Qualification Guidance Document

BIIAB Level 2 Diploma in Customer Service

England – 601/3734/4

About Us

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

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

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

Sources of Additional Information

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

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Specification Code

The specification code is D5075-02.

Issue	Date	Details of change
1.3	December 2015	RoC - Minimum GLH RoC – Assessment method for B&A39

1.4	January 2018	Updated throughout to remove reference to "QCF" RoC updated with TQT figures
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
1.8	May 2026	Updated Review Date to 28/02/2026

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

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

Qualification Summary

BIIAB Level 2 Diploma in Customer Service								
Qualification Purpose	To allow learners to obtain and then demonstrate the skills and knowledge to work at an operational level in the Customer Service, with some autonomy and some supervision							
Age Range	Pre 16		16-18	✓	18+		19+	✓
Regulation	The above qualification is regulated by: > Ofqual > Qualification Wales > CCEA Regulation							
Assessment	> Portfolio of Evidence > Practical Demonstration/Assignment							
Type of Funding Available	See FaLA (Find a Learning Aim)							
Grading	Pass/Fail To achieve a Pass grade, learners **must** achieve all the Learning Outcomes and Assessment Criteria in all the units completed							
Operational Start Date	01/09/2014							
Review Date	28/02/2026							
Operational End Date								
Certification End Date								
Guided Learning (GL)	254 hours							
Total Qualification Time (TQT)	450 hours							
Credit Value	45							
BIIAB Qualifications Limited Sector	Business Support							

Regulator Sector	15.2 Administration
Support from Trade Associations	

Introduction

BIIAB Qualifications Limited is regulated to deliver this qualification by Ofqual in England. The qualification has a unique Qualification Number (QN) which is shown below. Each unit within the qualification will also have a regulatory Unit Reference Number (URN).

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

Qualification Title	Qualification Number (QN)
BIIAB Level 2 Diploma in Customer Service	601/3734/4

Pre-requisites

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

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

Qualification Structure and Rules of Combination

Qualification Title: BIIAB Level 2 Diploma in Customer Service

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

- Mandatory Group A **minimum** credit: **19**
- Optional Groups B, C and D **minimum** credit: **26**. This must consist of:
  - Optional Group B **minimum** credit: **3**
  - Optional Group C **minimum** credit: **16**
  - Optional Group D **maximum** credit: **7**

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 – 19				
Deliver customer service	A/506/2130 CS7	2	5	27
Understand customers	F/506/2131 CS8	2	2	17
Principles of customer service	J/506/2132 CS9	2	4	34
Understand employer organisations	A/506/1964 BA38	2	4	40
Manage personal performance and development	L/506/1788 ML1	2	4	18

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group B Minimum Credit Target – 3				
Communicate verbally with customers	D/506/2119 CS5	2	3	14
Communicate verbally with customers	T/506/2126 CS6	2	3	20

Unit Title	Unit Number	Level	Credit Value	GL
Optional Group C Minimum Credit Target – 16				
Deal with incoming telephone calls from customers	H/506/2154 CS10	2	3	16
Make telephone calls to customers	K/506/2155 CS11	2	3	16
Promote additional products and/or services to customers	L/506/2133 CS12	2	2	14

Process information about customers	R/506/2134 CS13	2	3	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
Carry out customer service handovers	T/506/2157 CS16	2	3	15
Resolve customer service problems	A/506/2158 CS17	2	5	22
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
Resolve customers' complaints	R/506/2151 CS31	3	4	22
Gather, analyse and interpret customer feedback	D/506/2170 CS32	3	5	24

Unit Title	Unit Number	Level	Credit Value	GL

Optional Group D Minimum Credit Target – 7				
Health and safety procedures in the workplace	T/505/4673 CFAQ3	2	2	16
Manage diary systems	L/506/1807 BA13	2	2	12
Provide reception services	H/506/1814 BA19	2	3	15
Contribute to the organisation of an event	L/506/1869 BA27	2	3	23
Buddy a colleague to develop their skills	M/506/1895 BA35	2	3	19
Employee rights and responsibilities	L/506/1905 BA39	2	2	16
Develop working relationships with colleagues	R/506/1789 ML2	2	3	19
Principles of equality and diversity in the workplace	J/506/1806 ML7	2	2	10
Processing sales orders	M/502/8587 CFAQ4	2	2	17
Meeting customers' after sales needs	R/502/8601 CFAQ5	2	3	14
Handling objections and closing sales	M/502/8606 CFAQ6	2	3	22
Deal with incidents through a contact centre	K/503/0421 CC38	2	7	40
Carry out direct sales activities in a contact centre	L/503/0394 CC19	2	5	15
Negotiate in a business environment	H/506/1912 BA42	3	4	18
Bespoke Software	F/502/4396 CFAQ9	2	3	20

Aim

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

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

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.skillscfa.org.

Skills CFA assessment strategy

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

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

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

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.

- be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.

- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process. It is the responsibility of approved centres to select and appoint assessors.

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

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

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

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

IQAs **must**:

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

OR

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

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

EQAs **must**:

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

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA and should be supported by a qualified EQA throughout their training period.

- be 'occupationally competent'. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified and know how they are applied in business.

- demonstrate competent practice in external verification of assessment and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process. It is the responsibility of the awarding organisation to select and appoint EQAs.

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

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

Achievement of the qualification offers opportunities for progression, including:

- BIIAB Level 3 Diploma in Customer Service
- BIIAB Level 3 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

Deliver customer service		
Unit Reference	A/506/2130	
Level	2	
Credit Value	5	
Guided Learning (GL)	27	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to deliver customer service.	
Learning Outcomes (1 to 5)	**Assessment Criteria (1.1 to 5.2)**	
The learner will	**The learner can**	
1. Understand customer service delivery	1.1	Explain the relationship between customers' needs and expectations and customer satisfaction
	1.2	Describe the features and benefits of an organisation's products and/or services
	1.3	Explain the importance of treating customers as individuals
	1.4	Explain the importance of balancing promises made to customers with the needs of an organisation
	1.5	Explain when and to whom to escalate problems
	1.6	Describe methods of measuring their own effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1	Explain the importance of a brand to an Organisation
	2.2	Explain how a brand affects an organisation's customer service offer

	2.3	Explain the importance of using customer service language that supports a brand promise
	2.4	Identify their own role in ensuring that a brand promise is delivered
3. Be able to prepare to deal with customers	3.1	Keep up to date with an organisation's products and/or services
	3.2	Prepare resources that are necessary to deal with customers before starting work
4. Be able to prepare to deal with customers	4.1	Maintain organisational standards of presentation and behaviour when providing customer service
	4.2	Adapt their own behaviour to meet customers' needs or expectations
	4.3	Respond to customers' requests in line with organisational guidelines
	4.4	Inform customers of the progress of their requests
	4.5	Confirm that customers' expectations have been met in line with the service offer
	4.6	Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5. Be able to support improvements to customer service delivery	5.1	Identify ways that customer service could be improved for an organisation and individuals
	5.2	Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Understand customers		
Unit Reference	F/506/2131	
Level	2	
Credit Value	2	
Guided Learning (GL)	7	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to understand and value customers.	
Learning Outcomes (1 to 2)	**Assessment Criteria (1.1 to 2.5)**	
The learner will	**The learner can**	
1. Understand different types of customers	1.1	Explain the distinctions between internal and external customers
	1.2	Explain how cultural factors can affect customers' expectations
	1.3	Describe the characteristics of challenging customers
	1.4	Explain how to identify dissatisfied customers
2. Understand the value of customers and their loyalty	2.1	Explain how the achievement of the customer service offer contributes to enhancing customer loyalty
	2.2	Explain the relationship between customer satisfaction and organisational performance
	2.3	Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services
	2.4	Explain the potential consequences of customers' dissatisfaction

	2.5	Describe different methods of attracting customers and retaining their loyalty

Principles of customer service		
Unit Reference	J/506/2132	
Level	2	
Credit Value	4	
Guided Learning (GL)	34	
Unit Summary	The purpose of this unit is to provide the learner with the principles of customer service.	
Learning Outcomes (1 to 4)	**Assessment Criteria (1.1 to 4.5)**	
The learner will	**The learner can**	
1. Understand customer service	1.1	Explain the purpose and scope of customer service
	1.2	Define the term "service offer"
	1.3	Explain the value of a "service offer" to an organisation
	1.4	Explain the importance of delivering consistently high-quality customer service
	1.5	Explain the importance of keeping up to date with knowledge of competitors' activities
	1.6	Explain barriers to providing effective customer service
	1.7	Describe the features of effective follow-up service
2. Understand how legal and ethical requirements relate to customer service	2.1	Describe how sales and consumer-related legislation and regulations affect the delivery of customer service
	2.2	Describe how health, safety and environmental legislation affects customer service delivery

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

Understand employer organisations		
Unit Reference	A/506/1964	
Level	2	
Credit Value	4	
Guided Learning (GL)	40	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge of organisational structures and environment.	
Learning Outcomes (1 to 2)	**Assessment Criteria (1.1 to 2.3)**	
The learner will	**The learner can**	
1. Understand organisational structures	1.1	Explain the differences between the private sector, public sector and voluntary sector
	1.2	Explain the functions of different organisational structures
	1.3	Describe the features of different types of legal structures for organisations
2. Understand organisational environment	2.1	Describe the internal and external influences on organisations
	2.2	Explain the use of different models of analysis in understanding the organisational environment
	2.3	Explain why change in the business environment is important

Manage personal performance and development		
Unit Reference	L/506/1788	
Level	2	
Credit Value	4	
Guided Learning (GL)	18	
Unit Summary	The purpose of this unit is to provide the learner with the knowledge to manage their own personal development and performance.	
Learning Outcomes (1 to 4)	**Assessment Criteria (1.1 to 4.5)**	
The learner will	**The learner can**	
1. Be able to manage personal performance	1.1	Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
	1.2	Agree criteria for measuring progress and achievement with line manager
	1.3	Complete tasks to agreed timescales and quality standards
	1.4	Report problems beyond their own level of competence and authority to the appropriate person
	1.5	Take action needed to resolve any problems with personal performance
2. Be able to manage their own time and workload	2.1	Plan and manage workloads and priorities using time management tools and techniques
	2.2	Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives

	2.3	Explain the benefits of achieving an acceptable "work-life balance"
3. Be able to identify their own development needs	3.1	Identify organisational policies relating to personal development
	3.2	Explain the need to maintain a positive attitude to feedback on performance
	3.3	Explain the potential business benefits of personal development
	3.4	Identify their own preferred learning style(s)
	3.5	Identify their own development needs from analyses of the role, personal and team objectives
	3.6	Use feedback from others to identify their own development needs
	3.7	Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs
4. Be able to fulfil a personal development plan	4.1	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
	4.2	Make use of formal development opportunities that are consistent with business needs
	4.3	Use informal learning opportunities that contribute to the achievement of personal development objectives
	4.4	Review progress against agreed objectives and amend plans accordingly
	4.5	Share lessons learned with others using agreed communication methods

Optional Group B Unit Details

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

Optional Group C Unit Details

Deal with incoming telephone calls from customers		
Unit Reference	H/506/2154	
Level	2	
Credit Value	3	
Guided Learning (GL)	16	
Unit Summary	This unit provides the learner with the knowledge to understand how to deal with incoming telephone calls from customers and dealing with their questions and requests.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.5)**	
The learner will	**The learner can**	
1. Understand how to deal with incoming customer calls	1.1	Explain why an organisation should have guidance on dealing with telephone calls
	1.2	Explain why an organisation should have an identity checking process
	1.3	Explain the importance of keeping customer information up to date
	1.4	Explain the importance of keeping customers informed of the progress of their call
	1.5	Describe how body language and facial expressions can be detected over the telephone
	1.6	Describe different questioning techniques used when dealing with incoming calls
	1.7	Explain how to handle abusive calls
2. Be able to establish the purpose of incoming customer calls	2.1	Verify the identity of callers in line with organisational guidelines

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

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

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

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

Process information about customers		
Unit Reference	R/506/2134	
Level	2	
Credit Value	3	
Guided Learning (GL)	14	
Unit Summary	The purpose of this unit is to enable the learner to understand and be able to process information about customers.	
Learning Outcomes (1 to 2)	**Assessment Criteria (1.1 to 2.6)**	
The learner will	**The learner can**	
1. Understand how to process customer information	1.1	Describe the functions of customer information systems
	1.2	Explain the way in which legislation and regulatory requirements affect the processing of customer information
	1.3	Explain different responsibilities and levels of authority for processing customer service information
	1.4	Explain the reliability of sources of customer information
	1.5	Explain the validity of customer information
2. Be able to process customer information	2.1	Record information about customers in line with organisational standards and procedures
	2.2	Keep customer information up to date
	2.3	Respond to requests for customer information from authorised people in a timely manner

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

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

Carry out customer service handovers		
Unit Reference	T/506/2157	
Level	2	
Credit Value	3	
Guided Learning (GL)	15	
Unit Summary	The purpose of this unit is to enable the learner to carry out customer service handovers.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.5)**	
The learner will	**The learner can**	
1. Understand the customer service handover process	1.1	Explain an organisation's customer service handover procedures
	1.2	Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
	1.3	Explain why, when and how to set reminders to follow up on actions handed over to others
	1.4	Explain levels of their own responsibility in the customer service handover process
2. Be able to plan customer service handovers	2.1	Identify the steps in the customer service delivery process that rely on exchanges of information among team members
	2.2	Agree with colleagues when to pass customer service issues from one person to another
	2.3	Agree methods of information exchange
3. Be able to carry out customer service handovers	3.1	Explain to customers to whom and why a handover is being made
	3.2	Exchange information with colleagues in line with organisational procedures

	3.3	Check that actions required by others following handovers have been completed
	3.4	Identify further actions when the activities required by others have not been completed
	3.5	Share feedback with colleagues to make improvements to handover processes

Resolve customer service problems		
Unit Reference	A/506/2158	
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 resolve customer service problems.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.2)**	
The learner will	**The learner can**	
1. Understand the resolution of customer service problems	1.1	Describe the organisation's customer service and complaints procedures
	1.2	Describe techniques to identify customer service problems and their causes
	1.3	Describe techniques to deal with situations where customers become agitated or angry
	1.4	Explain the limits of their own authority for resolving customers' problems and making promises
	1.5	Explain the purpose of encouraging customers to provide feedback
	1.6	Describe methods used to encourage customers to provide feedback
2. Be able to resolve customer service problems	2.1	Identify the nature and cause of customer service problems
	2.2	Identify workable options for resolving problems within organisational guidelines
	2.3	Use the most appropriate method of communication for dealing with customers

	2.4	Agree with customers the option that best meets their needs and those of the organisation
	2.5	Keep customers informed of progress
	2.6	Fulfil promises made to customers during the resolution process
	2.7	Share customer feedback with others to improve the resolution of customer service problems
	2.8	Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
3. Be able to manage unresolved customer service problems	3.1	Explain to customers the reasons why problems cannot be resolved
	3.2	Refer customers to other sources of help if their problems cannot be resolved

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

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

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 3.4	Explain to customers how to use the equipment and complete the transaction 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

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

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

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

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

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

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

Optional Group D Unit Details

Health and safety procedures in the workplace		
Unit Reference	T/505/4673	
Level	2	
Credit Value	2	
Guided Learning (GL)	16	
Unit Summary	The purpose of this unit is to enable the learner to understand health and safety procedures and be able to carry out tasks with regard to health and safety in the workplace.	
Learning Outcomes (1 to 2)	**Assessment Criteria (1.1 to 2.4)**	
The learner will	**The learner can**	
1. Know health and safety procedures in the workplace	1.1	Define the main responsibilities for health and safety in the workplace of the following: > employers > employees
	1.2	Describe two health and safety laws affecting the workplace
	1.3	Define the importance of following health and safety procedures in the workplace
	1.4	Define the types of information or support available in relation to a specified aspect of health and safety in the workplace
2. Be able to carry out tasks with regard to health and safety in the workplace	2.1	Carry out a risk assessment of a specified workplace activity
	2.2	Use equipment or tools safely in the Workplace
	2.3	Describe how to prevent accidents in the Workplace

	2.4	Assess how own health and safety practices could be improved

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

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

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

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

Develop working relationships with colleagues		
Unit Reference	R/506/1789	
Level	2	
Credit Value	3	
Guided Learning (GL)	19	
Unit Summary	This unit provides the learner with the knowledge to develop working relationships with colleagues.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.4)**	
The learner will	**The learner can**	
1. Understand the principles of effective team working	1.1	Outline the benefits of effective team working
	1.2	Describe how to give feedback constructively
	1.3	Explain conflict management techniques that may be used to resolve team conflicts
	1.4	Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
	1.5	Explain the importance of warning colleagues of problems and changes that may affect them
2. Be able to maintain effective working relationships with colleagues	2.1	Recognise the contribution of colleagues to the achievement of team objectives
	2.2	Treat colleagues with respect, fairness and courtesy
	2.3	Fulfil agreements made with colleagues
	2.4	Provide support and constructive feedback to colleagues

3. Be able to collaborate with colleagues to resolve problems	3.1	Take others' viewpoints into account when making decisions
	3.2	Take ownership of problems within own level of authority
	3.3	Take action to minimise disruption to business activities within their own level of authority
	3.4	Resolve problems within their own level of authority and agreed contribution

Principles of equality and diversity in the workplace		
Unit Reference	J/506/1806	
Level	2	
Credit Value	2	
Guided Learning (GL)	10	
Unit Summary	This unit provides the learner with the knowledge to understand the principles of equality and diversity in the workplace.	
Learning Outcomes (1 to 2)	**Assessment Criteria (1.1 to 2.3)**	
The learner will	**The learner can**	
1. Understand the implications of equality legislation	1.1	Define the concept 'equality and diversity'
	1.2	Describe the legal requirements for equality of opportunity
	1.3	Describe the role and powers of organisations responsible for equality
	1.4	Explain the benefits of equal opportunities and diversity
	1.5	Explain the potential consequences for an organisation of failing to comply with equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1	Explain how organisational policies on equality and diversity translate into day-to-day activity in the workplace
	2.2	Describe their own responsibilities for equality and diversity in the workplace
	2.3	Describe behaviours that support equality, diversity and inclusion in the workplace

Processing sales orders		
Unit Reference	M/502/8587	
Level	2	
Credit Value	2	
Guided Learning (GL)	17	
Unit Summary	The purpose of this unit is to enable the learner to be able to process and follow up sales orders.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.3)**	
The learner will	**The learner can**	
1. Understand how to process and follow up sales orders	1.1	Explain the importance of sales order processing
	1.2	Describe organisational processes for ordering products and/or services
	1.3	Describe different sources of information used to check customer credit
	1.4	Describe the different payment methods accepted by sales orientated organisations
	1.5	Explain the role of the despatch function
	1.6	Describe service standards relating to sales order completion
	1.7	Explain the importance of storing information securely
2. Be able to process sales orders	2.1	Identify customer sales order requirements
	2.2	Check that the credit status of the customer meets organisational standards
	2.3	Confirm the availability of products and/or services to the customer

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

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

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

Handling objections and closing sales		
Unit Reference	M/502/8606	
Level	2	
Credit Value	3	
Guided Learning (GL)	22	
Unit Summary	The purpose of this unit is to enable the learner to handle sales and close the sale.	
Learning Outcomes (1 to 4)	**Assessment Criteria (1.1 to 4.3)**	
The learner will	**The learner can**	
1. Understand how to handle sales objections	1.1	Explain the difference between standard and non-standard sales objections
	1.2	Explain how to clarify objections and identify potential sales opportunities from them
	1.3	Describe how to use questioning techniques to explore and resolve customer issues
	1.4	Explain how to empathise with and reassure the customer
	1.5	Explain the difference between hypothetical and real objections
	1.6	Explain how knowledge of products and services can be used to answer objections
	1.7	Explain how competitor activity may affect the potential sale
	1.8	Describe how industry/sector pricing structures may have an impact on sales objections

	1.9	Explain the scope of authority and responsibility when dealing with objections
	1.10	State who to go to when in need of support to overcome objections
2. Understand how to close the sale	2.1	Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale
	2.2	Explain how to perform a trial close
	2.3	Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
	2.4	Explain potential barriers to closing the sale
	2.5	Explain a range of ways to close the sale
3. Be able to handle objections	3.1	Clarify the nature and extent of objections
	3.2	Explain to the customer the concessions available within the scope of authority
	3.3	Follow organisational procedures for dealing with objections
	3.4	Promote the benefits of products and/or services to overcome objections
	3.5	Use testimonials to overcome objections
	3.6	Refer to those in authority when dealing with objections outside the scope of own authority
4. Be able to close the sale	4.1	Perform a trial close and ask for the order when objections have been met
	4.2	Make use of add-on, up-selling or cross-selling opportunities

	4.3	Follow organisational procedures for accepting confirmation of an order

Deal with incidents through a contact centre		
Unit Reference	K/503/0421	
Level	2	
Credit Value	7	
Guided Learning (GL)	40	
Unit Summary	This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre.	
Learning Outcomes (1 to 3)	**Assessment Criteria (1.1 to 3.8)**	
The learner will	**The learner can**	
1. Be able to deal with incidents through a contact centre	1.1	Respond to incoming calls in a calm and professional manner
	1.2	Maintain control of the conversation
	1.3	Record the contact and information in an incident log in accordance with organisational procedures
	1.4	Assess and prioritise reported incidents in accordance with organisational procedures
	1.5	Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures
	1.6	Provide information, advice and support in response to requests in accordance with organisational procedures
	1.7	Escalate incident responses in accordance with organisational procedures

2. Be able to use contact centre communications systems to deploy incident management resources	2.1	Communicate with external organisations in accordance with organisational procedures
	2.2	Use the most efficient means (voice or data options) to communicate with those dealing with the incident
	2.3	Use agreed conventions of wording, style and approach appropriate for different communication media
3. Understand how to deal with incidents in a contact centre	3.1	Describe the incident management services offered by the contact centre
	3.2	Describe the impact of regulation or legislation on incident management
	3.3	Describe the purpose and use of decision trees
	3.4	Describe how to determine the appropriate allocation of resources to incidents
	3.5	Describe the boundaries of a contact incident that justify actions being escalated to different levels of response
	3.6	Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
	3.7	Describe standard wording and codes used by the organisation when dealing with incident management
	3.8	Describe the type and extent of resources available for deployment in incident management

Carry out direct sales activities in a contact centre		
Unit Reference	L/503/0394	
Level	2	
Credit Value	5	
Guided Learning (GL)	15	
Unit Summary	This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.	
Learning Outcomes (1 to 5)	**Assessment Criteria (1.1 to 5.8)**	
The learner will	**The learner can**	
1. Be able to gather information needed for direct sales activities in a contact centre	1.1	Assemble information about products and/or services that support direct sales
	1.2	Obtain from customers sufficient information to support direct sales activities
	1.3	Create sales opportunities by making links between information provided by customers and products and/or services
	1.4	Find potential new customers for products and/or services
2. Be able to carry out direct sales to customers through a contact centre	2.1	Establish customers' identity in accordance with organisational procedures
	2.2	Check customers' wishes and needs
	2.3	Identify possible matches with products and/or services from information provided by customers

	2.4	Explain to customers the features and benefits of products and/or services for sale
	2.5	Adapt their sales approach and style to meet customer preferences
	2.6	Maximise opportunities for cross-selling and up-selling
	2.7	Complete the authorisation or payment in accordance with organisational procedures
3. Be able to keep direct sales records within a contact centre	3.1	Identify the information about customers, products and/or services that should be recorded during the sales process
	3.2	Record customer, product and/or service information in accordance with organisational procedures
4. Be able to comply with regulations and legislation during direct sales in a contact centre	4.1	Identify the regulatory requirements that have an impact on direct sales activities through a contact centre
	4.2	Ensure compliance with regulations during direct selling through a contact centre
5. Understand how to conduct sales activities in a contact centre	5.1	Describe the features and benefits of the products and/or services offered or supported by the contact centre
	5.2	Describe the organisational policies and procedures for direct sales through a contact centre
	5.3	Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
	5.4	Describe the common objections and questions raised by customers during direct selling
	5.5	Explain how to identify cross-selling and up-selling opportunities

	5.6	Describe different methods of researching potential new customers
	5.7	Explain how to retrieve information from organisational sales records
	5.8	Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling

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

Bespoke Software		
Unit Reference	F/502/4396	
Level	2	
Credit Value	3	
Guided Learning (GL)	20	
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 3.3)**	
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 of different forms or from different sources within the software
	1.3	Respond appropriately to data entry error messages
2. Use appropriate structures to organise and retrieve information efficiently	2.1	Describe what functions to apply to structure and layout information effectively
	2.2	Select and use appropriate structures and/or layouts to organise information
	2.3	Apply local and/or legal guidelines and conventions for the storage and use of data where available
3. Use the functions of the software effectively to process and present information	3.1	Select and use appropriate tools and techniques to edit, process and format information

	3.2 3.3	Check information meets needs, using IT tools and making corrections as necessary Select and use appropriate methods to present information

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

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

- **Recognition of Prior Learning (RPL)** – a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and do not need to develop through a course of learning.
- **Exemption** - Exemption applies to any certificated achievement which is deemed to be of equivalent value to a unit within BIIAB Qualifications Limited qualification but which does not necessarily share the exact learning outcomes and assessment criteria. It is the assessor's responsibility, in conjunction with the Internal Moderator, to map this previous achievement against the assessment requirements of the BIIAB Qualifications Limited qualification to be achieved in order to determine its equivalence.
  - Any queries about the relevance of any certificated evidence should be referred in the first instance to your centre's internal moderator and then to BIIAB Qualifications Limited.
  - It is important to note that there may be restrictions upon a learner's ability to claim exemption or credit transfer which will be dependent upon the currency of the unit/qualification and a learner's existing levels of skill or knowledge.
  - Where past certification only provides evidence that could be considered for exemption of part of a unit, learners must be able to offer additional evidence of previous or recent learning to supplement their evidence of achievement.
- **Credit Transfer** – BIIAB Qualifications Limited may attach credit to a qualification, a unit or a component. Credit transfer is the process of using certificated credits achieved in one qualification and transferring that achievement as a valid contribution to the award of another qualification. Units/Components transferred must share the same learning outcomes and assessment criteria along with the same unit number. Assessors must ensure that they review and verify the evidence through sight of:
  - Original certificates OR
  - Copies of certificates that have been signed and dated by the internal moderator confirming the photocopy is a real copy and make these available for scrutiny by the External Moderator.
- **Equivalencies** – opportunities to count credits from the unit(s) from other qualifications or from unit(s) submitted by other recognised organisations towards the place of mandatory or optional unit(s) specified in the rule of combination. The unit must have the same credit value or greater than the unit(s) in question and be at the same level or higher.

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

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

Certification

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

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

Exemptions

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

Glossary of Terms

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

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

Examples of Guided Learning include:

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

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

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

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

Examples of unsupervised activities that could contribute to TQT include:

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