



Level 1 Certificate in Customer Service

Qualification Specification

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Introduction

The Level 1 Certificate in Customer Service qualification provides a nationally recognised qualification for anyone who is working or wants to work in a customer-facing role. The qualification will develop basic knowledge and skills such as communication, customer service and working in a business environment.

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 this qualification has been approved by the Welsh Government 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).

Qualification Profile Level 1 Certificate in Customer Service

Qualification title	ProQual Level 1 Certificate in Customer Service
Ofqual qualification number	601/4755/6
Level	1
Total qualification time	230 hours
Guided learning hours	143
Assessment	Pass or fail Internally assessed and verified by centre staff External quality assurance by ProQual verifiers
Qualification start date	1/11/2014
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 **23 credits**:

- **14 credits** from the **Mandatory units in Group A**, plus
- a minimum of **6 credits** from **Optional Group B**
- a maximum of **3 credits** may be from **Optional Group C**

Group A Mandatory Units – complete all units			
Unit Reference Number	Unit Title	Unit Level	Credit Value
L/506/2083	Understand working in a customer service environment	1	3
Y/506/2085	Communication in customer service	1	2
L/506/1791	Principles of personal performance and development	1	3
R/506/1792	Principles of working in a business environment	1	4
Y/506/1793	Work with others in a business environment	1	2
Group B Optional Units – a minimum of 6 credits			
Unit Reference Number	Unit Title	Unit Level	Credit Value
A/506/2094	Record details of customer service problems	1	3
A/506/2113	Deal with customer queries, requests and problems	1	3
T/506/2126	Communicate with customers in writing	2	3
H/506/2154	Deal with incoming telephone calls from customers	2	3
K/506/2155	Make telephone calls to customers	2	3
R/506/2134	Process information about customers	2	3
Group C Optional Units – a maximum of 3 credits			
Unit Reference Number	Unit Title	Unit Level	Credit Value
H/506/1795	Manage time and workload	1	1
A/506/1799	Meet and welcome visitors in a business environment	1	2
F/503/0392	Contribute to sales activities in a contact centre	1	3
F/503/0361	Use specific features of contact centre systems and technology	1	3
T/505/4673	Health and Safety Procedures in the Workplace	2	2
M/502/8587	Processing sales orders	2	2
R/502/8601	Meeting customers' after sales needs	2	3

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 quality assurance verifier who are suitably qualified for the specific occupational area. Assessors and internal quality assurance 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 Practice
- 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

Links to National Standards / NOS mapping

National Occupational Standards (NOS) are owned by a Sector Skills Council or Standard Setting Body and they describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The structure and units of this qualification are based on NOS for customer service.

Assessment

This suite of qualifications are 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 qualifications 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 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 Certificate in 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 L/506/2083
Understand working in a customer service environment

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the importance of customer service	1.1	State what is meant by “customer service”
		1.2	State why effective customer service is important to an organisation
2	Know the factors affecting customer service	2.1	Outline the difference between an internal and an external customer
		2.2	State how to identify customers’ needs and expectations
		2.3	List information sources needed to deliver reliable customer service
		2.4	Describe the relationship between customer expectations and customer satisfaction
3	Know how to work in a customer service role	3.1	Identify personal behaviours that can positively affect customers’ perceptions of an organisation and its products and/or services
		3.2	Identify the job roles within a team delivering customer service
		3.3	State the standards of personal presentation and behaviour expected by customer service staff in different organisations
		3.4	State standards and practices that relate to a service offer within different types of organisation
		3.5	Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
		3.6	Describe the procedures for protecting customers’ personal information and safety
		3.7	State the importance of protecting customers’ personal information and safety

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

- | | | | |
|---|---|-----|--|
| 4 | Know how to refer customer queries and problems to others | 4.1 | Describe types of customer behaviour that show when a customer is dissatisfied |
| | | 4.2 | State the procedures to be followed when dealing with customer queries or problems |
| | | 4.3 | State to whom to refer customer queries and problems |

Unit Y/506/2085

Communication in customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
<p>1 Know how to communicate in a customer service role</p>	<p>1.1 Describe different methods of communicating with customers and when it is appropriate to use them</p> <p>1.2 Give examples of positive and negative customer service language</p> <p>1.3 State the importance of speaking clearly</p> <p>1.4 Describe how tone of voice can affect how customers perceive their experience</p> <p>1.5 Describe how body language conveys what someone is thinking or feeling</p> <p>1.6 Define the term “active listening”</p> <p>1.7 List the types of information needed to communicate effectively with customers</p> <p>1.8 State why it is important to pass information and messages to colleagues</p>
<p>2 Be able to communicate with customers</p>	<p>2.1 Listen “actively” to what customers are saying</p> <p>2.2 Check their own understanding of customers’ needs</p> <p>2.3 Summarise information for customers</p> <p>2.4 Check that customers are satisfied with the information provided</p> <p>2.5 Follow organisational standards of behaviour and communication when interacting with customers</p> <p>2.6 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers</p>

Unit L/506/1791

Principles of personal performance and development

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know employees' rights and employers' expectations	1.1 State an organisation's expectations for the conduct of its employees
	1.2 State an employee's rights in relation to their employment
	1.3 State why it is important to work within employees' rights and employers' expectations
	1.4 State where to find information and advice on employees' rights and employers' expectations
2 Know how to manage their own work	2.1 Describe ways of managing allocated tasks to ensure they are completed on time
	2.2 State the purpose of keeping other people informed of progress and problems with work activities
	2.3 Explain the importance of accepting responsibility for one's own work
	2.4 State the limits of their own responsibilities at work
	2.5 State what to do when a problem arises with work activities
3 Know ways of managing and improving personal performance and development	3.1 State the purpose and benefits of personal development at work
	3.2 Describe the purpose of individual and team goals and targets
	3.3 Explain the use of personal development plans
	3.4 Explain the importance of fulfilling a personal development plan

Learning Outcome - The learner will:**Assessment Criterion - The learner can:**

- 3.5 Outline a manager's role in an individual's personal development
- 3.6 Outline relevant personal development opportunities and career paths within the organisation
- 3.7 Describe how acting on feedback can benefit a team and organisation

Unit R/506/1792

Principles of working in a business environment

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Know the purpose and structure of business organisations	1.1	State the purposes of different types of business organisations
		1.2	Explain why it is important for a business to be financially secure
		1.3	State the purposes of an organisational chart
		1.4	Describe the role of the main functional areas of business organisations
2	Know how to contribute to environmental sustainability within an organisation	2.1	State what is meant by “environmental sustainability”
		2.2	Explain why it is important to keep waste to a minimum
		2.3	Describe practices that may be used to minimise waste in a business environment
		2.4	State the standard procedures to be followed when recycling and disposing of waste
3	Know how to support equality and diversity within an organisation	3.1	State the meaning of the terms “equality” and “diversity”
		3.2	State why it is important to support equality and diversity in the work environment
		3.3	Describe ways of behaving that show sensitivity and respect for other people
		3.4	State the legal requirements relating to equality and diversity
4	Know the requirements of confidentiality and security in an organisation	4.1	State the importance of maintaining organisational standards of confidentiality

Learning Outcome - The learner will:**Assessment Criterion - The learner can:**

- 4.2 Outline how confidentiality requirements affect the workplace
- 4.3 State the importance of maintaining organisational standards of security
- 4.4 Outline how security requirements affect the workplace

Unit Y/506/1793

Work with others in a business environment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
<p>1 Know how to work with others in a business environment</p>	<p>1.1 Describe how their own role fits in with the role of others in their team</p> <p>1.2 Describe how their own behaviour can affect teamwork</p> <p>1.3 Describe behaviours that show trust, respect and consideration for others</p> <p>1.4 Outline the importance of following instructions when completing tasks</p> <p>1.5 State the importance of understanding authority at work</p> <p>1.6 State why it is important to behave in a way that does not cause conflict</p> <p>1.7 State what to do if problems occur when working with others</p> <p>1.8 Describe different ways to help colleagues with work activities</p>
<p>2 Be able to work with others in a business environment</p>	<p>2.1 Meet agreed deadlines, targets and quality standards</p> <p>2.2 Maintain expected standards of performance</p> <p>2.3 Act positively on feedback on own performance</p> <p>2.4 Treat others with courtesy and respect</p> <p>2.5 Follow organisational policies and procedures and legal requirements whilst working with others</p>

Unit A/506/2094

Record details of customer service problems

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
<p>1 Know how to process details of customers' problems</p>	<p>1.1 Describe how to recognise when customers are raising problems</p> <p>1.2 State why reference codes are used to identify customers and specific transactions</p> <p>1.3 Describe different types of questions to ask when processing details of customers' problems</p> <p>1.4 Describe how to behave and communicate with customers who are dissatisfied</p> <p>1.5 Describe when, why and to whom to refer customers' problems</p>
<p>2 Be able to gather and record details from customers who raise problems</p>	<p>2.1 Respond to customers calmly and professionally</p> <p>2.2 Take details that will identify individual customers</p> <p>2.3 Identify the nature and likely causes of problems</p> <p>2.4 Check their own understanding of what customers see as a problem</p> <p>2.5 Record details of customers' problems</p> <p>2.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with problems</p>
<p>3 Be able to refer details of customers' problems to colleagues</p>	<p>3.1 Refer customers' problems to the appropriate people</p> <p>3.2 Explain to customers what is happening, without making promises</p>

Unit A/506/2113

Deal with customer queries, requests and problems

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know how to deal with customer queries, requests and problems	1.1 List queries and requests that customers are likely to have 1.2 Describe how to identify customers' queries, requests and problems 1.3 Describe how to behave and communicate with customers who are dissatisfied 1.4 Describe the kinds of behaviour and communication that could make a situation worse 1.5 Describe when, why and from whom to obtain information or help 1.6 State to whom and when problems should be referred
2 Be able to deal with customers' queries and requests	2.1 Deal with queries and requests in a professional way 2.2 Provide customers with responses to their queries within the limits of their own authority 2.3 Obtain information or help when queries or requests cannot be answered 2.4 Keep customers informed of progress
3 Be able to deal with customers' problems	3.1 Identify the nature of customers' problems 3.2 Communicate with customers calmly and confidently 3.3 Resolve problems within the limits of their own authority

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

- 3.4 Brief colleagues when referring problems
- 3.5 Check that customers are satisfied with the actions taken
- 3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

Unit T/506/2126

Communicate with customers in writing

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to communicate with customers in writing	1.1 Explain why it is necessary to use different forms of written communication for different purposes 1.2 Describe practices for producing different forms of written communications 1.3 Describe the potential benefits and limitations associated with communicating with customers in writing 1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing
2 Be able to plan written communications to customers	2.1 Identify the objective(s) of the communication 2.2 Gather the information needed to draft the communication 2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer
3 Be able to communicate with customers in writing	3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone 3.2 Use language that is clear and concise, adapting it to meet identified customer needs 3.3 Record decisions and actions taken and the reasons for them 3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

Unit H/506/2154

Deal with incoming telephone calls from customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to deal with incoming customer calls	1.1 Explain why an organisation should have guidance on dealing with telephone calls
	1.2 Explain why an organisation should have an identity checking process
	1.3 Explain the importance of keeping customer information up to date
	1.4 Explain the importance of keeping customers informed of the progress of their call
	1.5 Describe how body language and facial expressions can be detected over the telephone
	1.6 Describe different questioning techniques used when dealing with incoming calls
	1.7 Explain how to handle abusive calls
2 Be able to establish the purpose of incoming customer calls	2.1 Verify the identity of callers in line with organisational guidelines
	2.2 Speak clearly, concisely and politely using speech and tone to create a rapport
	2.3 Adapt their own communication style to meet customers' needs
	2.4 Listen actively to what customers are saying to collect as much information as possible
	2.5 Use questioning techniques that are appropriate to the conversation
	2.6 Record information in line with organisational guidelines
3 Be able to deal with customer questions and requests	3.1 Respond in a way that best meets customer and organisational requirements

Learning Outcome - The learner will:**Assessment Criterion - The learner can:**

- 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

Unit K/506/2155

Make telephone calls to customers

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to make telephone calls to customers	1.1	Explain the legislation and regulations relating to the use of customer information when planning to make calls
		1.2	Explain the importance of keeping customer information up to date
		1.3	Explain the reasons for organisational guidance on dealing with telephone calls
		1.4	Explain the reasons for organisational identity checking processes
		1.5	Explain how body language and facial expressions can be detected over the telephone
		1.6	Describe different questioning techniques when dealing with customers
		1.7	Explain organisational guidelines for what can and cannot be said or promised
		1.8	Explain how to handle abusive calls from customers
2	Be able to plan telephone calls to customers	2.1	Identify the objective(s) of calls
		2.2	Prepare the information needed to make calls
		2.3	Plan the structure of calls
		2.4	Identify customers' likely responses and how they can be dealt with
3	Be able to make telephone calls to customers	3.1	Use telecommunications equipment in accordance with organisational standards
		3.2	Confirm the identity of customers in line with organisational guidelines
		3.3	Make the customer aware of the purpose of the call as early as possible

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

- 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

Unit R/506/2134

Process information about customers

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to process customer information	1.1	Describe the functions of customer information systems
		1.2	Explain the way in which legislation and regulatory requirements affect the processing of customer information
		1.3	Explain different responsibilities and levels of authority for processing customer service information
		1.4	Explain the reliability of sources of customer information
		1.5	Explain the validity of customer information
2	Be able to process customer information	2.1	Record information about customers in line with organisational standards and procedures
		2.2	Keep customer information up to date
		2.3	Respond to requests for customer information from authorised people in a timely manner
		2.4	Retrieve customer information that meets the requirements of the request
		2.5	Supply customer information in a format appropriate for the recipient
		2.6	Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

Unit H/506/1795

Manage time and workload

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
<p>1 Know how to manage their own time and workload</p>	<p>1.1 Describe ways of managing time and workload</p> <p>1.2 State why it is important to the organisation and the individual that time and workload are managed effectively</p> <p>1.3 State why it is important to seek work and offer help to others</p> <p>1.4 Describe how seeking help from colleagues can help in managing workload</p> <p>1.5 Describe why it is important to accept responsibility for their own mistakes</p>
<p>2 Be able to manage time and workload</p>	<p>2.1 Use time management techniques to manage the completion of tasks</p> <p>2.2 Finish tasks within the allotted timescale</p> <p>2.3 Inform team members of progress and developments of work activities</p> <p>2.4 Ask for work when existing tasks have been completed</p> <p>2.5 Report problems beyond their own level of authority to the appropriate person</p> <p>2.6 Follow organisational procedures and legal requirements when managing time and workload</p>

Unit A/506/1799

Meet and welcome visitors in a business environment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know how to meet visitors in a business environment	1.1 State an organisation's procedures for dealing with visitors 1.2 Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors 1.3 Identify any organisational health, safety and security requirements relevant to visitors 1.4 Describe what to do and who to contact when problems with visitors arise
2 Be able to meet visitors in a business environment	2.1 Welcome visitors politely in accordance with organisational standards 2.2 Confirm the identity of visitors and the reasons for their visit 2.3 Check that any health, safety and security actions are carried out 2.4 Record visitors' arrival and departure in accordance with organisational procedures 2.5 Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards 2.6 Present a positive personal image in accordance with organisational standards

Unit F/503/0392

Contribute to sales activities in a contact centre

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to gather and use specified sales information in a contact centre	1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures 1.2 Provide information to customers about products and/or services in accordance with organisational procedures 1.3 Collect from customer's information that supports potential sales in accordance with organisational procedures 1.4 Check with customers the accuracy of the information provided 1.5 Keep records of customers in accordance with organisational procedures
2 Be able to make direct sales to customers through a contact centre	2.1 Identify customers in accordance with organisational procedures 2.2 Establish customers' needs for potential sales of products and/or services within their level of authority 2.3 Check with customers the accuracy of the order 2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority 2.5 Complete the authorisation or payment in accordance with organisational procedures
3 Understand sales activities in a contact centre	3.1 List the products and/or services offered or supported by the contact centre 3.2 List the regulations and/or legislation that has an impact on dealing with customers 3.3 State the organisational procedures for processing sales and payments and/or establishing order authority with customers

Unit F/503/0361

Use specific features of contact centre systems and technology

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to use contact centre systems and technology to carry out customer contact tasks	1.1 Log into the technology system that is appropriate for dealing with customer contacts 1.2 Follow defined pathways through the system to complete customer contact tasks 1.3 Use features of the technology contact handling system to control customer contacts 1.4 Locate information on the system needed to complete a customer contact 1.5 Identify to whom to refer when the customer contact cannot be completed 1.6 Input information into the system in accordance with organisational procedures 1.7 Validate the customer's identity from information given and information held on the system
2 Understand contact centre systems and technology	2.1 State the organisational procedures and guidelines for handling customer contacts 2.2 List the products and/or services offered or supported by the contact centre 2.3 List the regulation and/or legislation relevant to the contact centre's work with customers 2.4 State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle 2.5 State the procedures for logging onto the technology systems 2.6 State how to respond to prompts from the system indicating the pathway to be followed

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

- 2.7 State how to use systems and technology to handle customer contacts
- 2.8 Identify the categories of customer contacts that they are authorised to handle

Unit T/505/4673

Health and Safety Procedures in the Workplace

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
<p>1 Know health and safety procedures in the workplace.</p>	<p>1.1 Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees.</p> <p>1.2 Describe two health and safety laws affecting the workplace.</p> <p>1.3 Define the importance of following health and safety procedures in the workplace.</p> <p>1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.</p>
<p>2 Be able to carry out tasks with regard to health and safety in the workplace.</p>	<p>2.1 Carry out a risk assessment of a specified workplace activity.</p> <p>2.2 Use equipment or tools safely in the workplace.</p> <p>2.3 Describe how to prevent accidents in the workplace.</p> <p>2.4 Assess how own health and safety practices could be improved.</p>

Unit M/502/8587

Processing sales orders

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing 1.2 Describe organisational processes for ordering products and/or services 1.3 Describe different sources of information used to check customer credit 1.4 Describe the different payment methods accepted by sales orientated organisations 1.5 Explain the role of the despatch function 1.6 Describe service standards relating to sales order completion 1.7 Explain the importance of storing information securely
2 Be able to process sales orders	2.1 Identify customer sales order requirements 2.2 Check that the credit status of the customer meets organisational standards 2.3 Confirm the availability of products and/or services to the customer 2.4 Ensure that information given to the customer about delivery, timing and price is accurate 2.5 Ensure that the sale is authorised following the organisation's procedures 2.6 Finalise the transaction in accordance with organisational procedures 2.7 Ensure that the customer is aware of the terms and conditions of sale

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

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| | 2.8 | Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders |
| | 2.9 | Identify who to go to when in need of support with sales order processing problems |
| 3 | | Be able to follow up sales order processing |
| | 3.1 | Keep the customer informed of the sales order progress and any problems with the sale order |
| | 3.2 | Advise the customer of current discounts and special offers |
| | 3.3 | Check all information is stored securely |

Unit R/502/8601

Meeting customers' after sales needs

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to investigate customer after sales needs	1.1	Establish the nature of customers' after sales needs
		1.2	Communicate with customers in a way that conforms with quality and customer service standards at all times
2	Be able to handle customers' after sales needs	2.1	Deal with customers' after sales needs following organisational customer service standards and procedures
		2.2	Balance customers' needs with those of the organisation
		2.3	Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority
		2.4	Fulfil commitments made to customers in accordance with quality and customer service standards
		2.5	Record commitments made to customers
3	Be able to review the after sales process	3.1	Obtain customers' comments on service reliability from customers
		3.2	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



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