



## **Level 1 Award for Introduction to Customer Service**

### **Qualification Specification**

# Contents

	<b>Page</b>
Introduction	3
Qualification profile	3
Qualification structure	4
Centre requirements	5
Support for candidates	5
Assessment	5
Internal quality assurance	6
Adjustments to assessment	6
Results enquiries and appeals	7
Certification	7
Learning outcomes and assessment criteria	8

## Introduction

The **ProQual Level 1 Award for Introduction to Customer Service** qualification provides an opportunity to gain the basic skills and knowledge required for any job which involves dealing with customers. It provides an introduction to the principles of customer service and is appropriate for individuals working in a customer service role or those who are developing employability skills and preparing for work.

The awarding body for this qualification is ProQual Awarding Body and the regulatory body is the Office of Qualifications and Examinations Regulation (Ofqual). The specification for these qualifications has been approved by the Department for Education and Skills (DfES) for use by centres in Wales and by the Council for the Curriculum Examinations and Assessment (CCEA) for use by centres in Northern Ireland.

The qualification has been accredited onto the Regulated Qualifications Framework (RQF); it provides a progression route to higher level qualifications in Customer Service or other discipline related qualifications.

## Qualification Profile

Qualification title	<b>ProQual Level 1 Award for Introduction to Customer Service</b>
Ofqual qualification number	600/5863/8
Level	Level 1
Total qualification time	70 hours
Guided learning hours	57
Assessment	Pass or fail Internally assessed and verified by centre staff External quality assurance by ProQual verifiers
Qualification start date	1/7/12
Qualification end date	

## Entry Requirements

There are no formal entry requirements for this qualification.

Centres should carry out an **initial assessment** of candidate skills and knowledge to identify any gaps and help plan the assessment.

## Qualification Structure

Candidates must achieve a minimum of **7 credits**: **3 credits** from the **Mandatory unit** and a minimum of **4 credits** from the **Optional units**. A minimum of 5 credits must be at level 1.

Mandatory Unit			
Unit Reference Number	Unit Title	Unit Level	Credit Value
R/601/6071	Apply legislation, regulation and organisational procedures for customer service	1	3
Optional Units			
Unit Reference Number	Unit Title	Unit Level	Credit Value
A/601/6047	The importance of appearance and behaviour in customer service	Entry 3	2
R/601/6068	Create a good impression to customers	1	2
J/601/6052	Legislation, regulation and procedures to follow in customer service	Entry 3	2
R/601/6054	Understand how to deal with queries and requests	Entry 3	3
H/601/6074	Deal with queries and requests	1	3
D/601/6056	Communicate customers' problems with others	Entry 3	2
K/601/6075	Record and communicate customer problems	1	2
K/601/6058	The customer service job role	Entry 3	2
M/601/6059	Handling telephone calls from customers	Entry 3	2
T/601/6077	Answer telephone calls from customers	1	2
M/601/6062	Communicate effectively with customers	Entry 3	2
A/601/6078	Positive communication with customers	1	2
A/601/6064	Effective relationships with customers and colleagues	Entry 3	2
F/601/6079	Contribute to effective customer service	1	2
F/601/6065	Introduction to customer service	Entry 3	2
T/601/6080	The customer service experience	1	2
L/601/6067	Working in a customer focused way	Entry 3	2
A/601/6081	Work in a customer-friendly way	1	2

## Centre Requirements

Centres must be approved to offer this qualification. If your centre is not approved please complete and submit form **ProQual Additional Qualification Approval Application**.

### Staff

Staff delivering this qualification must be appropriately qualified and/or occupationally competent.

### Assessors/Internal Quality Assurance

For each competence-based unit centres must be able to provide at least one assessor and one internal verifier who are suitably qualified for the specific occupational area. Assessors and internal verifiers for competence-based units or qualifications will normally need to hold appropriate assessor or verifier qualifications, such as:

- Award in Assessing Competence in the Work Environment
- Award in Assessing Vocationally Related Achievement
- Certificate in Assessing Vocational Achievement
- Award in the Internal Quality Assurance of Assessment Processes and Practices
- Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practices

## Support for Candidates

Materials produced by centres to support candidates should:

- enable them to track their achievements as they progress through the learning outcomes and assessment criteria;
- provide information on where ProQual's policies and procedures can be viewed;
- provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence

## Assessment

This qualification is competence-based, candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

The qualification must be assessed by an appropriately experienced and qualified assessor.

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

- Evidence can include:
- observation report by assessor
  - assignments/projects/reports
  - professional discussion
  - witness testimony
  - candidate product
  - worksheets
  - record of oral and written questioning
  - Recognition of Prior Learning

**Learning outcomes** set out what a candidate is expected to know, understand or be able to do.

**Assessment criteria** specify the standard a candidate must meet to show the learning outcome has been achieved.

*Learning outcomes and assessment criteria for this qualification can be found from page 8.*

## Internal Quality Assurance

An internal quality assurance verifier confirms that assessment decisions made in centres are made by competent and qualified assessors, that they are the result of sound and fair assessment practice and that they are recorded accurately and appropriately.

## Adjustments to Assessment

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

## Results Enquiries and Appeals

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

## Certification

Candidates who achieve the required credits for qualifications will be awarded:

- A certificate listing all units achieved with their related credit value, and
- A certificate giving the full qualification title -

### **ProQual Level 1 Award for Introduction to Customer Service**

#### **Claiming certificates**

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the required number of credits for a qualification. All certificates will be issued to the centre for successful candidates.

#### **Unit certificates**

If a candidate does not achieve all of the units/credits required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units/credits achieved.

#### **Replacement certificates**

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement certificates.

## Learning Outcomes and Assessment criteria

### Unit R/601/6071

#### Apply legislation, regulation and organisational procedures for customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to follow customer service procedures for a particular job	1.1 Describe the limits of own responsibility and authority for a particular job in customer service
	1.2 Carry out steps in customer service procedures for a particular job
2 Be able to protect the security of property and information when delivering customer service	2.1 Observe organisational procedures for the security of property when delivering customer service
	2.2 Observe organisational procedures for the security of information when delivering customer service
3 Know the health and safety requirements of delivering customer service	3.1 Describe the health and safety rules that relate to delivering customer service
	3.2 Describe the main health and safety risks for customers and colleagues when delivering customer service
4 Know other external rules that impact on customer service delivery	4.1 Describe the key legislation and external regulations relating to customer service delivery
	4.2 Describe actions to avoid because of legislation and regulation when delivering customer service
	4.3 Describe the importance of treating customers equally when delivering customer service

## Unit A/601/6047

### The importance of appearance and behaviour in customer service

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the dress requirements in customer service jobs	1.1	State the appropriate dress in a particular customer service job
		1.2	State inappropriate dress in a particular customer service job
2	Know how general appearance affects the way customers react	2.1	Identify customer expectations of appearance in a particular customer service job role
		2.2	Identify personal appearance that could cause negative customer reaction
3	Know how to interact with customers	3.1	State the importance of making a good first impression on customers
		3.2	Describe how to greet customers politely and positively
		3.3	State how to recognise when a customer wants or needs attention
		3.4	State how to respond when a customer wants or needs attention
		3.5	Describe how to focus on customers and avoid distractions when dealing with them
		3.6	State the importance of thanking customers for their business or for information given

## Unit R/601/6068

### Create a good impression to customers

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to dress appropriately for a customer service job	1.1	Describe appropriate dress requirements in different customer service jobs
		1.2	Identify inappropriate dress in different customer service jobs
		1.3	Dress in a way that meets customer expectations in a particular job
2	Be able to demonstrate an appropriate appearance for a customer service job	2.1	State the importance of making a good first impression on customers
		2.2	Identify personal appearance that may cause a negative reaction from customers
		2.3	Present self in a way that makes a positive impression on customers
3	Be able to relate effectively to customers	3.1	Describe methods of communicating with customers
		3.2	Describe why offensive language should be avoided when dealing with customers
		3.3	Use appropriate methods of communication when dealing with customers

## Unit J/601/6052

### Legislation, regulation and procedures to follow in customer service

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know organisational procedures for customer service	1.1	State the procedures for a particular customer service job
		1.2	State the limits of responsibility and authority for a particular job in customer service
2	Know how to protect the security of property and information when delivering customer service	2.1	State organisational procedures for the security of property when delivering customer service
		2.2	State organisational procedures for the security of information about customers when delivering customer service
3	Know the health and safety rules that relate to a customer service job	3.1	State the health and safety rules that relate to a customer service job
		3.2	State the health and safety risks to customers and colleagues
4	Know the relevant external rules in a customer service job	4.1	List legislation and external regulations that impact on a customer service job
		4.2	List things that should not be done in a customer service job because of regulation
		4.3	State your responsibilities for treating customers equally

## Unit R/601/6054

### Understand how to deal with queries and requests

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know the services or products of a section or department within an organisation	1.1 List the services or products a selected section or department offers  1.2 Describe the key features of the services or products a selected section or department offers
2 Know the types of question that customers will ask	2.1 List the most frequently asked questions about a selected section or department's services or products  2.2 State the preferred answers to the most frequently asked questions about a selected section or department's services or products
3 Know how to recognise when a customer has a query or request	3.1 Listen closely to questions from customers  3.2 Identify when questions from customers require a specific response or action
4 Know how to clarify details of queries or requests from customers	4.1 State how to check with customers that they have heard their questions correctly  4.2 State the importance of keeping customers informed about actions on their queries or requests

## Unit H/601/6074

### Deal with queries and requests

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the services and products of a section or department	1.1	Describe the services and products of a selected section or department
		1.2	List the key features and benefits to customers of the services and products of a selected section or department
2	Know the customer's interests about the services and products of a section or department	2.1	Describe the features and benefits of services and products that most interest customers
		2.2	Identify questions that customers frequently ask about services and products and the preferred answers to those questions
3	Be able to clarify customer queries or requests	3.1	Listen closely to questions and responses from customers
		3.2	Clarify queries and requests from customers
4	Be able to deal with queries or requests from customers	4.1	Deal with a query or request in a positive way
		4.2	Seek information or support if the query or request is outside of their own knowledge or authority

## Unit D/601/6056

### Communicate customers' problems with others

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know how to collect information about a problem from a customer	1.1	List the information to seek when asking a customer for details about a problem
		1.2	Describe how to check understanding of a problem with a customer
2	Be able to log information about a customer problem	2.1	Take notes about a customer problem
		2.2	Check with a customer that notes about the problem are correct
3	Know how to select information about a customer problem to pass to a colleague	3.1	State the importance of selecting the correct information to identify the customer and the problem
		3.2	Identify the details of a customer problem that should be passed to a colleague
4	Know how to communicate with a customer and a colleague about the problem	4.1	State the importance of passing full information about the customer problem to a colleague accurately and promptly
		4.2	State the importance of keeping a customer informed about what is being done about the problem

## Unit K/601/6075

### Record and communicate customer problems

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to collect detailed information from a customer with a problem	1.1 Question a customer to collect detailed information about a problem  1.2 Check why the customer believes that their expectations are not being met
2 Be able to record detailed information about a customer problem	2.1 Keep a record of details about a customer service problem  2.2 Confirm the accuracy of the record of a customer problem with the customer
3 Be able to communicate a customer problem to a colleague and a customer	3.1 Select information about the customer and the problem, that is sufficient for a colleague to understand it  3.2 Inform a colleague about the customer problem  3.3 Give the customer information about the steps being taken to deal with the problem

## Unit K/601/6058

### The customer service job role

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know what the delivery of good customer service involves	1.1	List the information a person needs to do a customer service job
		1.2	List the parts of a job which impact directly on customer service
		1.3	Describe the key individual skills needed to do a customer service job
		1.4	Describe how the way somebody behaves in a job affects the customer experience
2	Know the requirements of an entry level customer service job	2.1	Describe a job that may be a first step in delivering customer service
		2.2	Identify who the customers are
		2.3	Describe what customers expect from somebody doing that job
3	Know the outline of a job involving customer service that may be accessible after gaining experience at entry level	3.1	Describe a job that may follow from gaining experience in a first step customer service job
		3.2	Identify who the customers are
		3.3	Describe what customers expect from somebody doing that job

## Unit M/601/6059

### Handling telephone calls from customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know how to greet customers calling on the telephone	1.1 State the importance of answering the telephone promptly  1.2 Identify appropriate and friendly greetings to use when answering customer telephone calls
2 Know how to deal with customers calling on the telephone	2.1 State the importance of identifying the customer's needs  2.2 State how to confirm customer needs  2.3 Describe how to pass on calls from customers to appropriate colleagues when customer needs are outside their own authority  2.4 State the importance of closing the call, thanking customers for their business or for information given
3 Know how to deal with communication problems whilst on the telephone	3.1 State the types of communication problems that may occur  3.2 Describe how to focus on the call and avoid distractions

## Unit T/601/6077

### Answer telephone calls from customers

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to greet customers calling on the telephone	1.1	Explain why an appropriate greeting is needed for customers
		1.2	Use the appropriate greeting when answering customer calls
2	Be able to deal with incoming customer telephone calls	2.1	Use questions to clarify customer wishes and needs during telephone calls
		2.2	Deal with the customer's requests within the limits of own authority
		2.3	Pass on calls from customers to appropriate colleagues when customer needs are outside their own authority
3	Be able to respond to requests from customers	3.1	Exchange information with customers over the telephone
		3.2	Summarise information from customers to check they have heard requests correctly

## Unit M/601/6062

### Communicate effectively with customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know the importance of speaking clearly to customers	1.1 State why it is important to speak clearly to customers  1.2 State how to speak clearly to customers about services or products  1.3 List the information to include when answering questions from customers about services or products
2 Know the importance of listening actively to customers	2.1 State how to give customers their full attention when listening to them  2.2 State why it is important to listen to customers
3 Know the importance of using information from customers to contribute to good customer service	3.1 Describe how to confirm with customers that details are correct  3.2 State the importance of reacting quickly to what they have heard from customers  3.3 List information they might hear from customers that should be passed to colleagues

## Unit A/601/6078

### Positive communication with customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to hold conversations with customers	1.1 Use questions to develop a customer conversation 1.2 Describe how to listen actively to customers 1.3 Listen actively to customers 1.4 Close a conversation with a customer
2 Be able to respond to requests from customers	2.1 Exchange information with customers in a conversation 2.2 Summarise information from customers to check they have heard requests correctly 2.3 Pass information from customers to colleagues
3 Be able to use body language when dealing with customers	3.1 Identify types of body language that affect customers positively 3.2 Identify types of body language that affect customers negatively 3.3 Use positive body language when dealing with customers

## Unit A/601/6064

### Effective relationships with customers and colleagues

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know how to relate effectively to customers	1.1 identify methods of communication when dealing with customers  1.2 Identify language to avoid because customers may consider it to be offensive  1.3 Identify language to avoid because customers may consider it too familiar
2 Know how to relate effectively to colleagues in a customer service team	2.1 State why friendliness and helpfulness are useful in customer service teamwork  2.2 State how to help colleagues when doing routine customer service tasks  2.3 State what help could be reasonably expected from colleagues when carrying out routine customer service tasks  2.4 State what help colleagues could reasonably expect to be given when carrying out routine customer service tasks
3 Know the importance of positive body language when dealing with customers and colleagues	3.1 State what is meant by positive body language  3.2 State the importance of avoiding negative body language  3.3 State why it is important to use eye contact and a smile when talking to customers and colleagues  3.4 State why it is important to use and react to body language when dealing with customers and colleagues

## Unit F/601/6079

### Contribute to effective customer service

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know customer service terms and language	1.1	Define key customer service terms and language
		1.2	Describe the connections between customer service, customer expectations and customer satisfaction
2	Know what contributes to good customer service in an organisation	2.1	Describe how company procedures contribute to good customer service
		2.2	Describe how good teamwork contributes to good customer service
		2.3	Describe the main points in a customer service process that influence customer satisfaction
3	Be able to work effectively with colleagues in a customer service team	3.1	Describe why friendliness and helpfulness are useful in customer service teamwork
		3.2	Describe the importance of not distracting colleagues when dealing with customers
		3.3	Identify what leads to effective team work
		3.4	Work effectively within a team when carrying out routine customer service tasks

## Unit F/601/6065

### Introduction to customer service

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know basic customer service terms	1.1	Describe the differences between an external and an internal customer
		1.2	State how different services and products could relate to each other and assist in providing customer satisfaction
		1.3	Identify regularly used customer service terms
2	Know the customer service process and its importance	2.1	Identify what is meant by customer expectations
		2.2	Identify what is meant by customer satisfaction
		2.3	State how customer satisfaction results from meeting customer expectations
		2.4	State the consequences if customer service does not meet customer expectations
		2.5	State why good customer service matters to organisations
3	Be able to learn from own experience of customer service	3.1	Identify situations when they are a customer
		3.2	Describe what matters to them when they are a customer

## Unit T/601/6080

### The customer service experience

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know about the customer service experience	1.1	Describe customer service situations
		1.2	Describe steps in a customer service process
		1.3	Describe the feelings of being a customer at different stages of the customer service process
2	Know how customer satisfaction is achieved	2.1	Describe the link between customer expectations and customer satisfaction
		2.2	Describe service delivery that provides customer satisfaction
		2.3	Describe customer service that does not meet customer expectations and the reasons why
3	Be able to demonstrate a positive attitude when dealing with customers	3.1	Demonstrate willingness when dealing with customers
		3.2	Speak clearly to customers and put them at their ease in different situations
		3.3	Recognise customer feelings and establish a rapport with them
		3.4	Show respect to customers
		3.5	Show reliability to customers

## Unit L/601/6067

### Working in a customer focused way

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know how to show a polite and willing approach to customers	1.1 State the importance of being positive and polite when dealing with customers
	1.2 State the importance of dealing with customers in appropriate timescale
	1.3 Identify what they can do to show the customer they are willing and enthusiastic
	1.4 State how to show customers reliability
2 Know how to show consideration to customers	2.1 State the importance of being considerate to customers
	2.2 Identify what impresses customers
	2.3 Identify what might annoy customers
	2.4 State how to put customers at ease
	2.5 State how to show respect to customers

**Unit A/601/6081**  
**Work in a customer-friendly way**

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to demonstrate a polite and willing approach to customers	1.1 Show good manners when dealing with customers 1.2 Greet customers politely and confidently 1.3 Deal with customers within an appropriate timescale 1.4 Respond willingly to customer requests 1.5 Work in a way that shows customers they are willing and enthusiastic
2 Be able to interact with customers in different situations	2.1 Recognise when a customer wants or needs attention 2.2 Respond when a customer wants or needs attention
3 Be able to demonstrate consideration for customer	3.1 Describe what might impress or annoy customers when carrying out routine customer service tasks 3.2 Carry out routine customer service tasks in a way that shows consideration to customers 3.3 Focus on customers and avoid distractions 3.4 Thank customers for their business or for information given



ProQual Awarding Body  
ProQual House  
Westbridge Court  
Annie Med Lane  
South Cave  
HU15 2HG

Tel: 01482 333850

Fax: 01482 333859

[www.proqualab.com](http://www.proqualab.com)

[enquiries@proqualab.com](mailto:enquiries@proqualab.com)