



Level 3 Diploma in Customer Service

Qualification Specification

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Introduction

The Level 3 Diploma in Customer Service qualification provides a nationally recognised qualification for anyone working in a customer-facing role.

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 3 Diploma in Customer Service

Qualification title	ProQual Level 3 Diploma in Customer Service
Ofqual qualification number	601/3577/3
Level	3
Total qualification time	550 hours
Guided learning hours	289
Assessment	Pass or fail Internally assessed and verified by centre staff External quality assurance by ProQual verifiers
Qualification start date	1/9/2014
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 **55 credits**:

- **31 credits** from the **Mandatory units in Group A**, plus
- a minimum of **15 credits** from **Optional Group B**
- a maximum of **9 credits** may be from **Optional Group C**

Group A Mandatory Units – complete all units			
Unit Reference Number	Unit Title	Unit Level	Credit Value
L/506/2150	Organise and deliver customer service	3	5
Y/506/2152	Understand the customer service environment	3	5
K/506/2169	Resolve customers' problems	3	4
D/506/1942	Principles of business	3	10
T/506/2952	Manage personal and professional development	3	3
J/506/2910	Understand customers and customer retention	3	4
Group B Optional Units – a minimum of 15 credits			
Unit Reference Number	Unit Title	Unit Level	Credit Value
Y/506/2166	Develop resources to support consistency of customer service delivery	3	5
D/506/2167	Use service partnerships to deliver customer service	3	3
R/506/2151	Resolve customers' complaints	3	4
D/506/2170	Gather, analyse and interpret customer feedback	3	5
K/506/2172	Monitor the quality of customer service interactions	3	5
D/506/2119	Communicate verbally with customers	2	3
T/506/2126	Communicate with customers in writing	2	3
L/506/2133	Promote additional products and/or services to customers	2	2
Y/506/2135	Exceed customer expectations	2	3
T/506/2143	Deliver customer service whilst working on customers' premises	2	4
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
J/506/2163	Use social media to deliver customer service	2	3
D/506/2153	Champion customer service	4	4
R/506/2179	Build and maintain effective customer relations	4	6
L/506/2181	Manage a customer service award programme	4	4
Y/506/2183	Manage the use of technology to improve customer service	4	4
D/506/2962	Develop a social media strategy for customer service	4	5
H/506/2977	Support customers using self-service equipment	2	3
K/506/2978	Provide post-transaction customer service	2	5

Group C Optional Units – a maximum of 9 credits			
Unit Reference Number	Unit Title	Unit Level	Credit Value
H/506/1912	Negotiate in a business environment	3	4
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3
A/506/1821	Manage team performance	3	4
J/506/1921	Manage individuals' performance	3	4
M/506/1931	Collaborate with other departments	3	3
F/502/8612	Negotiating, handling objections and closing sales	3	4
R/502/8615	Obtaining and analysing sales-related information	3	4
K/502/8622	Buyer behaviour in sales situations	3	3
K/503/0418	Manage incidents referred to a contact centre	3	6
D/503/0397	Lead direct sales activities in a contact centre team	3	4
L/506/1807	Manage diary systems	2	2
L/506/1869	Contribute to the organisation of an event	2	3
H/506/1814	Provide reception services	2	3
M/506/1895	Buddy a colleague to develop their skills	2	3
L/506/1905	Employee rights and responsibilities	2	2
M/502/8587	Processing sales orders	2	2
J/502/4397	Bespoke Software	3	4

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

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 9 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 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 3 Diploma 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/506/2150

Organise and deliver customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to organise customer service delivery	<ul style="list-style-type: none">1.1 Explain how different methods of promoting products and/or services impact on customer service delivery1.2 Explain who should be involved in the organisation of customer service delivery1.3 Explain the importance of differentiating between customers' wants, needs and expectations1.4 Explain different ways of segmenting customer groups1.5 Explain how customer segmentation is used in organising customer service delivery1.6 Explain how to analyse the "customer journey"
2 Be able to plan the delivery of customer service	<ul style="list-style-type: none">2.1 Identify customers' needs and expectations2.2 Map the "customer journey"2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service2.4 Prepare the resources needed to deliver products and/or services to different types of customers2.5 Plan how to deal with unexpected additional workloads2.6 Allocate priorities to address points of service failure
3 Be able to deliver customer service	<ul style="list-style-type: none">3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives3.2 Agree realistic and achievable actions with customers3.3 Identify areas for improvement in their own customer service delivery3.4 Adapt their own customer service delivery to meet customers' changing expectations

Unit Y/506/2152

Understand the customer service environment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the concepts and practices underpinning customer service delivery	<ul style="list-style-type: none">1.1 Explain the value of customer service as a competitive tool1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service1.3 Describe techniques used to identify service failures1.4 Explain the concept and importance of the service profit chain1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service
2 Understand the relationship between customer service and a brand	<ul style="list-style-type: none">2.1 Explain the importance of a brand to customers and to an organisation2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services2.3 Explain the potential impact of good and poor customer service on a brand
3 Understand the structure of customer service	<ul style="list-style-type: none">3.1 Explain the features of different customer service models and customer service standards3.2 Explain the relationship between customer service and operational areas of an organisation3.3 Explain the relationship between customer service and continuous improvement processes3.4 Explain the costs and benefits of customer service to an organisation3.5 Explain the impact of organisational values on how customers create their expectations3.6 Explain how organisational values impact on meeting customer expectations
4 Understand the implications of legislation on customer service delivery	<ul style="list-style-type: none">4.1 Explain the implications of consumer-related legislation on customer service delivery4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

Unit K/506/2169

Resolve customers' problems

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the monitoring and resolution of customers' problems	1.1 Assess the suitability of a range of techniques for monitoring customer problems 1.2 Explain how to use the resolution of customers' problems to improve products and/or services 1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance 1.4 Explain the features of negotiating techniques used to resolve customers' problems
2 Be able to deal with customers' problems	2.1 Confirm the nature and cause of customers' problems 2.2 Explain when customers' problems should be treated as complaints 2.3 Explain the benefits to customers and the organisation of the options available to solve problems 2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems 2.5 Explain to customers the options for resolving their problems 2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority 2.7 Inform colleagues of the nature of problems and actions taken 2.8 Evaluate the effectiveness of the resolution of customers' problems 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

Unit D/506/1942

Principles of business

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand business markets	1.1 Explain the characteristics of different business markets 1.2 Explain the nature of interactions between businesses within a market 1.3 Explain how an organisation's goals may be shaped by the market in which it operates 1.4 Describe the legal obligations of a business
2 Understand business innovation and growth	2.1 Define business innovation 2.2 Explain the uses of models of business innovation 2.3 Identify sources of support and guidance for business innovation 2.4 Explain the process of product or service development 2.5 Explain the benefits, risks and implications associated with innovation
3 Understand financial management	3.1 Explain the importance of financial viability for an organisation 3.2 Explain the consequences of poor financial management 3.3 Explain different financial terminology
4 Understand business budgeting	4.1 Explain the uses of a budget 4.2 Explain how to manage a budget
5 Understand sales and marketing	5.1 Explain the principles of marketing 5.2 Explain a sales process 5.3 Explain the features and uses of market research 5.4 Explain the value of a brand to an organisation 5.5 Explain the relationship between sales and marketing

Unit T/506/2952

Manage personal and professional development

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to identify personal and professional development requirements	<ul style="list-style-type: none">1.1 Compare sources of information on professional development trends and their validity1.2 Identify trends and developments that influence the need for professional development1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
2 Be able to fulfil a personal and professional development plan	<ul style="list-style-type: none">2.1 Evaluate the benefits of personal and professional development2.2 Explain the basis on which types of development actions are selected2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives2.5 Execute the plan within the agreed budget and timescale2.6 Take advantage of development opportunities made available by professional networks or professional bodies
3 Be able to maintain the relevance of a personal and professional development plan	<ul style="list-style-type: none">3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives3.2 Obtain feedback on performance from a range of valid sources3.3 Review progress toward personal and professional objectives3.4 Amend the personal and professional development plan in the light of feedback received from others

Unit J/506/2910

Understand customers and customer retention

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand Customer Relationship Management (CRM)	<ul style="list-style-type: none">1.1 Explain the concept of the “customer experience”1.2 Explain different methods of segmenting and characterising customers1.3 Explain the purpose and scope of CRM1.4 Describe the features of an effective CRM system1.5 Explain the uses of CRM data in customer service delivery
2 Understand customer retention	<ul style="list-style-type: none">2.1 Explain the term customer retention2.2 Explain the benefits of customer retention to an organisation2.3 Explain the factors that influence customer retention2.4 Describe techniques used to attract and retain customers2.5 Explain how to assess the extent of customer loyalty2.6 Explain the factors involved in customer recovery
3 Understand the measurement of customer satisfaction	<ul style="list-style-type: none">3.1 Describe techniques used to analyse performance data3.2 Explain the factors to be taken into account in setting performance targets and objectives3.3 Explain the features and uses of a range of techniques to measure customer satisfaction

Unit Y/506/2166

Develop resources to support consistency of customer service delivery

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how knowledge resources are used to support customer service delivery	<ul style="list-style-type: none">1.1 Explain the structure of a customer service knowledge base1.2 Explain the uses of a customer service knowledge base1.3 Explain the use of customers' frequently asked questions to support customer service delivery1.4 Explain the input and update routines for adding to the knowledge base1.5 Explain the content requirements of resource materials and how they should be expressed
2 Be able to create and maintain a customer service knowledge base	<ul style="list-style-type: none">2.1 Identify the information that should be included in a customer service knowledge base2.2 Confirm that a knowledge base is kept up to date2.3 Promote the contents and use of a knowledge base
3 Be able to develop customer service resource materials	<ul style="list-style-type: none">3.1 Describe the types of questions frequently asked by customers3.2 Identify the types of resources needed to support customer service delivery from an analysis of customer needs3.3 Identify who will use the resources and in what way3.4 Develop resources that meet organisational requirements3.5 Communicate the availability and nature of the resources to those who will use them

Unit D/506/2167

Use service partnerships to deliver customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the use of a service partnership in customer service delivery	<ul style="list-style-type: none">1.1 Explain the roles and responsibilities of the partners involved in a service chain1.2 Explain the advantages and limitations of using a service partnership1.3 Explain the use and value of formal and informal service level agreements
2 Understand ways of building relationships within a customer service partnership	<ul style="list-style-type: none">2.1 Describe effective communication methods for dealing with service partners2.2 Explain how to develop positive relationships with service partners2.3 Describe negotiating techniques for dealing with service partners2.4 Describe actions that can be taken to resolve any conflict of interest with service partners
3 Be able to deliver customer service within a customer service partnership	<ul style="list-style-type: none">3.1 Identify the levels of authority that exist within a service partnership3.2 Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery3.3 Establish service procedures that are acceptable to all members of a service partnership3.4 Agree with service partners priorities and resolutions relating to conflicts of interest3.5 Identify areas for improvement from the analysis of a range of sources of information

Unit R/506/2151

Resolve customers' complaints

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery 1.3 Explain negotiating techniques used to resolve customers' complaints 1.4 Explain conflict management techniques used in dealing with upset customers 1.5 Explain organisational procedures for dealing with customer complaints 1.6 Explain when to escalate customers' complaints 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services
2 Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints 2.2 Take personal responsibility for dealing with complaints 2.3 Communicate in a way that recognises customers' problems and understands their points of view 2.4 Explain the advantages and limitations of different complaint response options to customers 2.5 Explain the advantages and limitations of different complaint response options to the organisation 2.6 Keep customers informed of progress 2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority 2.8 Record the outcome of the handling of complaints for future reference 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

Unit D/506/2170

Gather, analyse and interpret customer feedback

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to gather, analyse and interpret customer feedback	<ul style="list-style-type: none">1.1 Describe methods of collecting data for customer research1.2 Explain random sampling techniques used to collect data1.3 Explain how to evaluate bias in non-random samples1.4 Explain the principles of questionnaire design1.5 Assess the suitability of a range of techniques to analyse customer feedback1.6 Explain techniques used to monitor the quality of data collected1.7 Explain the use of software to record and analyse customer feedback1.8 Explain the validation issues associated with customer feedback1.9 Explain the importance of anonymising comments from customers who do not wish to be identified
2 Be able to plan the collection of customer feedback on customer service issues	<ul style="list-style-type: none">2.1 Identify the objectives of collecting customer feedback2.2 Justify the reasons for selecting different data collection methods2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
3 Be able to gather customer feedback	<ul style="list-style-type: none">3.1 Collect customer feedback using the sampling frame identified in a customer service plan3.2 Record data in a way that makes analysis straightforward3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures
4 Be able to analyse and interpret customer feedback to recommend improvements	<ul style="list-style-type: none">4.1 Use data analysis methods to identify patterns and trends in customer feedback4.2 Use the findings of a data analysis to identify areas for improvement to customer service4.3 Present the findings of an analysis in the agreed format4.4 Recommend improvements in response to the findings of an analysis

Unit K/506/2172

Monitor the quality of customer service interactions

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to monitor the quality of customer service interactions	<ul style="list-style-type: none">1.1 Describe techniques for monitoring the quality of customer service interactions1.2 Explain organisational procedures and guidelines for customer service delivery1.3 Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions1.4 Explain how to construct a representative sample of customer service interactions for monitoring purposes1.5 Explain how data protection legislation applies to monitoring the quality of customer service interactions1.6 Explain how monitoring actions taken can identify possible improvements in customer service interactions1.7 Explain techniques to gather customer feedback
2 Be able to prepare to monitor the quality of customer service interactions	<ul style="list-style-type: none">2.1 Identify the criteria against which the quality of customer service interactions will be monitored2.2 Specify a sampling frame that would provide information to meet monitoring objectives2.3 Select monitoring techniques that are capable of collecting the required information2.4 Ensure that staff and customers are made aware of the fact that they will be monitored
3 Be able to monitor the quality of customer service interactions	<ul style="list-style-type: none">3.1 Monitor the quality of customer service interactions with minimal disruption to business3.2 Assess the quality of customer service interactions against agreed criteria3.3 Identify patterns and trends in colleagues' performance3.4 Give constructive feedback to colleagues on the quality of customer service interactions

Unit D/506/2119

Communicate verbally with customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to communicate verbally with customers	1.1 Explain the importance of effective communication in customer service 1.2 Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience 1.3 Explain why “customer service language” is used 1.4 Describe different questioning techniques that can be used when communicating with customers 1.5 Describe verbal and non-verbal signals that show how a customer may be feeling 1.6 Describe the types of information needed when communicating verbally with customers
2 Be able to use customer service language to communicate with customers	2.1 Identify customers’ wants and priorities 2.2 Listen “actively” to what customers are saying 2.3 Communicate clearly, concisely and professionally with customers 2.4 Use a tone of voice and expression that reinforces messages when communicating with customers 2.5 Use language that reinforces empathy with customers 2.6 Adapt their response in accordance with customers’ changing behaviour 2.7 Provide information and advice that meets customers’ needs 2.8 Maintain organisational standards of behaviour and communication when interacting with customers 2.9 Check that customers have understood what has been communicated 2.10 Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

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 L/506/2133

Promote additional products and/or services to customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the promotion of additional products and/or services to customers	<ul style="list-style-type: none">1.1 Describe organisational policies and procedures on the promotion of additional products and/or services1.2 Explain the importance of keeping product/service knowledge up to date1.3 Explain how to match products and/or services to customer needs1.4 Describe techniques to promote additional products and/or services
2 Be able to promote additional products and/or services to customers	<ul style="list-style-type: none">2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers2.3 Provide information to customers that will help them to decide whether to select additional products and/or services2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

Unit Y/506/2135

Exceed customer expectations

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to exceed customer expectations	1.1 Explain how customers form expectations of the service they will receive 1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3 Explain the types of actions that customers are likely to perceive as adding value 1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer
2 Be able to exceed customer expectations	2.1 Identify differences between customers' expectations and needs and the service offer 2.2 Explain the service offer clearly and concisely to customers 2.3 Identify options that offer added value without affecting other customers adversely 2.4 Make offers to customers within their own authority levels 2.5 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

Unit T/506/2143

Deliver customer service whilst working on customers' premises

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to deliver customer service whilst working on customers' premises	<ul style="list-style-type: none">1.1 Describe the preparations that need to be made prior to a visit1.2 Explain the importance of being positive about the product and/or service1.3 Explain organisational standards of presentation, behaviour and communication1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed1.5 Explain how to identify possible risks relating to the work to be carried out1.6 Explain the way in which legislation affects the work to be carried out
2 Be able to deliver customer service whilst working on customers' premises	<ul style="list-style-type: none">2.1 Identify themselves to customers2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises2.3 Confirm with customers the nature of work to be carried out on their premises2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed2.5 Treat customers, their premises and property with consideration2.6 Confirm that the customer is satisfied with the outcome2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises

Unit F/506/2159

Deliver customer service to challenging customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the delivery of customer service to challenging customers	<ul style="list-style-type: none">1.1 Describe different types of challenging customers in the customer service environment1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers1.3 Explain behaviours that make it challenging to deal with customers1.4 Explain the difference between assertive and aggressive behaviour1.5 Describe techniques to deal with customers' challenging behaviour1.6 Explain their own levels of authority for agreeing actions outside the service offer1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters
2 Be able to deal with challenging customers	<ul style="list-style-type: none">2.1 Identify the signs that indicate that a customer is challenging2.2 Express understanding of customers' point of view without admitting liability2.3 Explain to customers the limits of the service they can offer2.4 Explain to customers the reasons for an organisation's position and policy2.5 Agree a way forward that balances customer satisfaction and organisational needs2.6 Obtain help from colleagues when options for action are beyond their level of authority2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Unit Y/506/2149

Develop customer relationships

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers 1.2 Explain the value of customer loyalty and retention 1.3 Explain how customers' expectations may change over time 1.4 Explain the use of customer feedback as a means of developing customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers 1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships
2 Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback 2.3 Share feedback from customers with others 2.4 Identify added value that the organisation could offer customers 2.5 Bring to customers' attention products or services that may interest them

Unit T/506/2160

Support customer service improvements

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to support customer service improvements	1.1 Describe different sources of information that may help identify ways of improving customer service 1.2 Describe the constraints on suggesting improvements to customer service 1.3 Explain the limits of their own authority in implementing improvements
2 Be able to identify the potential for improvements to customer service	2.1 Use information from a range of sources to understand the customer experience 2.2 Identify potential areas where customer service could be improved from an analysis of information 2.3 Make recommendations for improvement that are based on evidence from analysed information
3 Be able to support the implementation of improvements to customer service	3.1 Implement agreed improvements within the limits of their own authority 3.2 Inform customers of improvements to customer service 3.3 Identify the impact of improvements to customer service and feedback to relevant people

Unit A/506/2161

Support customers through real-time online customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to support customers through real-time online customer service	<ul style="list-style-type: none">1.1 Explain how an organisation's online customer service system works1.2 Explain how to navigate their own customer service site1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services1.4 Explain how to adapt their own communication style to meet customers' ability to use online systems
2 Be able to establish the customer service support needed by customers	<ul style="list-style-type: none">2.1 Identify customers' familiarity with the site2.2 Identify the difficulties faced by customers when navigating websites2.3 Identify the support for customers that will meet their needs
3 Be able to support online customer service in real-time	<ul style="list-style-type: none">3.1 Step through screen sequences while the customer operates the system3.2 Communicate with customers in terms they can understand3.3 Inform customers of what is happening and why certain steps are required3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Unit J/506/2163

Use social media to deliver customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand social media in a business environment	<ul style="list-style-type: none">1.1 Explain how different social media platforms can be used for customer service1.2 Describe different audience groups for a range of social media platforms1.3 Explain the importance of monitoring customer posts in social media networks1.4 Explain organisational policy and guidelines for the use of social media for customer service purposes1.5 Explain the etiquette of communication within different social media platforms1.6 Explain the importance of security settings and how they are used on different social media platforms1.7 Identify the information that can be shared when colleagues are involved in exchanges using social media
2 Be able to deal with customers using social media	<ul style="list-style-type: none">2.1 Monitor social media to identify customer questions, requests and comments2.2 Make responses that are appropriate to posts made by customers on social media networks2.3 Take action to ensure that customers are satisfied before closing dialogue2.4 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

Unit D/506/2153

Champion customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to champion customer service	1.1 Evaluate the importance of viewing operations from the customer's viewpoint 1.2 Analyse the role of service partners in providing customer service 1.3 Evaluate the effectiveness of information collection systems and reports 1.4 Describe organisational decision-making processes and limits of their own authority 1.5 Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements 1.6 Describe activities that give added value to the service chain
2 Be able to identify the scope for improvements to customer service	2.1 Monitor customer service delivery to identify issues that are important to customer service 2.2 Analyse the implications of improvements to customer service 2.3 Identify customer service issues relating to new products and/or services 2.4 Identify the strategic and managerial implications of changes to customer service and the service offer
3 Be able to champion customer service	3.1 Promote the role of customer service within an organisation's operational plans 3.2 Inform individual staff members about their role in championing customer service 3.3 Promote the benefits of effective customer service 3.4 Provide validated customer service advice and information to colleagues 3.5 Support others to identify areas for improvement to customer service 3.6 Monitor the effectiveness of advice and information given 3.7 Take actions to ensure that customer service delivery meets agreed standards

Unit R/506/2179

Build and maintain effective customer relations

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to build effective relationships with customers	<ul style="list-style-type: none">1.1 Analyse stakeholder mapping techniques1.2 Analyse the features of influencing techniques1.3 Explain how influencing techniques can be used to improve the relationship with customers1.4 Evaluate the benefits and value of relationships with customers and customer loyalty1.5 Explain how techniques to manage expectations are applied to the management of customers1.6 Explain different types of acceptable compromise1.7 Evaluate the benefits of adopting a “customer-centred” approach
2 Be able to determine the scope for building effective relationships with customers	<ul style="list-style-type: none">2.1 Identify the customers with whom relationships should be developed2.2 Identify the interests and concerns of customers with whom relationships should be developed2.3 Evaluate the scope for and limitations of building relationships with different types of customer
3 Be able to develop effective relationships with customers	<ul style="list-style-type: none">3.1 Behave in a way that creates mutual trust and respect3.2 Provide information and perform actions within agreed timescales3.3 Take account of feedback provided by customers3.4 Keep customers up to date with new products and/or services and developments3.5 Assess regularly the extent to which customers’ expectations are met3.6 Use personal influence and authority to ensure that customer needs are met or exceeded
4 Be able to review and improve relationships with customers	<ul style="list-style-type: none">4.1 Monitor customer relationships and developments4.2 Take action to ensure that others complete agreed actions within agreed timescales4.3 Address changes to customer service methods that may have an effect on customer relationships4.4 Collect feedback from customers on their levels of satisfaction4.5 Recommend improvements to customer service based on analyses of the effectiveness of customer relationships

Unit L/506/2181

Manage a customer service award programme

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the management of a customer service award programme	1.1 Justify the reasons for an award programme 1.2 Explain how to make use of a customer service award programme as a promotional tool 1.3 Explain the likely impact of organisational culture on a customer service award programme 1.4 Explain the requirements of a business case for a customer service award programme
2 Be able to plan a customer service award programme	2.1 Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme 2.2 Evaluate the benefits, drawbacks and costs of different options for a customer service award programme 2.3 Select the option that best meets the objectives of the award programme 2.4 Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales 2.5 Develop award criteria that are transparent and fair
3 Be able to manage a customer service award programme	3.1 Promote the award programme with the dual purpose of motivating team members and engaging customers 3.2 Take action to ensure that award winners are recognised in a way that demonstrates organisational commitment to excellent customer service 3.3 Evaluate the effectiveness of a customer service award programme

Unit Y/506/2183

Manage the use of technology to improve customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to manage the use of technology to improve customer service	<ul style="list-style-type: none">1.1 Analyse developments in information and communication technology that relate to customer service1.2 Analyse the features, functions and implications of technology for customer service delivery1.3 Explain how to monitor the use of technology to improve customer service
2 Be able to identify opportunities for customer service improvement through the use of technology	<ul style="list-style-type: none">2.1 Review the effectiveness of customer service delivery against agreed criteria2.2 Identify how customer service delivery could be improved by the introduction or adaptation of technology2.3 Assess the costs of changes in the use of technology to improve customer service delivery2.4 Make recommendations for changes in the use of technology through a costed business case
3 Be able to implement changes in technology to improve customer service	<ul style="list-style-type: none">3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business3.2 Update colleagues on the implementation and expected benefits of new technology3.3 Provide staff with training in the use of new technology3.4 Monitor the implementation of changes in the use of technology in line with the plan3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria

Unit D/506/2962

Develop a social media strategy for customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the development of a customer service social media strategy	<ul style="list-style-type: none">1.1 Explain the role of social media within the organisation's customer service strategy1.2 Analyse the components and scope of a social media strategy and its links with other aspects of the organisation1.3 Explain the importance of marketing and brand values for the organisation's strategy1.4 Explain the functionality and features of external social media tools1.5 Analyse media management tools in relation to social networking1.6 Evaluate the way in which the organisation's use of social media contributes to business performance
2 Be able to develop a customer service social media strategy	<ul style="list-style-type: none">2.1 Evaluate the factors affecting the development of a customer service social media strategy2.2 Assess the suitability of different methods of engaging customers using social media2.3 Analyse competitor presence and activity in social media2.4 Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints2.5 Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks2.6 Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy
3 Be able to promote the benefits of social media networking to customer service	<ul style="list-style-type: none">3.1 Evaluate the benefits and drawbacks of using social media for dissemination purposes3.2 Analyse the benefits and consequences of social media engagement with customers3.3 Promote on-going dialogue with customers through social networking3.4 Act as a social media "champion" within the organisation3.5 Analyse the risks attached to the use of social media

Unit H/506/2977

Support customers using self-service equipment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to support customers using self-service equipment	<ul style="list-style-type: none">1.1 Explain how the self-service equipment works1.2 Describe problems that are commonly encountered by customers when using self-service equipment1.3 Explain demonstration techniques to use when supporting customers using self-service equipment1.4 Explain organisational procedures for the use of equipment and fault reporting
2 Be able to identify the help needed by customers using self-service equipment	<ul style="list-style-type: none">2.1 Identify signs that show when a customer is having difficulty with the self-service equipment2.2 Identify a style and level of intervention that meets customers' needs
3 Be able to help customers to use self-service equipment	<ul style="list-style-type: none">3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment3.2 Use staff override functions to enable self-service equipment to be used by customers3.3 Explain to customers how to use the equipment and complete the transaction3.4 Report equipment-related errors and issues to the right person

Unit K/506/2978

Provide post-transaction customer service

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand post-transaction customer service	<ul style="list-style-type: none">1.1 Explain organisational policies and procedures for post-transaction customer service1.2 Explain the purposes and range of post-transaction activities1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service1.4 Explain how legislation and regulation affect customers' rights1.5 Explain the advantages and disadvantages of post-transaction customer service programmes
2 Be able to provide post-transaction customer service	<ul style="list-style-type: none">2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines2.2 Use unplanned opportunities post-transaction to provide customer service2.3 Identify reasons for contacting customers post-transaction2.4 Confirm customers' levels of satisfaction post-transaction2.5 Make recommendations to decision makers to enhance customer satisfaction2.6 Present a professional and helpful image

Unit H/506/1912

Negotiate in a business environment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations
2 Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party 2.6 Research the strengths and weaknesses of the other party
3 Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances 3.3 Maintain accurate records of negotiations, outcomes and agreements made 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Unit T/506/1820

Promote equality, diversity and inclusion in the workplace

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the organisational aspects of equality, diversity and inclusion in the workplace	<ul style="list-style-type: none">1.1 Explain the difference between equality, diversity and inclusion1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy1.3 Explain the potential consequences of breaches of equality legislation1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion
2 Understand the personal aspects of equality, diversity and inclusion in the workplace	<ul style="list-style-type: none">2.1 Explain the different forms of discrimination and harassment2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
3 Be able to support equality, diversity and inclusion in the workplace	<ul style="list-style-type: none">3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

Unit A/506/1821

Manage team performance

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance 1.2 Explain a range of quality management techniques to manage team performance 1.3 Describe constraints on the ability to amend priorities and plans
2 Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members 2.2 Allocate work on the basis of the strengths, competences and expertise of team members 2.3 Identify areas for improvement in team members' performance outputs and standards 2.4 Amend priorities and plans to take account of changing circumstances 2.5 Recommend changes to systems and processes to improve the quality of work
3 Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels 3.2 Communicate individual and team objectives, responsibilities and priorities 3.3 Use communication methods that are appropriate to the topics, audience and timescales 3.4 Provide support to team members when they need it 3.5 Agree with team members a process for providing feedback on work progress and any issues arising 3.6 Review the effectiveness of team communications and make improvements

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance 1.2 Explain how to identify causes of underperformance 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively 1.4 Explain how to address issues that hamper individuals' performance 1.5 Explain how to agree a course of action to address underperformance
2 Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs 2.3 Apply motivation techniques to maintain morale 2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards 2.5 Monitor individuals' progress towards objectives in accordance with agreed plans 2.6 Recognise individuals' achievement of targets and quality standards 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace

Unit M/506/1931

Collaborate with other departments

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to collaborate with other departments	1.1 Explain the need for collaborating with other departments 1.2 Explain the nature of the interaction between their own team and other departments 1.3 Explain the features of effective collaboration 1.4 Explain the potential implications of ineffective collaboration with other departments 1.5 Explain the factors relating to knowledge management that should be considered when collaborating with other departments
2 Be able to identify opportunities for collaboration with other departments	2.1 Analyse the advantages and disadvantages of collaborating with other departments 2.2 Identify with which departments collaborative relationships should be built 2.3 Identify the scope for and limitations of possible collaboration
3 Be able to collaborate with other departments	3.1 Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements 3.2 Work with other departments in a way that contributes to the achievement of organisational objectives

Unit F/502/8612

Negotiating, handling objections and closing sales

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to handle objections and negotiate with the customer	<ul style="list-style-type: none">1.1 Describe the scope of authority and responsibility when dealing with objections1.2 Identify the resources available to counter the sales objections1.3 Describe how to plan and prepare for negotiation1.4 Describe how to use testimonials to progress a sale1.5 Explain the advantages and disadvantages of different methods of closing a sale1.6 Explain organisational procedures for documenting the negotiated sale
2 Be able to prepare for objections and negotiation with the customer	<ul style="list-style-type: none">2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer2.2 Confirm authorisation to negotiate2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome
3 Be able to handle objections	<ul style="list-style-type: none">3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques3.2 Identify and prioritise customers' concerns3.3 Provide evidence to the customer of the strengths of the organisation's products or services3.4 Confirm with the customer that the objection(s) have been overcome3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals
4 Be able to negotiate with the customer	<ul style="list-style-type: none">4.1 Carry out negotiations according to negotiation plan4.2 Promote the benefits of what is being offered to the customer4.3 Explain to the customer when and why no further adjustment is possible4.4 Obtain support to progress negotiation that is outside own level of authority
5 Be able to close the sale following negotiation	<ul style="list-style-type: none">5.1 Apply a trial close in accordance with the negotiation plan5.2 Respond to any further objections and concerns5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities5.4 Summarise agreements made in accordance with organisational procedures and close the sale

Unit R/502/8615

Obtaining and analysing sales-related information

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the uses of sales-related information	1.1 Explain the importance of up-to-date information for sales planning purposes 1.2 Explain the benefits and risks of using a range of information sources to support sales activities 1.3 Explain the limitations of sales-related information 1.4 Explain the importance of reviewing sales data requirements for current and future use
2 Understand how to use tools and methods to analyse sales-related information	2.1 Explain the advantages and disadvantages of different systems to gather sales-related information 2.2 Explain how to use different software packages for analysing and presenting sales-related information
3 Be able to obtain sales-related information about customers, markets and competitors	3.1 Specify the information needed to develop an understanding of customers, competitors and markets 3.2 Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors 3.3 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation
4 Be able to use tools and methods to analyse sales-related information	4.1 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information 4.2 Define the information needs of the target audience for different types of sales-related information 4.3 Use the analytical protocols that are appropriate to the selected tools and methods 4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information 4.5 Validate the reliability and validity of the findings of the analysis 4.6 Provide sales-related information to the target audience within the agreed timescale and budget

Unit K/502/8622

Buyer behaviour in sales situations

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the impact of different models of buyer behaviour on the sales cycle	1.1 Explain the consumer buying decision-making process 1.2 Explain how the consumer buying decision-making process affects the sales cycle 1.3 Describe the influences that affect the consumer decision-making process 1.4 Explain the organisational buying decision-making process 1.5 Explain how the organisational buying decision-making process affects the sales cycle 1.6 Describe the influences that affect the organisational buying decision-making process 1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle
2 Be able to respond to the buyer at each stage of the decision making process	2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process 2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role 2.3 Use objections as buying opportunities 2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

Unit K/503/0418

Manage incidents referred to a contact centre

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to manage incidents through a contact centre	1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures 1.2 Select resources that are available to deal with reported incidents 1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures 1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures 1.5 Monitor the management of the incident in accordance with organisational procedures 1.6 Ensure that the correct decision paths have been followed to manage reported incidents 1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures
2 Be able to provide support to colleagues on incident management in a contact centre	2.1 Agree with colleagues the areas in which they need support and guidance in incident management 2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs 2.3 identify actions to improve team performance in incident handling from a review of incident management results
3 Understand how to manage incidents reported to a contact centre	3.1 Explain the incident management services offered by the contact centre 3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident 3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents 3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident 3.5 Describe the strengths and weaknesses of different types of support for colleagues 3.6 Explain the importance of reviewing incident management results

Unit D/503/0397

Lead direct sales activities in a contact centre team

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to carry out sales activities in a contact centre	<ul style="list-style-type: none">1.1 Prepare for a direct sales activity in accordance with organisational procedures1.2 Establish customer wishes and needs1.3 Offer options to customers by linking their wishes and needs to products and/or services1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour1.5 Close the sale by agreement with the customer during the customer contact1.6 Record the confirmed order in accordance with organisational procedures1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre1.8 Complete the authorisation or payment in accordance with organisational procedures
2 Be able to analyse contact centre sales data	<ul style="list-style-type: none">2.1 Collate sales data from direct sales activities in a format that enables data manipulation2.2 Analyse sales performance against market and customer trends2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan
3 Be able to lead a team involved in direct sales activities in a contact centre	<ul style="list-style-type: none">3.1 Identify sales activities which are capable of fulfilling the sales plan3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling3.3 Monitor the team's sales performance against agreed targets3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach3.5 Provide encouragement and guidance to team colleagues during sales activities
4 Understand sales activities in a contact centre team	<ul style="list-style-type: none">4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre4.2 Explain the organisational and regulatory requirements of direct sales activities4.3 Explain the techniques for overcoming objections and questions from customers during sales activities4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
	4.5 Explain the importance of setting a good example in a contact centre team 4.6 Explain how to set sales targets including cross-selling and up-selling

Unit L/506/1807

Manage diary systems

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the management of diary systems	<ul style="list-style-type: none">1.1 Explain the importance of keeping diary systems up to date1.2 Describe the basis on which bookings and changes are prioritised1.3 Explain any constraints relating to making bookings for people or facilities1.4 Describe the types of problems that can occur when managing diaries
2 Be able to manage diary systems	<ul style="list-style-type: none">2.1 Obtain the information needed to make diary entries2.2 Make accurate and timely diary entries2.3 Respond to changes in a way that balances and meets the needs of those involved2.4 Communicate up-to-date information to everyone involved2.5 Keep diaries up-to-date2.6 Maintain the requirements of confidentiality

Unit H/506/1814

Provide reception services

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand reception services	1.1 Explain the receptionist's role in representing an organisation 1.2 Explain an organisation's structure and lines of communication 1.3 Describe an organisation's standards of presentation 1.4 Explain the health, safety and security implications of visitors to a building 1.5 Explain how to deal with challenging people
2 Be able to provide a reception service	2.1 Welcome visitors in accordance with organisational standards 2.2 Direct visitors to the person they are visiting in accordance with organisational standards 2.3 Record visitors' arrivals and departures in accordance with organisational procedures 2.4 Provide advice and accurate information within organisational guidelines on confidentiality 2.5 Keep the reception area tidy and materials up-to-date 2.6 Answer and deal with telephone calls within organisational standards 2.7 Adhere to organisational procedures on entry, security, health and safety

Unit L/506/1869

Contribute to the organisation of an event

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand event organisation	<ul style="list-style-type: none">1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event1.2 Explain the purpose and features of different types of events1.3 Describe the type of resources needed for different types of events1.4 Describe the different needs attendees may have and how to meet these1.5 Explain the requirements of health, safety and security when organising events1.6 Describe the types of problems that may occur during events and how to deal with them
2 Be able to carry out pre-event actions	<ul style="list-style-type: none">2.1 Identify venue requirements for an event2.2 Obtain resources within the agreed timescales2.3 Distribute pre-event documentation to delegates in accordance with the event plan2.4 Co-ordinate attendee responses within the agreed timescale2.5 Identify any special requirements of event attendees
3 Be able to set up an event	<ul style="list-style-type: none">3.1 Set up layout and resources in accordance with the event plan3.2 Confirm that all identified resources are in place and meet requirements3.3 Behave in a way that maintains organisational values and standards
4 Be able to carry out post-event actions	<ul style="list-style-type: none">4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event

Unit M/506/1895

Buddy a colleague to develop their skills

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to buddy a colleague	1.1 Describe what is expected of a buddy 1.2 Explain techniques to give positive feedback and constructive criticism 1.3 Explain techniques to establish rapport with a buddy
2 Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3 Agree a schedule of meetings that minimise disruption to business 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3 Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities 3.2 Provide examples of how to carry out tasks correctly 3.3 Identify instances of good practice and areas for improvement through observation 3.4 Praise a buddy colleague on well completed tasks 3.5 Give constructive feedback on ways in which a buddy could improve performance 3.6 Offer a buddy hints and tips based on personal experience

Unit L/506/1905

Employee rights and responsibilities

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry 1.2 Describe career pathways within their organisation and industry 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway 1.4 Describe an organisation's principles of conduct and codes of practice 1.5 Explain issues of public concern that affect an organisation and industry 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2 Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour 2.3 Describe the procedures and documentation that protect relationships with employees 2.4 Identify sources of information and advice on employment rights and responsibilities

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 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 F/502/4397 Bespoke Software

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3 Respond appropriately to data entry error messages
2 Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively 2.2 Select and use appropriate structures and/or layouts to organise information 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
3 Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Select and use appropriate methods to present information



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