
1. Understand how to support customers through real-time online customer service	1.1	Explain how an organisation's online customer service system works
	1.2	Explain how to navigate their own customer service site
	1.3	Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services
	1.4	Explain how to adapt their own communication style to meet customers' ability to use online systems
2. Be able to establish the customer service support needed by customers	2.1	Identify customers' familiarity with the site
	2.2	Identify the difficulties faced by customers when navigating websites
	2.3	Identify the support for customers that will meet their needs
3. Be able to support online customer service in real-time	3.1	Step through screen sequences while the customer operates the system

	3.2	Communicate with customers in terms they can understand
	3.3	Inform customers of what is happening and why certain steps are required
	3.4	Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Support customers using self-service equipment

Unit Reference	H/506/2977	
Level	2	
Credit Value	3	
Guided Learning (GL)	18	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to support customers using self-service equipment.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)	
The learner will	The learner can	
1. Understand how to support customers using self-service equipment	1.1	Explain how the self-service equipment works
	1.2	Describe problems that are commonly encountered by customers when using self-service equipment
	1.3	Explain demonstration techniques to use when supporting customers using self-service equipment
	1.4	Explain organisational procedures for the use of equipment and fault reporting
2. Be able to identify the help needed by customers using self-service equipment	2.1	Identify signs that show when a customer is having difficulty with the self-service equipment
	2.2	Identify a style and level of intervention that meets customers' needs
3. Be able to help customers to use self-service equipment	3.1	Maintain a professional, polite and approachable manner while monitoring customers' use of equipment
	3.2	Use staff override functions to enable self-service equipment to be used by customers

	3.3	Explain to customers how to use the equipment and complete the transaction
	3.4	Report equipment-related errors and issues to the right person

Use social media to deliver customer service

Unit Reference	J/506/2163	
Level	2	
Credit Value	3	
Guided Learning (GL)	18	
Unit Summary	The purpose of this unit is to enable the learner to understand social media in a business environment and being able to deal with customers using social media.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.4)	
The learner will	The learner can	
1. Understand social media in a business environment	1.1	Explain how different social media platforms can be used for customer service
	1.2	Describe different audience groups for a range of social media platforms
	1.3	Explain the importance of monitoring customer posts in social media networks
	1.4	Explain organisational policy and guidelines for the use of social media for customer service purposes
	1.5	Explain the etiquette of communication within different social media platforms
	1.6	Explain the importance of security settings and how they are used on different social media platforms
	1.7	Identify the information that can be shared when colleagues are involved in exchanges using social media

<p>2. Be able to deal with customers using social media</p>	<p>2.1 2.2 2.3 2.4</p>	<p>Monitor social media to identify customer questions, requests and comments</p> <p>Make responses that are appropriate to posts made by customers on social media networks</p> <p>Take action to ensure that customers are satisfied before closing dialogue</p> <p>Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media</p>
---	------------------------------------	---

Provide post-transaction customer service

Unit Reference	K/506/2978	
Level	2	
Credit Value	5	
Guided Learning (GL)	22	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to provide post-transaction customer service.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)	
The learner will	The learner can	
1. Understand post-transaction customer service	1.1	Explain organisational policies and procedures for post-transaction customer service
	1.2	Explain the purposes and range of post-transaction activities
	1.3	Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
	1.4	Explain how legislation and regulation affect customers' rights
	1.5	Explain the advantages and disadvantages of post-transaction customer service programmes
2. Be able to provide post-transaction customer service	2.1	Implement a programme of planned post-transaction interventions in line with organisational guidelines
	2.2	Use unplanned opportunities post-transaction to provide customer service
	2.3	Identify reasons for contacting customers post-transaction

	2.4	Confirm customers' levels of satisfaction post-transaction
	2.5	Make recommendations to decision makers to enhance customer satisfaction
	2.6	Present a professional and helpful image

Champion Customer Service	
Unit Reference	D/506/2153
Level	4
Credit Value	4
Guided Learning (GL)	17
Unit Summary	This unit provides the learner with the knowledge to be able to champion customer service.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.7)
The learner will	The learner can
1. Understand how to champion customer service	1.1 Evaluate the importance of viewing operations from the customer’s viewpoint 1.2 Analyse the role of service partners in providing customer service 1.3 Evaluate the effectiveness of information collection systems and reports 1.4 Describe organisational decision-making processes and limits of their own authority 1.5 Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements 1.6 Describe activities that give added value to the service chain
2. Be able to identify the scope for improvements to customer service	2.1 Monitor customer service delivery to identify issues that are important to customer service 2.2 Analyse the implications of improvements to customer service

	2.3	Identify customer service issues relating to new products and/or services
	2.4	Identify the strategic and managerial implications of changes to customer service and the service offer
3. Be able to champion customer service	3.1	Promote the role of customer service within an organisation's operational plans
	3.2	Inform individual staff members about their role in championing customer service
	3.3	Promote the benefits of effective customer service
	3.4	Provide validated customer service advice and information to colleagues
	3.5	Support others to identify areas for improvement to customer service
	3.6	Monitor the effectiveness of advice and information given
	3.7	Take actions to ensure that customer service delivery meets agreed standards

Build and maintain effective customer relations

Unit Reference	R/506/2179	
Level	4	
Credit Value	6	
Guided Learning (GL)	25	
Unit Summary	This unit provides the learner with the knowledge to build and maintain effective customer relations.	
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.5)	
The learner will	The learner can	
1. Understand how to build effective relationships with customers	1.1	Analyse stakeholder mapping techniques
	1.2	Analyse the features of influencing techniques
	1.3	Explain how influencing techniques can be used to improve the relationship with customers
	1.4	Evaluate the benefits and value of relationships with customers and customer loyalty
	1.5	Explain how techniques to manage expectations are applied to the management of customers
	1.6	Explain different types of acceptable compromise
	1.7	Evaluate the benefits of adopting a "customer-centred" approach
2. Be able to determine the scope for building effective relationships with customers	2.1	Identify the customers with whom relationships should be developed

	2.2	Identify the interests and concerns of customers with whom relationships should be developed
3. Be able to develop effective relationships with customers	2.3	Evaluate the scope for and limitations of building relationships with different types of customer
4. Be able to review and improve relationships with customers	3.1	Behave in a way that creates mutual trust and respect
	3.2	Provide information and perform actions within agreed timescales
	3.3	Take account of feedback provided by customers
	3.4	Keep customers up to date with new products and/or services and developments
	3.5	Assess regularly the extent to which customers' expectations are met
	3.6	Use personal influence and authority to ensure that customer needs are met or exceeded
	4.1	Monitor customer relationships and developments
	4.2	Take action to ensure that others complete agreed actions within agreed timescales
	4.3	Address changes to customer service methods that may have an effect on customer relationships
	4.4	Collect feedback from customers on their levels of satisfaction
	4.5	Recommend improvements to customer service based on analyses of the effectiveness of customer relationships

Manage a customer service award programme	
Unit Reference	L/506/2181
Level	4
Credit Value	4
Guided Learning (GL)	15
Unit Summary	This unit provides the learner with the knowledge to plan and manage a customer service award programme.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.3)
The learner will	The learner can
1. Understand the management of a customer service award programme	1.1 Justify the reasons for an award programme 1.2 Explain how to make use of a customer service award programme as a promotional tool 1.3 Explain the likely impact of organisational culture on a customer service award programme 1.4 Explain the requirements of a business case for a customer service award programme
2. Be able to plan a customer service award programme	2.1 Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme 2.2 Evaluate the benefits, drawbacks and costs of different options for a customer service award programme 2.3 Select the option that best meets the objectives of the award programme

	2.4	Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales
	2.5	Develop award criteria
3. Be able to manage a customer service award programme	3.1	Promote the award programme with the dual purpose of motivating team members and engaging customers
	3.2	Take action to ensure that award winners are recognised in a way that demonstrates organisational commitment to excellent customer service
	3.3	Evaluate the effectiveness of a customer service award programme

Manage the use of technology to improve customer service

Unit Reference	Y/506/2183	
Level	4	
Credit Value	4	
Guided Learning (GL)	14	
Unit Summary	This unit provides the learner with the knowledge to manage the use of technology to improve customer service.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.5)	
The learner will	The learner can	
1. Understand how to manage the use of technology to improve customer service	1.1	Analyse developments in information and communication technology that relate to customer service
	1.2	Analyse the features, functions and implications of technology for customer service delivery
	1.3	Explain how to monitor the use of technology to improve customer service
2. Be able to identify opportunities for customer service improvement through the use of technology	2.1	Review the effectiveness of customer service delivery against agreed criteria
	2.2	Identify how customer service delivery could be improved by the introduction or adaptation of technology
	2.3	Assess the costs of changes in the use of technology to improve customer service delivery
	2.4	Make recommendations for changes in the use of technology through a costed business case

<p>3. Be able to implement changes in technology to improve customer service</p>	<p>3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business</p> <p>3.2 Update colleagues on the implementation and expected benefits of new technology</p> <p>3.3 Provide staff with training in the use of new technology</p> <p>3.4 Monitor the implementation of changes in the use of technology in line with the plan</p> <p>3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria</p>
--	---

Develop a social media strategy for customer service

Unit Reference	D/506/2962	
Level	4	
Credit Value	5	
Guided Learning (GL)	16	
Unit Summary	This unit provides the learner with the knowledge to develop a social media strategy for customer service.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.5)	
The learner will	The learner can	
1. Understand the development of a customer service social media strategy	1.1	Explain the role of social media within the organisation's customer service strategy
	1.2	Analyse the components and scope of a social media strategy and its links with other aspects of the organisation
	1.3	Explain the importance of marketing and brand values for the organisation's strategy
	1.4	Explain the functionality and features of external social media tools
	1.5	Analyse media management tools in relation to social networking
	1.6	Evaluate the way in which the organisation's use of social media contributes to business performance
2. Be able to develop a customer service social media strategy	2.1	Evaluate the factors affecting the development of a customer service social media strategy
	2.2	Assess the suitability of different methods of engaging customers using social media

	<p>2.3 Analyse competitor presence and activity in social media</p> <p>2.4 Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints</p> <p>2.5 Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks</p> <p>2.6 Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy</p>
<p>3. Be able to promote the benefits of social media networking to customer service</p>	<p>3.1 Evaluate the benefits and drawbacks of using social media for dissemination purposes</p> <p>3.2 Analyse the benefits and consequences of social media engagement with customers</p> <p>3.3 Promote on-going dialogue with customers through social networking</p> <p>3.4 Act as a social media "champion" within the organisation</p> <p>3.5 Analyse the risks attached to the use of social media</p>

Optional Group C Unit Details

Negotiate in a business environment	
Unit Reference	H/506/1912
Level	3
Credit Value	4
Guided Learning (GL)	18
Unit Summary	This unit provides the learner with the knowledge to understand and be able to prepare and carry out business negotiations.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)
The learner will	The learner can
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party

	2.6	Research the strengths and weaknesses of the other party
3. Be able to carry out business negotiations	3.1	Carry out negotiations within responsibility limits in a way that optimises opportunities
	3.2	Adapt the conduct of the negotiation in accordance with changing circumstances
	3.3	Maintain accurate records of negotiations, outcomes and agreements made
	3.4	Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Promote equality, diversity and inclusion in the workplace

Unit Reference	T/506/1820	
Level	3	
Credit Value	3	
Guided Learning (GL)	15	
Unit Summary	This unit provides the learner with the knowledge to promote equality, diversity and inclusion in the workplace.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.3)	
The learner will	The learner can	
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1	Explain the difference between equality, diversity and inclusion
	1.2	Explain the impact of equality, diversity and inclusion across aspects of organisational policy
	1.3	Explain the potential consequences of breaches of equality legislation
	1.4	Describe nominated responsibilities within an organisation for equality, diversity and inclusion
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1	Explain the different forms of discrimination and harassment
	2.2	Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
	2.3	Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
3. Be able to support equality, diversity and inclusion in the workplace	3.1	Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace

	3.2	Identify potential issues relating to equality, diversity and inclusion in the workplace
	3.3	Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

Manage team performance	
Unit Reference	A/506/1821
Level	3
Credit Value	4
Guided Learning (GL)	21
Unit Summary	This unit provides the learner with the knowledge to manage team performance.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.6)
The learner will	The learner can
1. Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance 1.2 Explain a range of quality management techniques to manage team performance 1.3 Describe constraints on the ability to amend priorities and plans
2. Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members 2.2 Allocate work on the basis of the strengths, competences and expertise of team members 2.3 Identify areas for improvement in team members' performance outputs and standards 2.4 Amend priorities and plans to take account of changing circumstances 2.5 Recommend changes to systems and processes to improve the quality of work
3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels

	3.2	Communicate individual and team objectives, responsibilities and priorities
	3.3	Use communication methods that are appropriate to the topics, audience and timescales
	3.4	Provide support to team members when they need it
	3.5	Agree with team members a process for providing feedback on work progress and any issues arising
	3.6	Review the effectiveness of team communications and make improvements

Manage individuals' performance	
Unit Reference	J/506/1921
Level	3
Credit Value	4
Guided Learning (GL)	20
Unit Summary	This unit provides the learner with the knowledge to manage an individual's performance.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.7)
The learner will	The learner can
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance 1.2 Explain how to identify causes of underperformance 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively 1.4 Explain how to address issues that hamper individuals' performance 1.5 Explain how to agree a course of action to address underperformance
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs 2.3 Apply motivation techniques to maintain morale

	2.4	Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards
	2.5	Monitor individuals' progress towards objectives in accordance with agreed plans
	2.6	Recognise individuals' achievement of targets and quality standards
	2.7	Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace

Collaborate with other departments

Unit Reference	M/506/1931	
Level	3	
Credit Value	3	
Guided Learning (GL)	14	
Unit Summary	This unit provides the learner with the knowledge to collaborate with other departments.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.2)	
The learner will	The learner can	
1. Understand how to collaborate with other departments	1.1	Explain the need for collaborating with other departments
	1.2	Explain the nature of the interaction between their own team and other departments
	1.3	Explain the features of effective collaboration
	1.4	Explain the potential implications of ineffective collaboration with other departments
	1.5	Explain the factors relating to knowledge management that should be considered when collaborating with other departments
2. Be able to identify opportunities for collaboration with other departments	2.1	Analyse the advantages and disadvantages of collaborating with other departments
	2.2	Identify with which departments collaborative relationships should be built
	2.3	Identify the scope for and limitations of possible collaboration

3. Be able to collaborate with other departments	3.1	Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements
	3.2	Work with other departments in a way that contributes to the achievement of organisational objectives

Negotiating, handling objections and closing sales

Unit Reference	F/502/8612	
Level	3	
Credit Value	4	
Guided Learning (GL)	22	
Unit Summary	This unit provides the learner with the knowledge to be able to negotiate, handle objections and close sales.	
Learning Outcomes (1 to 5)	Assessment Criteria (1.1 to 5.4)	
The learner will	The learner can	
1. Understand how to handle objections and negotiate with the customer	1.1	Describe the scope of authority and responsibility when dealing with objections
	1.2	Identify the resources available to counter the sales objections
	1.3	Describe how to plan and prepare for negotiation
	1.4	Describe how to use testimonials to progress a sale
	1.5	Explain the advantages and disadvantages of different methods of closing a sale
	1.6	Explain organisational procedures for documenting the negotiated sale
2. Be able to prepare for objections and negotiation with the customer	2.1	Identify possible sales objections and appropriate responses prior to dealing with the customer
	2.2	Confirm authorisation to negotiate
	2.3	Prepare a negotiation plan that is capable of providing a mutually acceptable outcome

<p>3. Be able to handle objections</p>	<p>3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques</p> <p>3.2 Identify and prioritise customers' concerns</p> <p>3.3 Provide evidence to the customer of the strengths of the organisation's products or services</p> <p>3.4 Confirm with the customer that the objection(s) have been overcome</p> <p>3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals</p>
<p>4. Be able to negotiate with the Customer</p>	<p>4.1 Carry out negotiations according to negotiation plan</p> <p>4.2 Promote the benefits of what is being offered to the customer</p> <p>4.3 Explain to the customer when and why no further adjustment is possible</p> <p>4.4 Obtain support to progress negotiation that is outside own level of authority</p>
<p>5. Be able to close the sale following negotiation</p>	<p>5.1 Apply a trial close in accordance with the negotiation plan</p> <p>5.2 Respond to any further objections and concerns</p> <p>5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities</p> <p>5.4 Summarise agreements made in accordance with organisational procedures and close the sale</p>

Obtaining and analysing sales related information

Unit Reference	R/502/8615	
Level	3	
Credit Value	4	
Guided Learning (GL)	24	
Unit Summary	This unit provides the learner with the knowledge to be able to negotiate, handle objections and close sales.	
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.6)	
The learner will	The learner can	
1. Understand the uses of sales-related information	1.1	Explain the importance of up-to-date information for sales planning purposes
	1.2	Explain the benefits and risks of using a range of information sources to support sales activities
	1.3	Explain the limitations of sales-related information
	1.4	Explain the importance of reviewing sales data requirements for current and future use
2. Understand how to use tools and methods to analyse sales-related information	2.1	Explain the advantages and disadvantages of different systems to gather sales-related information
	2.2	Explain how to use different software packages for analysing and presenting sales-related information
3. Be able to obtain sales-related information about customers, markets and competitors	3.1	Specify the information needed to develop an understanding of customers, competitors and markets
	3.2	Identify sources that are capable of providing the required information about

	3.3	<p>the organisation's markets, customers and competitors</p> <p>Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation</p>
4. Be able to use tools and methods to analyse sales-related information	4.1	<p>Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information</p> <p>Define the information needs of the target audience for different types of sales-related information</p> <p>Use the analytical protocols that are appropriate to the selected tools and methods</p> <p>Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information</p> <p>Validate the reliability and validity of the findings of the analysis</p> <p>Provide sales-related information to the target audience within the agreed timescale and budget</p>

Buyer behaviours in sales situations

Unit Reference	K/502/8622	
Level	3	
Credit Value	3	
Guided Learning (GL)	27	
Unit Summary	This unit provides the learner with the knowledge of buyer behaviours in sales meetings.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.4)	
The learner will	The learner can	
1. Understand the impact of different models of buyer behaviour on the sales cycle	1.1	Explain the consumer buying decision-making process
	1.2	Explain how the consumer buying decision-making process affects the sales cycle
	1.3	Describe the influences that affect the consumer decision-making process
	1.4	Explain the organisational buying decision-making process
	1.5	Explain how the organisational buying decision-making process affects the sales cycle
	1.6	Describe the influences that affect the organisational buying decision-making process
	1.7	Explain the impact of the different roles within the decision-making unit on the sales cycle
2. Be able to respond to the buyer at each stage of the decision-making process	2.1	Use the methods for contacting customers, influencers and decision-

		makers appropriate to different stages of the buying decision-making process
	2.2	Respond to different decision-makers in a sales situation in a way that is appropriate to their role
	2.3	Use objections as buying opportunities
	2.4	Confirm solution(s) offered meet the needs and wants of decision-makers

Manage incidents referred to a contact centre	
Unit Reference	K/503/0418
Level	3
Credit Value	6
Guided Learning (GL)	30
Unit Summary	This unit concerns being able to manage incidents through a contact centre, provide support to colleagues on incident management and understand management of incidents reported to a contact centre.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.6)
The learner will	The learner can
1. Be able to manage incidents through a contact centre	1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures 1.2 Select resources that are available to deal with reported incidents 1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures 1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures 1.5 Monitor the management of the incident in accordance with organizational procedures 1.6 Ensure that the correct decision paths have been followed to manage reported incidents

	1.7	Deal with queries and/or complaints about incident handling in accordance with organisational procedures
2. Be able to provide support to colleagues on incident management in a contact centre	2.1	Agree with colleagues the areas in which they need support and guidance in incident management
	2.2	Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs
	2.3	Identify actions to improve team performance in incident handling from a review of incident management results
3. Understand how to manage incidents reported to a contact centre	3.1	Explain the incident management services offered by the contact centre
	3.2	Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident
	3.3	Explain the importance of clear communication using the most appropriate channel with those dealing with incidents
	3.4	Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident
	3.5	Describe the strengths and weaknesses of different types of support for colleagues
	3.6	Explain the importance of reviewing incident management results

Lead direct sales activities in a contact centre team

Unit Reference	D/503/0397	
Level	3	
Credit Value	4	
Guided Learning (GL)	8	
Unit Summary	This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team.	
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.6)	
The learner will	The learner can	
1. Be able to carry out sales activities in a contact centre	1.1	Prepare for a direct sales activity in accordance with organisational procedures
	1.2	Establish customer wishes and needs
	1.3	Offer options to customers by linking their wishes and needs to products and/or services
	1.4	Adapt their sales style and techniques to mirror customer wishes and behaviour
	1.5	Close the sale by agreement with the customer during the customer contact
	1.6	Record the confirmed order in accordance with organisational procedures
	1.7	Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre
	1.8	Complete the authorisation or payment in accordance with organisational procedures

<p>2. Be able to analyse contact centre sales data</p>	<p>2.1 Collate sales data from direct sales activities in a format that enables data manipulation</p> <p>2.2 Analyse sales performance against market and customer trends</p> <p>2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan</p>
<p>3. Be able to lead a team involved in direct sales activities in a contact centre</p>	<p>3.1 Identify sales activities which are capable of fulfilling the sales plan</p> <p>3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling</p> <p>3.3 Monitor the team's sales performance against agreed targets</p> <p>3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach</p> <p>3.5 Provide encouragement and guidance to team colleagues during sales activities</p>
<p>4. Understand sales activities in a contact centre team</p>	<p>4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain the organisational and regulatory requirements of direct sales activities</p> <p>4.3 Explain the techniques for overcoming objections and questions from customers during sales activities</p> <p>4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective</p> <p>4.5 Explain the importance of setting a good example in a contact centre team</p>

	4.6	Explain how to set sales targets including cross-selling and upselling
--	-----	--

Manage diary systems	
Unit Reference	L/506/1807
Level	2
Credit Value	2
Guided Learning (GL)	12
Unit Summary	The purpose of this unit is to enable the learner to understand the management and be able to manage diary systems.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.6)
The learner will	The learner can
1. Understand the management of diary systems	1.1 Explain the importance of keeping diary systems up to date 1.2 Describe the basis on which bookings and changes are prioritised 1.3 Explain any constraints relating to making bookings for people or facilities 1.4 Describe the types of problems that can occur when managing diaries
2. Be able to manage diary systems	2.1 Obtain the information needed to make diary entries 2.2 Make accurate and timely diary entries 2.3 Respond to changes in a way that balances and meets the needs of those involved 2.4 Communicate up-to-date information to everyone involved 2.5 Keep diaries up to date 2.6 Maintain the requirements of confidentiality

Contribute to the organisation of an event	
Unit Reference	L/506/1869
Level	2
Credit Value	3
Guided Learning (GL)	23
Unit Summary	The purpose of this unit is to enable the learner to be able to carry out pre-event actions, set up an event and carry out post-event actions.
Learning Outcomes (1 to 4)	Assessment Criteria (1.1 to 4.2)
The learner will	The learner can
1. Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event 1.2 Explain the purpose and features of different types of events 1.3 Describe the type of resources needed for different types of events 1.4 Describe the different needs attendees may have and how to meet these 1.5 Explain the requirements of health, safety and security when organising events 1.6 Describe the types of problems that may occur during events and how to deal with them
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event 2.2 Obtain resources within the agreed timescales 2.3 Distribute pre-event documentation to delegates in accordance with the event plan

	2.4	Co-ordinate attendee responses within the agreed timescale
	2.5	Identify any special requirements of event attendees
3. Be able to set up an event	3.1	Set up layout and resources in accordance with the event plan
	3.2	Confirm that all identified resources are in place and meet requirements
	3.3	Behave in a way that maintains organisational values and standards
4. Be able to carry out post-event actions	4.1	Ensure the venue is restored to the required conditions in accordance with the terms of the contract
	4.2	Carry out follow-up actions in accordance with the event plan and agreements made at the event

Provide reception services	
Unit Reference	H/506/1814
Level	2
Credit Value	3
Guided Learning (GL)	15
Unit Summary	The purpose of this unit is to enable the learner to understand and then provide reception services.
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.7)
The learner will	The learner can
1. Understand reception services	1.1 Explain the receptionist's role in representing an organisation 1.2 Explain an organisation's structure and lines of communication 1.3 Describe an organisation's standards of presentation 1.4 Explain the health, safety and security implications of visitors to a building 1.5 Explain how to deal with challenging people
2. Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards 2.2 Direct visitors to the person they are visiting in accordance with organisational standards 2.3 Record visitors' arrivals and departures in accordance with organisational procedures 2.4 Provide advice and accurate information within organisational guidelines on confidentiality

	2.5	Keep the reception area tidy and materials up to date
	2.6	Answer and deal with telephone calls within organisational standards
	2.7	Adhere to organisational procedures on entry, security, health and safety

Buddy a colleague to develop their skills

Unit Reference	M/506/1895	
Level	2	
Credit Value	3	
Guided Learning (GL)	19	
Unit Summary	The purpose of this unit is to enable the learner to understand how to buddy a colleague and be able to plan to buddy and also support a buddy colleague.	
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.6)	
The learner will	The learner can	
1. Understand how to buddy a colleague	1.1	Describe what is expected of a buddy
	1.2	Explain techniques to give positive feedback and constructive criticism
	1.3	Explain techniques to establish rapport with a buddy
2. Be able to buddy a colleague	2.1	Agree which aspects of a colleague's work may benefit from buddying
	2.2	Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
	2.3	Agree a schedule of meetings that minimise disruption to business
	2.4	Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3. Be able to support a buddy colleague carrying out work activities	3.1	Remain unobtrusive while a buddy colleague carries out their work activities

	3.2	Provide examples of how to carry out tasks correctly
	3.3	Identify instances of good practice and areas for improvement through observation
	3.4	Praise a buddy colleague on well completed tasks
	3.5	Give constructive feedback on ways in which a buddy could improve performance
	3.6	Offer a buddy hints and tips based on personal experience

Employee rights and responsibilities

Unit Reference	L/506/1905	
Level	2	
Credit Value	2	
Guided Learning (GL)	16	
Unit Summary	This unit provides the learner with the knowledge to understand the role of organisations and industries and the employers' expectations and employers' rights and obligations.	
Learning Outcomes (1 to 2)	Assessment Criteria (1.1 to 2.4)	
The learner will	The learner can	
1. Understand the role of organisations and industries	1.1	Explain the role of their own occupation within an organisation and industry
	1.2	Describe career pathways within their organisation and industry
	1.3	Identify sources of information and advice on an industry, occupation, training and career pathway
	1.4	Describe an organisation's principles of conduct and codes of practice
	1.5	Explain issues of public concern that affect an organisation and industry
	1.6	Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers' expectations and employees' rights and obligations	2.1	Describe the employer and employee statutory rights and responsibilities that affect their own role

	2.2	Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
	2.3	Describe the procedures and documentation that protect relationships with employees
	2.4	Identify sources of information and advice on employment rights and responsibilities

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

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

Bespoke Software	
Unit Reference	J/502/4397
Level	3
Credit Value	4
Guided Learning (GL)	30
Unit Summary	This unit provides the learner with the knowledge to use bespoke applications to retrieve information efficiently and process and present information effectively.
Learning Outcomes (1 to 3)	Assessment Criteria (1.1 to 3.4)
The learner will	The learner can
1. Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications
2. Create and modify appropriate structures to organise and retrieve information efficiently	2.1 Evaluate the use of software functions to structure, layout and style information 2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently 2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available
3. Exploit the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, analyse and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary

	3.3	Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
	3.4	Select and use presentation methods to aid clarity and meaning

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.