

YMCA Level 2 Diploma in Customer Service (601/4797/0)

Qualification Specification



YMCA Awards

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Level 2 Diploma in Customer Service

Qualification Specification

Qualification number: 601/4797/0

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Introduction

About YMCA Awards

At YMCA Awards, we are passionate about learner progress. Our qualifications support every learner, whether taking their first steps into fitness or simply wishing to boost their skills. Our high quality resources and assessment materials have been created by leading industry experts in consultation with employers and training providers.

YMCA Awards are an internationally recognised organisation. We are highly respected in health and fitness circles, and most importantly of all we have helped over 200, 000 people launch and advance their careers.

Qualification overview

This qualification is regulated by:

Ofqual
CCEA (Council for Curriculum, Examinations and Assessment)
QW (Qualifications Wales).

Qualification aim

The aim of this qualification is to equip learners with the essential skills, knowledge and understanding to embark on or further a career in a customer service environment.

Overview of knowledge, skills and understanding

Learners will cover:

Knowledge and understanding relating to the qualification:

- Understand organisational structures
- Understand how to communicate verbally with customers
- Understand how to communicate with customers in writing
- Understand how to deal with incoming customer calls
- Understand the promotion of additional products and/or services to customers
- Understand the customer service handover process

Skills relating to the qualification:

- Be able to prepare to deal with customers
- Be able to support improvements to customer service delivery
- Be able to manage personal performance
- Be able to fulfil a personal development plan.

Target group and age range

This qualification is aimed at a range of learners aged 16 and over.

Qualification structure

To achieve the YMCA Level 2 Diploma in Customer Service learners must complete a minimum of 45 credits.

This qualification is made up of 39 units:

Mandatory Group A Units

All 19 credits must be selected from this group.

Unit reference number	Unit title	Level	Credit
A/506/2130	Deliver customer service	2	5
F/506/2131	Understand customers	2	2
J/506/2132	Principles of customer service	2	4
A/506/1964	Understand employer organisations	2	4
L/506/1788	Manage personal performance and development	2	4

Optional Group B Units

A minimum of 3 credits must be selected from this group.

Unit reference number	Unit title	Level	Credit
D/506/2119	Communicate verbally with customers	2	3
T/506/2126	Communicate with customers in writing	2	3

Optional Group C Units

A minimum of 16 credits must be selected from this group.

Unit reference number	Unit title	Level	Credit
H/506/2154	Deal with incoming telephone calls from customers	2	3
K/506/2155	Promote additional products and/or services to customers	2	2
R/506/2134	Process information about customers	2	2
Y/506/2135	Exceed customer expectations	2	3
T/506/2143	Deliver customer service whilst working on customer's premises	2	4
T/506/2157	Carry out customer service handovers	2	3
A/506/2158	Resolve customer service problems	2	5

F/506/2159	Deliver customer service to challenging customers	2	3
Y/506/2149	Develop customer relationships	2	3
T/506/2160	Support customer service improvements	2	3
A/506/2161	Support customers through real-time online customer service	2	3
F/506/2162	Support customers using self-service equipment	2	3
J/506/2163	Use social media to deliver customer service	2	3
L/506/2164	Provide post-transaction customer service	2	5
R/506/2151	Resolve customer's complaints	3	4
D/506/2170	Gather, analyse and interpret customer feedback	3	5

Optional Group D Units

A maximum of 7 credits can be selected from this group.

Unit reference number	Unit title	Level	Credit
T/505/4673	Health and safety procedures in the workplace	2	2
L/506/1807	Manage diary systems	2	2
H/506/1814	Provide reception services	2	3
L/506/1869	Contribute to the organisation of an event	2	3
M/506/1895	Buddy a colleague to develop their skills	2	3
L/506/1905	Employee rights and responsibilities	2	2
R/506/1789	Develop working relationships with colleagues	2	3
J/506/1806	Principles of equality and diversity in the workplace	2	2
M/502/8587	Processing sales orders	2	2
R/502/8601	Meeting customers' after-sales needs	2	3
M/502/8606	Handling objections and closing sales	2	3
K/503/0421	Deal with incidents through a contact centre	2	7
L/503/0394	Carry out direct sales activities in a contact centre	2	5
H/506/1912	Negotiate in a business environment	3	4
F/502/4396	Bespoke software	2	3

The Total Qualification Time (TQT) for this qualification is 450. The Guided Learning Hours (GLH) assigned are 254.

Total Qualification Time (TQT)

This is an estimate of the total amount of time, measured in hours that a learner would reasonably need to be able to show the level of achievement necessary for the award of a qualification.

Total Qualification Time is made up of the following two elements:

- (a) the number of hours which an awarding organisation has assigned to a qualification for Guided Learning (see below), and
- (b) an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Guided Learning Hours (GLH)

This is:

- Face-to-face delivery (learning delivered by a lecturer, supervisor, tutor or other appropriate member of the training team)
- E-learning with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place)
- Invigilated assessment (external tests sat under controlled or open-book conditions)
- Internal assessment carried out by the learner with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place).

This is **not**:

Unsupervised learning such as:

- E-learning that the learner carries out unsupervised and with no real-time support from a lecturer, teacher or tutor
- Assessment internally carried out by the learner without a lecturer, teacher or tutor present/available in real-time (for example, completing a Learner Assessment Record (LAR) at home)
- Any additional further study, revision and training activities that the learner does unsupervised to support their learning.

Recommended Guided Learning Hours – our ongoing review

Your External Quality Assurer (EQA) will ask you to feedback on GLH annually as part of the quality assurance visit. You should base your feedback on a typical learner taking this qualification and the time spent on supervised learning (GLH). If you feel the GLH is different from the above and you wish to feedback before your next EQA visit, please email us: awards.products@ymca.co.uk.

Entry requirements

There are no pre-requisites for the qualification.

Opportunities for progression

Following this qualification, the learner could go on to take a Level 3 Diploma in Customer Service.

This qualification also gives the learner the opportunity to progress to employed roles such as Customer Relationship Manager, Customer Support Officer, Customer Service Team Leader and Customer Service Supervisor.

Mapping to standards

This qualification is based on the National Occupational Standards (NOS) in Customer Service, which were set and designed by CFA, the Sector Skills Council/Standards Setting Body for the sector. For more information please see www.skillsfca.org

Centre approval

This qualification can only be offered by centres approved by YMCA Awards to deliver it. Details of YMCA Awards approval processes can be found on our website: www.ymcaawards.co.uk/centres/become-a-ymca-awards-centre.

Qualification approval

If your centre is already approved, you should only need to complete and submit a qualification approval form to deliver this qualification. However, you may also need to complete an additional staff approval form if the qualification is going to be delivered by staff who are not currently approved by YMCA Awards. Details of additional approvals can be found on our website: www.ymcaawards.co.uk/approvals.

Tutor, assessor and IQA approval requirements

To make sure you meet the most up-to-date requirements please see the YMCA Awards staff approval requirement document. This can be found on our website: www.ymcaawards.co.uk/centres/centre-guidance.

Registration

All learners must be registered within the first 10% of the duration of their course (eg, for a course that lasts 10 days, learners should be registered on the first day of their course at the latest). For further details on registration please go to our website: www.ymcaawards.co.uk/registration.

Qualification availability

This qualification is available in:
England and regulated by Ofqual
Northern Ireland and regulated by CCEA (Council for Curriculum, Examinations and Assessment).

Reasonable adjustments and special considerations

In making this qualification available, YMCA Awards has made every attempt to make sure that there are no unnecessary barriers to achievement. You can find full details of our reasonable adjustment and special considerations policy on our website: www.ymcaawards.co.uk/centres/policies-and-procedures.

Enquires and appeals procedures

YMCA Awards has an appeals procedure in accordance with the regulatory arrangements in the General Conditions of Recognition. Full details of these procedures are available on our website:

www.ymcaawards.co.uk/centres/policies-and-procedures.

Assessment and quality assurance

How the qualification is assessed

Assessment is the process of measuring a learner's skills, knowledge and understanding against the standards set in the qualification.

This qualification is a unit-based qualification and each unit contains learning outcomes and assessment criteria. Learning outcomes set out what the learner is expected to know, understand or be able to do as a result of the learning process. Assessment criteria detail the standards a learner is expected to meet and are broken down into what the learner 'can' do as a result of successfully achieving the unit.

The learner can be assessed holistically or individually as long as they show that the learning outcomes have been achieved.

Competency based learning outcomes (eg, be able to) are typically assessed through direct observation and these will take place in a real work environment. Where a real work environment is not stipulated the observation can be simulated and be internally assessed.

Knowledge based learning outcomes (eg, know or understand) can be assessed in a number of different ways such as worksheets, projects, professional discussion etc. The assessment method chosen should reflect the content of the unit.

This qualification must be assessed in line with YMCA Awards assessment policies and procedures

www.ymcaawards.co.uk/centres/centre-guidance.

The YMCA Level 2 Diploma in Customer Service is assessed through internal assessment.

Internal assessment

YMCA Awards suggest the following approaches to internal assessment:

Using a Learner Assessment Record (LAR)

This document typically contains assessment guidance and paperwork developed by YMCA Awards to support the assessment of a qualification.

To check if a Learner Assessment Record is available for this qualification, please make sure you are logged in to the centre home on the website and follow this link: www.ymcaawards.co.uk/download-resources/lars.

Creating a portfolio of evidence

If a YMCA Awards Learner Assessment Record (LAR) is not used to evidence internal assessment then the learner must create a portfolio of evidence. Centres must work with learners to create this portfolio and need to make sure that the learner's portfolio shows coverage of the learning outcomes and/or assessment criteria where required.

A typical portfolio of evidence could include:

- Evidence index
- Assessor observation – completed observational checklists and related action plans
- Witness testimony
- Candidate’s proof of work
- Worksheets
- Assignments/projects/reports/presentations
- Record of professional discussion
- Record of oral and written questioning
- Candidate and peer reports
- Recognition of Prior Learning (RPL).
- Summary of achievement.

Centres need to make sure assessment specifications and paperwork are signed off by the EQA before delivery.

As a guide to selecting appropriate assessments methods see the suggested example in the ‘Qualification content’ section of this specification.

External assessment

There is no external assessment for this qualification.

Assessors

The role of the assessor is to make an informed judgement about the evidence a learner should provide to show they can meet the assessment criteria. For further guidance please see the ‘Role of the assessor’ document on the website: www.ymcaawards.co.uk/centres/centre-guidance.

Internal and external quality assurance

The role of the Internal Quality Assurer (IQA) is to make an informed judgement(s) regarding the practice of and decisions made by the assessment team to maintain standards. They are a vital link between the assessors and the External Quality Assurer (EQA). For further information on the role of the IQA and the EQA go to the website: www.ymcaawards.co.uk/centres/centre-guidance.

Qualification content

Unit specifications and recommended assessment methods

Deliver customer service (A/506/2130)

Unit aim

This unit aims to develop the knowledge and skills needed to deliver customer service. On completion of this unit, learners will be able to prepare to deal with customers, provide customer service, and support improvements to customer service delivery.

Unit content

The learner will:

1. Understand customer service delivery

The learner can:

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

The learner will:

2. Understand the relationship between customer service and a brand

The learner can:

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

The learner will:

3. Be able to prepare to deal with customers

The learner can:

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

The learner will:

4. Be able to provide customer service

The learner can:

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

The learner will:

5. Be able to support improvements to customer service delivery

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning

Understand customers (F/506/2131)

Unit aim

This unit aims to develop the knowledge needed to understand customers. On completion of this unit, learners will have developed an understanding of different types of customers and will also know the value of customers and their loyalty.

Unit content

The learner will:

1. Understand different types of customers

The learner can:

- 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

The learner will:

2. Understand the value of customers and their loyalty

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning

Principles of Customer Service

(J/506/2132)

Unit aim

This unit aims to develop knowledge and understanding regarding the key principles of customer service. On completion of this unit, learners will have developed an understanding of customer service and how to deliver it effectively. Learners will also develop an awareness of how legal and ethical requirements relate to customer service and will understand the management of customer service information.

Unit content

The learner will:

1. Understand customer service

The learner can:

- 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

The learner will:

2. Understand how legal and ethical requirements relate to customer service

The learner can:

- 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

The learner will:

3. Understand how to deliver effective customer service

The learner can:

- 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

The learner will:

4. Understand the management of customer service information

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning

Understand employer organisations (A/506/1964)

Unit aim

This unit aims to develop knowledge and understanding regarding employer organisations. On completion of this unit, learners will have developed an understanding of organisational structures and the organisational environment.

Unit content

The learner will:

1. Understand organisational structures

The learner can:

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

The learner will:

2. Understand the organisational environment

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning

Manage personal performance and development (L506/1788)

Unit aim

This unit aims to develop the knowledge and skills needed to manage personal performance and development. On completion of this unit, learners will be able to manage their own performance, time and workload. They will also be able to identify their own development needs and fulfil a personal development plan.

Unit content

The learner will:

1. Be able to manage personal performance

The learner can:

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

The learner will:

2. Be able to manage their own time and workload

The learner can:

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”

The learner will:

3. Be able to identify their own development needs

The learner can:

- 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

The learner will:

4. Be able to fulfil a personal development plan

The learner can:

- 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

Assessment specification

May be assessed by:
 Observation
 Products of work
 Reflective account
 Tasks and projects
 Witness testimony

Communicate verbally with customers (D/506/2119)

Unit aim

This unit aims to develop the knowledge and skills needed to communicate verbally with customers. On completion of this unit, learners will be able to use customer service language to communicate with customers.

Unit content

The learner will:

1. Understand how to communicate verbally with customers

The learner can:

- 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

The learner will:

2. Be able to use customer service language to communicate with customers

The learner can:

- 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

Assessment specification	May be assessed by:
	Observation Products of work Reflective account Tasks and projects Witness testimony

Communicate with customers in writing (T/506/2126)

Unit aim

This unit aims to develop the knowledge and skills needed to communicate with customers in writing. On completion of this unit, learners will be able to both plan and produce written communications.

Unit content

The learner will:

1. Understand how to communicate with customers in writing

The learner can:

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

The learner will:

2. Be able to plan written communications to customers

The learner can:

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

The learner will:

3. Be able to communicate with customers in writing

The learner can:

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, and legal and ethical requirements when communicating with customers in writing

Assessment specification	May be assessed by:
	Products of work Reflective account Tasks and projects Observation

Deal with incoming telephone calls from customers (H/506/2154)

Unit aim

This unit aims to develop the knowledge and skills needed to deal with incoming telephone calls from customers. On completion of this unit, learners will be able to establish the purpose of incoming customer calls and deal with customer questions and requests.

Unit content

The learner will:

1. Understand how to deal with incoming customer calls

The learner can:

- 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

The learner will:

2. Be able to establish the purpose of incoming customer calls

The learner can:

- 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

The learner will:

3. Be able to deal with customer questions and requests

The learner can:

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

Assessment specification

May be assessed by:

Products of work

Reflective account

Tasks and projects

Observation

Witness Testimony

Make telephone calls to customers (K506/2155)

Unit aim

This unit aims to develop the knowledge and skills needed to make telephone calls to customers. On completion of this unit, learners will be able to plan and make telephone calls to customers.

Unit content

The learner will:

1. Understand how to make telephone calls to customers

The learner can:

- 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

The learner will:

2. Be able to plan telephone calls to customers

The learner can:

- 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

The learner will:

3. Be able to make telephone calls to customers

The learner can:

- 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

Assessment specification	May be assessed by:
	Products of work Reflective account Tasks and projects Observation Witness Testimony

Promote additional products and/or services to customers (L/506/2133)

Unit aim

This unit aims to develop the knowledge and skills needed to promote additional products and/or services to customers. On completion of this unit, learners will be able to promote additional products and/or services to customers.

Unit content

The learner will:

1. Understand the promotion of additional products and/or services to customers

The learner can:

1.1 Describe organisational policies and procedures on the promotion of additional products and/or services

1.2 Explain the importance of keeping product and/or 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

The learner will:

2. Be able to promote additional products and/or services to customers

The learner can:

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

Assessment specification

May be assessed by:

Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Process information about customers (R/506/2134)

Unit aim

This unit aims to develop the knowledge and skills needed to process customer information. On completion of this unit, learners will be able to process customer information.

Unit content

The learner will:

1. Understand how to process customer information

The learner can:

- 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

The learner will:

2. Be able to process customer information

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Exceed customer expectations (Y/506/2135)

Unit aim

This unit aims to develop the knowledge and skills needed to exceed customer expectations. On completion of this unit, learners will be able to exceed customer expectations at work.

Unit content

The learner will:

1. Understand how to exceed customer expectations

The learner can:

- 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

The learner will:

2. Be able to exceed customer expectations

The learner can:

- 2.1 Identify differences between customers' expectations and needs and the service offer
- 2.2 Explain the service offer clearly and concisely to customers
- 2.3 Identify options that offer added value without affecting other customers adversely
- 2.4 Make offers to customers within their own authority levels
- 2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
- 2.6 Record agreements made and actions taken

Assessment specification

May be assessed by:

Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Deliver customer service whilst working on customer's premises (T/506/2143)

Unit aim

This unit aims to develop the knowledge and skills needed to deliver customer service whilst working on customers' premises. On completion of this unit, learners will be able to deliver customer service whilst working on customers' premises.

Unit content

The learner will:

1. Understand how to deliver customer service whilst working on customers' premises

The learner can:

- 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

The learner will:

2. Be able to deliver customer service whilst working on customers' premises

The learner can:

- 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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Carry out customer service handovers (T/506/2157)

Unit aim

This unit aims to develop the knowledge and skills needed to carry out customer service handovers. On completion of this unit, learners will be able to plan and carry out customer service handovers.

Unit content

The learner will:

1. Understand the customer service handover process

The learner can:

- 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

The learner will:

2. Be able to plan customer service handovers

The learner can:

- 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

The learner will:

3. Be able to carry out customer service handovers

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Resolve customer service problems (A/506/2158)

Unit aim

This unit aims to develop the knowledge and skills needed to resolve customer service problems. On completion of this unit, learners will be able to resolve customer service problems and manage unresolved customer service problems.

Unit content

The learner will:

1. Understand the resolution of customer service problems

The learner can:

- 1.1 Describe an 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

The learner will:

2. Be able to resolve customer service problems

The learner can:

- 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

The learner will:

3. Be able to manage unresolved customer service problems

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Deliver customer service to challenging customers (F/506/2159)

Unit aim

This unit aims to develop the knowledge and skills needed to deliver customer service to challenging customers. On completion of this unit, learners will be able to deal with challenging customers.

Unit content

The learner will:

1. Understand the delivery of customer service to challenging customers

The learner can:

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

The learner will:

2. Be able to deal with challenging customers

The learner can:

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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Develop customer relationships (Y/506/2149)

Unit aim

This unit aims to develop the knowledge and skills needed to develop customer relationships. On completion of this unit, learners will be able to develop relationships with customers.

Unit content

The learner will:

1. Understand how to develop customer relationships

The learner can:

- 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 relationship

The learner will:

2. Be able to develop relationships with customers

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Support customer service improvements (T/506/2160)

Unit aim

This unit aims to develop the knowledge and skills needed to support customer service improvements. On completion of this unit, learners will be able to identify the potential for improvements to customer service and support the implementation of improvements to customer service.

Unit content

The learner will:

1. Understand how to support customer service improvements

The learner can:

- 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

The learner will:

2. Be able to identify the potential for improvements to customer service

The learner can:

- 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

The learner will:

3. Be able to support the implementation of improvements to customer service

The learner can:

- 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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Support customers through real-time online customer service (A/506/2161)

Unit aim

This unit aims to develop the knowledge and skills needed to support customers through real-time online customer service. On completion of this unit, learners will be able to establish the customer service support needed by customers and support online customer service in real-time.

Unit content

The learner will:

1. Understand how to support customers through real-time online customer service

The learner can:

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 online customer services

1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems

The learner will:

2. Be able to establish the customer service support needed by customers

The learner can:

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

The learner will:

3. Be able to support online customer service in real-time

The learner can:

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 online customer service

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Support customers using self-service equipment (F/506/2162)

Unit aim

This unit aims to develop the knowledge and skills needed to support customers using self-service equipment. On completion of this unit, learners will be able to identify the help needed by customers using self-service equipment and consequently provide help to customers using self-service equipment.

Unit content

The learner will:

1. Understand how to support customers using self-service equipment

The learner can:

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

The learner will:

2. Be able to identify the help needed by customers using self-service equipment

The learner can:

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

The learner will:

3. Be able to help customers to use self-service equipment

The learner can:

3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment

3.2 Use staff override functions to enable self-service equipment to be used by customers

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

3.4 Report equipment-related errors and issues to the right person

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Use social media to deliver customer service (J/506/2163)

Unit aim

This unit aims to develop the knowledge and skills needed when using social media to deliver customer service. On completion of this unit, learners will be able to deal with customers using social media.

Unit content

The learner will:

1. Understand social media in a business environment

The learner can:

- 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

The learner will:

2. Be able to deal with customers using social media

The learner can:

- 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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Provide post-transaction customer service (L/506/2164)

Unit aim

This unit aims to develop the knowledge and skills needed to provide post-transaction customer service. On completion of this unit, learners will be able to provide post-transaction customer service.

Unit content

The learner will:

1. Understand post-transaction customer service

The learner can:

- 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

The learner will:

2. Be able to provide post-transaction customer service

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Resolve customers' complaints (R/506/2151)

Unit aim

This unit aims to develop the knowledge and skills needed to resolve customers' complaints. On completion of this unit, learners will be able to deal with customers' complaints.

Unit content

The learner will:

1. Understand the monitoring and resolution of customers' complaints

The learner can:

- 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

The learner will:

2. Be able to deal with customers' complaints

The learner can:

- 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' comp

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Gather, analyse and interpret customer feedback (D/506/2170)

Unit aim

This unit aims to develop the knowledge and skills needed to gather, analyse and interpret customer feedback. On completion of this unit, learners will be able to plan the collection of customer feedback, gather customer feedback, and analyse and interpret customer feedback to inform recommendations for improvements.

Unit content

The learner will:

1. Understand how to gather, analyse and interpret customer feedback

The learner can:

- 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

The learner will:

2. Be able to plan the collection of customer feedback on customer service issues

The learner can:

- 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

The learner will:

3. Be able to gather customer feedback

The learner can:

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

The learner will:

4. Be able to analyse and interpret customer feedback to recommend improvements

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Health and safety procedures in the workplace (T/505/4673)

Unit aim

This unit aims to develop the knowledge and skills needed to follow health and safety procedures in the workplace. On completion of this unit, learners will be able to carry out health and safety tasks in the workplace.

Unit content

The learner will:

1. Know health and safety procedures in the workplace

The learner can:

1.1 Define the main responsibilities for health and safety in the workplace of the following:

a) employers

b) 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.

The learner will:

2. Be able to carry out tasks with regard to health and safety in the workplace

The learner can:

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.

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation

Manage diary systems

Unit aim

This unit aims to develop the knowledge and skills needed to manage diary systems. On completion of this unit, learners will be able to manage diary systems.

Unit content

The learner will:

1. Understand the management of diary systems

The learner can:

- 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

The learner will:

2. Be able to manage diary systems

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Provide reception services (H/506/1814)

Unit aim

This unit aims to develop the knowledge and skills needed to provide reception services. On completion of this unit, learners will be able to provide reception services.

Unit content

The learner will:

1. Understand reception services

The learner can:

- 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

The learner will:

2. Be able to provide a reception service

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation

Contribute to the organisation of an event (L/506/1869)

Unit aim

This unit aims to develop the knowledge and skills needed to contribute to the organisation of an event. On completion of this unit, learners will be able to carry out pre-event actions, set up an event and then carry out post-event actions.

Unit content

The learner will:

1. Understand event organisation

The learner can:

- 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

The learner will:

2. Be able to carry out pre-event actions

The learner can:

- 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

The learner will:

3. Be able to set up an event

The learner can:

- 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

The learner will:

4. Be able to carry out post-event actions

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Buddy a colleague to develop their skills (M/506/1895)

Unit aim

This unit aims to develop the knowledge and skills needed to buddy a colleague to develop their skills. On completion of this unit, learners will be able to develop a plan to buddy a colleague and then put that plan into action by supporting a buddy colleague in carrying out work activities.

Unit content

The learner will:

1. Understand how to buddy a colleague

The learner can:

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

The learner will:

2. Be able to plan to buddy a colleague

The learner can:

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

The learner will:

3. Be able to support a buddy colleague carrying out work activities

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Employee rights and responsibilities (L/506/1905)

Unit aim

This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. On completion of this unit, learners will have developed an understanding of the role of organisations and industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.

Unit content

The learner will:

1. Understand the role of organisations and industries

The learner can:

- 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

The learner will:

2. Understand employers' expectations and employees' rights and obligations

The learner can:

- 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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning (oral or written)

Develop working relationships with colleagues (R/506/1789)

Unit aim

This unit aims to develop the knowledge and skills needed to develop working relationships with colleagues, and introduces learners to the key principles underpinning effective team working. On completion of this unit, learners will be able to maintain effective working relationships with colleagues and work collaboratively to resolve problems.

Unit content

The learner will:

1. Understand the principles of effective team working

The learner can:

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

The learner will:

2. Be able to maintain effective working relationships with colleagues

The learner can:

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

The learner will:

3. Be able to collaborate with colleagues to resolve problems

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Principles of equality and diversity in the workplace (J/506/1806)

Unit aim

This unit aims to develop knowledge and understanding regarding equality and diversity, and will introduce learners to the key principles underpinning equality and diversity in the workplace. On completion of this unit, learners will understand the implications of equality legislation and will understand organisational standards and expectations for equality and diversity in the workplace.

Unit content

The learner will:

1. Understand the implications of equality legislation

The learner can:

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

The learner will:

2. Understand organisational standards and expectations for equality and diversity and context in the workplace

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Questioning (oral or written)

Processing sales orders (M/502/8587)

Unit aim

The aim of this unit is to provide the skills and knowledge needed to process and follow up orders and payments. On completion of this unit, learners will be able to process and follow up sales orders.

Unit content

The learner will:

1. Understand how to process and follow up sales orders

The learner can:

- 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

The learner will:

2. Be able to process sales orders

The learner can:

- 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

The learner will:

3. Be able to follow up sales order processing

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Meeting customers' after-sales needs (R/502/8601)

Unit aim

This unit aims to develop the knowledge and skills needed to provide an after-sales service that meets customers' needs. On completion of this unit, learners will be able to investigate, handle and review customers' after-sales needs.

Unit content

The learner will:

1. Be able to investigate customer after-sales needs

The learner can:

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

The learner will:

2. Be able to handle customers' after-sales needs

The learner can:

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

The learner will:

3. Be able to review the after-sales process

The learner can:

3.1 Obtain customers' comments on service reliability from customers

3.2 Analyse and report the findings to the relevant person in the organisation

3.3 Make recommendations for improvements to after-sales service provision in the light of customer feedback

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Handling objections and closing sales (M/502/8606)

Unit aim

This unit aims to develop the knowledge and skills needed to handle sales objections and close sales. On completion of this unit, learners will be able to handle sales objections and close sales.

Unit content

The learner will:

1. Understand how to handle sales objections

The learner can:

- 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

The learner will:

2. Understand how to close the sale

The learner can:

- 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

The learner will:

3. Be able to handle objections

The learner can:

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

The learner will:

4. Be able to close the sale

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Deal with incidents through a contact centre (K/503/0421)

Unit aim

This unit aims to develop the knowledge and skills needed to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and know how to deal with incidents in a contact centre. On completion of this unit, learners will be able to deal effectively with incidents through a contact centre.

Unit content

The learner will:

1. Be able to deal with incidents through a contact centre

The learner can:

- 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

The learner will:

2. Be able to use contact centre communications systems to deploy incident management resources

The learner can:

- 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

The learner will:

3. Understand how to deal with incidents in a contact centre

The learner can:

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

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony

Carry out direct sales activities in a contact centre (L/503/0394)

Unit aim

This unit aims to develop the knowledge and skills needed 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 know how to conduct sales activities in a contact centre. On completion of this unit, learners will be able to carry out direct sales activities effectively in a contact centre.

Unit content

The learner will:

1. Be able to gather information needed for direct sales activities in a contact centre

The learner can:

- 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

The learner will:

2. Be able to carry out direct sales to customers through a contact centre

The learner can:

- 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

The learner will:

3. Be able to keep direct sales records within a contact centre

The learner can:

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

The learner will:

4. Be able to comply with regulations and legislation during direct sales in a contact centre

The learner can:

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

The learner will:

5. Understand how to conduct sales activities in a contact centre

The learner can:

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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Negotiate in a business environment (H/506/1912)

Unit aim

This unit aims to develop the knowledge and skills needed to negotiate in a business environment and introduces learners to the principles underpinning negotiation. On completion of this unit, learners will be able to prepare for business negotiations and carry out business negotiations.

Unit content

The learner will:

1. Understand the principles underpinning negotiation

The learner can:

- 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

The learner will:

2. Be able to prepare for business negotiations

The learner can:

- 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

The learner will:

3. Be able to carry out business negotiations

The learner can:

- 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

Assessment specification	May be assessed by: Products of work Reflective account Tasks and projects Observation Witness Testimony
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Bespoke software (F/502/4396)

Unit aim

This unit aims to develop the knowledge and skills needed to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively. On completion of this unit, learners will be able to utilise bespoke software applications effectively to input, combine, retrieve, process and present information.

Unit content

The learner will:

1. Input and combine information using bespoke applications

The learner can:

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

The learner will:

2. Use appropriate structures to organise and retrieve information efficiently

The learner can:

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

The learner will:

3. Use the functions of the software effectively to process and present information

The learner can:

3.1 Select and use appropriate tools and techniques to edit, process and format information

3.2 Check information meets needs, using IT tools and making corrections as necessary

3.3 Select and use appropriate methods to present information

Assessment specification

May be assessed by:
Products of work
Reflective account
Tasks and projects
Observation
Witness Testimony



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