



Level 2 Certificate in Principles of Customer Service

Qualification Specification

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Introduction

The Level 2 Certificate in Principles of Customer Service qualification provides a nationally recognised qualification for anyone working in a customer-facing role. It will also build learners' knowledge of the principles of customer service.

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) and provides a progression route to higher level or discipline related qualifications.

Qualification Profile

Level 2 Certificate in Principles of Customer Service

Qualification title	ProQual Level 2 Certificate in Principles of Customer Service
Ofqual qualification number	601/4768/4
Level	2
Total qualification time	150
Guided learning hours	135
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 complete the 3 Mandatory units.

Mandatory Units – complete all units		
Unit Reference Number	Unit Title	Unit Level
R/506/4854	Understanding the organisation	2
Y/506/4855	Prepare to deliver excellent customer service	2
K/503/0323	Communication in the customer service role	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 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 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

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 in this document.

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 requirements for qualifications will be awarded:

- A certificate listing all units achieved, and
- A certificate giving the full qualification title -

ProQual Level 2 Certificate in Principles of Customer Service

Claiming certificates

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the requirements 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 required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units 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/506/4854

Understanding the organisation

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the factors that affect an organisation and the customer service role	<ul style="list-style-type: none">1.1 Describe the products and services of commercial, public and third sector organisations1.2 Describe the differences in customer service between commercial, public and third sector organisations1.3 Outline the role played by the customer service occupation within the organisation and industry1.4 Identify the major competitors of the organisation1.5 Identify factors that can affect the reputation of the organisation
2 Understand employee rights, responsibilities and organisational procedures	<ul style="list-style-type: none">2.1 State employer and employee rights and responsibilities under employment law and the importance of having these2.2 Detail employer and employee rights and responsibilities under current workplace Health and Safety legislation2.3 Describe the organisations procedures for health and safety and documentation used2.4 Outline how current Equality law relates to employment2.5 Identify other key legislation relating to industry and the organisation2.6 Describe organisational procedures for equality and diversity detailing any monitoring and documentation activity
3 Understand career pathways within customer service	<ul style="list-style-type: none">3.1 Describe the main career pathways available within a customer service role3.2 Identify sources of information and advice available on the customer service industry, occupations and career progression3.3 Identify methods of learning available in the organisation to assist in career progression3.4 Identify the procedure for accessing formal learning programmes and the procedure for challenging refusal if available3.5 Explain how new customer service situations can aid self development and career progression
4	<ul style="list-style-type: none">4.1 Identify sources of information and advice on employment rights and responsibilities

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
Understand how employees are supported within the customer service role	4.2 Identify types of representative body related to the industry 4.3 Detail the main roles and responsibilities of each representative body and their relevance to the industry 4.4 Outline sources of support for their role within the organisation to include issues relating to: <ul style="list-style-type: none"> • equality • health and safety • career progression
5 Know the organisation's policies and procedures	5.1 Describe the main principles, policies and procedures of their organisation and its documentation 5.2 Explain how the organisation's principles are disseminated to employees 5.3 Outline relevant policies and codes of practice adopted by the organisation and how employees are made aware of these 5.4 Explain how employees are consulted on changes to the principles, procedures and policies within the organisation 5.5 Identify issues of public concern relating to their industry and organisation and how these are dealt with

Unit Y/506/4855

Prepare to deliver excellent customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the principles of customer service in an organisation	<ol style="list-style-type: none">1.1 Describe the organisation's products and services1.2 Explain how customers are made aware of the organisation's offer1.3 Identify the customers of the organisation1.4 Explain how to keep up to date with the organisation's offer1.5 Describe the organisation's policies and procedures relating to customer service and the importance of following them1.6 Describe the publicity available about the organisation's products and services1.7 Describe the implications of poor customer service in commercial, public sector and third sector organisations
2 Understand how customer needs and expectations are identified	<ol style="list-style-type: none">2.1 Outline ways in which customer expectations can be identified2.2 Identify how customer expectations can be met within the offer of the organisation2.3 Describe how to tell customers that their needs cannot be met by the organisation2.4 Identify reasons for customer service being delayed and the impact of this on customers2.5 Outline how to tell customers that the service will be delayed2.6 Explain why it is important to keep customers informed of progress and delays when dealing with a complaint
3 Understand how to balance customer expectations against the organisation's offer	<ol style="list-style-type: none">3.1 Outline the customer service offers of two organisations to include,<ul style="list-style-type: none">• one commercial organisation• one public or third sector organisation3.2 Explain how resource and financial implications reflect on the organisation's offer and customers' expectations3.3 Explain how customers' expectations are arrived at within their organisation's offer3.4 Identify examples of when customer service may be limited by organisational goals3.5 Describe how to tell a customer that their service expectations are outside of the organisation's offer

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
4 Understand how complaints are handled	4.1 Explain why customers may complain to or about an organisation 4.2 Outline the complaints handling procedure in the organisation 4.3 Identify ways in which complaints may be defused prior to escalation to include: <ul style="list-style-type: none"> • face to face • written (letter, email) • via the telephone 4.4 Outline the effects of complaints on commercial, public sector and third sector organisations 4.5 Explain why complaints are monitored and how the monitoring is used
5 Understand legislation relating to customer service	5.1 Identify customer related legislation and external regulations and how these may affect customer service 5.2 Outline how business service improvements might be limited by legislation 5.3 Explain how current workplace Health and Safety laws are relevant to customer service 5.4 Explain individual health and safety responsibilities while delivering customer service 5.5 Identify ways in which the security of customers and their property can be protected 5.6 Describe how to gain approval to change customer service procedures or practices that are affected by legislation

Unit K/503/0323

Communication in the customer service role

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand methods of communication with customers	1.1 Outline why different situations need different methods of communication 1.2 Identify communication methods suitable for a series of customer interactions 1.3 Identify the advantages and disadvantages of the main communication methods to customers to include: <ul style="list-style-type: none"> • Face to face • In writing • Via telephone 1.4 Outline the content of a standard letter in response to a customer query 1.5 Explain what is meant by active listening and its importance when dealing with customers 1.6 Describe the standard greetings of three different organisations and how they impact on customers
2 Understand how to handle customer service information	2.1 Explain what information may be held about customers by an organisation 2.2 Outline how customer information is kept secure and confidential 2.3 Identify information about the organisation that should not be disclosed to customers 2.4 Explain why certain information should not be disclosed to customers and the implications on the organisation if it is
3 Understand how to work as part of a team to provide effective customer service	3.1 Outline limits of individual role when delivering customer service 3.2 Identify others involved in the customer service function 3.3 Identify sources of assistance for queries outside individual responsibility 3.4 Explain how other team members can assist in offering excellent customer service 3.5 Explain the importance of keeping colleagues and others informed of customer service operations 3.6 Outline how customer queries can aid individual and colleagues' development 3.7 Explain how to disseminate customer service information for the benefit of colleagues
4 Understand how to meet the needs of a diverse range of customers	4.1 Identify the main types of customer that may need to be dealt with

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
	<p>4.2 Describe the aids available to assist customers with special requirements</p> <p>4.3 Outline how to respect cultural diversity in customer service</p> <p>4.4 Explain how to recognise the following types of customer:</p> <ul style="list-style-type: none"> • Angry • Distressed • Upset • Violent <p>4.5 Explain how to deal with customers who are;</p> <ul style="list-style-type: none"> • Angry • Distressed • Upset • Violent
<p>5 Understand the importance of promoting and evaluating products and services</p>	<p>5.1 Detail how products and services can be promoted in an organisation</p> <p>5.2 Explain the importance of evaluating customer service</p> <p>5.3 Identify methods of evaluation of the customer experience that may be used</p> <p>5.4 Detail how customer feedback is disseminated to colleagues</p> <p>5.5 Explain how evaluation can lead to customer service improvements</p>



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