Customer Service

Level 3 QCF units

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Title	Organise and deliver customer service
Skills CFA Reference	CS 25
Level	3
Credit Value	5
GLH	27
Unit Reference No.	L/506/2150

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand how to organise customer service delivery	1.1 Explain how different methods of promoting products and/or services impact on customer service delivery 1.2 Explain who should be involved in the organisation of customer service delivery 1.3 Explain the importance of differentiating between customers' wants, needs and expectations 1.4 Explain different ways of segmenting customer groups 1.5 Explain how customer segmentation is used in organising customer service delivery 1.6 Explain how to analyse the "customer journey"
2. Be able to plan the delivery of customer service	2.1 Identify customers' needs and expectations 2.2 Map the "customer journey" 2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service 2.4 Prepare the resources needed to deliver products and/or services to different types of customers 2.5 Plan how to deal with unexpected additional workloads 2.6 Allocate priorities to address points of service failure
3. Be able to deliver customer service	3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives 3.2 Agree realistic and achievable actions with customers 3.3 Identify areas for improvement in their

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	own customer service delivery 3.4 Adapt their own customer service delivery to meet customers' changing expectations

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSB2 Deliver reliable customer service reliable customer service • CFACSB10 Organise the delivery of
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Understand the customer service environment
Skills CFA Reference	CS 26
Level	3
Credit Value	5
GLH	40
Unit Reference No.	Y/506/2152

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand the concepts and practices underpinning customer service delivery	1.1 Explain the value of customer service as a competitive tool 1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service 1.3 Describe techniques used to identify service failures 1.4 Explain the concept and importance of the service profit chain 1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to customers and to an organisation 2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services 2.3 Explain the potential impact of good and poor customer service on a brand
3. Understand the structure of customer service	3.1 Explain the features of different customer service models and customer service standards 3.2 Explain the relationship between customer service and operational areas of an organisation 3.3 Explain the relationship between customer service and continuous improvement processes 3.4 Explain the costs and benefits of customer service to an organisation 3.5 Explain the impact of organisational values on how customers create their expectations 3.6 Explain how organisational values

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	impact on meeting customer expectations
4. Understand the implications of legislation on customer service delivery	4.1 Explain the implications of consumer-related legislation on customer service delivery 4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA14 Use customer service as a competitive tool
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Understand customers and customer retention
Skills CFA Reference	CS 27
Level	3
Credit Value	4
GLH	35
Unit Reference No.	J/506/2910

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand Customer Relationship Management (CRM)	1.1 Explain the concept of the "customer experience" 1.2 Explain different methods of segmenting and characterising customers 1.3 Explain the purpose and scope of CRM 1.4 Describe the features of an effective CRM system 1.5 Explain the uses of CRM data in customer service delivery
2. Understand customer retention	2.1 Explain the term customer retention 2.2 Explain the benefits of customer retention to an organisation 2.3 Explain the factors that influence customer retention 2.4 Describe techniques used to attract and retain customers 2.5 Explain how to assess the extent of customer loyalty 2.6 Explain the factors involved in customer recovery
3. Understand the measurement of customer satisfaction	3.1 Describe techniques used to analyse performance data 3.2 Explain the factors to be taken into account in setting performance targets and objectives 3.3 Explain the features and uses of a range of techniques to measure customer satisfaction

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if	Customers Service (2013) National Occupational Standards: • CFACSB14 Review the quality of

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appropriate)	customer service • CFACSB15 Build and maintain effective customer relations
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Develop resources to support consistency of customer service delivery
Skills CFA Reference	CS 28
Level	3
Credit Value	5
GLH	21
Unit Reference No.	Y/506/2166

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand how knowledge resources are used to support customer service delivery	1.1 Explain the structure of a customer service knowledge base 1.2 Explain the uses of a customer service knowledge base 1.3 Explain the use of customers' frequently asked questions to support customer service delivery 1.4 Explain the input and update routines for adding to the knowledge base 1.5 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	2.1 Identify the information that should be included in a customer service knowledge base 2.2 Confirm that a knowledge base is kept up to date 2.3 Promote the contents and use of a knowledge base
3. Be able to develop customer service resource materials	3.1 Describe the types of questions frequently asked by customers 3.2 Identify the types of resources needed to support customer service delivery from an analysis of customer needs 3.3 Identify who will use the resources and in what way 3.4 Develop resources that meet organisational requirements 3.5 Communicate the availability and nature of the resources to those who will use them

Additional Information about the unit	
Unit expiry date	August 31 2014

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Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSA16 Build a customer service knowledge base
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Use service partnerships to deliver customer service
Skills CFA Reference	CS 29
Level	3
Credit Value	3
GLH	20
Unit Reference No.	D/506/2167

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand the use of a service partnership in customer service delivery	1.1 Explain the roles and responsibilities of the partners involved in a service chain 1.2 Explain the advantages and limitations of using a service partnership 1.3 Explain the use and value of formal and informal service level agreements
2. Understand ways of building relationships within a customer service partnership	2.1 Describe effective communication methods for dealing with service partners 2.2 Explain how to develop positive relationships with service partners 2.3 Describe negotiating techniques for dealing with service partners 2.4 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	3.1 Identify the levels of authority that exist within a service partnership 3.2 Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery 3.3 Establish service procedures that are acceptable to all members of a service partnership 3.4 Agree with service partners priorities and resolutions relating to conflicts of interest 3.5 Identify areas for improvement from the analysis of a range of sources of information

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit	Customers Service (2013) National

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and relevant national occupational standards or other professional standards or curricula (if appropriate)	Occupational Standards: • CFACSB9 Deliver customer service using service partnerships
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Resolve customers' problems
Skills CFA Reference	CS 30
Level	3
Credit Value	4
GLH	19
Unit Reference No.	K/506/2169

Learning Outcomes	**Assessment Criteria**
The learner will:	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

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	customers' problems

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSC5 Monitor and solve customer service problems
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Resolve customers' complaints
Skills CFA Reference	CS 31
Level	3
Credit Value	4
GLH	22
Unit Reference No.	R/506/2151

Learning Outcomes	**Assessment Criteria**
The learner will:	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

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	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

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSC7 Process customer service complaints • CFACSC8 Handle referred customer complaints
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Gather, analyse and interpret customer feedback
Skills CFA Reference	CS 32
Level	3
Credit Value	5
GLH	24
Unit Reference No.	D/506/2170

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand how to gather, analyse and interpret customer feedback	1.1 Describe methods of collecting data for customer research 1.2 Explain random sampling techniques used to collect data 1.3 Explain how to evaluate bias in non-random samples 1.4 Explain the principles of questionnaire design 1.5 Assess the suitability of a range of techniques to analyse customer feedback 1.6 Explain techniques used to monitor the quality of data collected 1.7 Explain the use of software to record and analyse customer feedback 1.8 Explain the validation issues associated with customer feedback 1.9 Explain the importance of anonymising comments from customers who do not wish to be identified
2. Be able to plan the collection of customer feedback on customer service issues	2.1 Identify the objectives of collecting customer feedback 2.2 Justify the reasons for selecting different data collection methods 2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
3. Be able to gather customer feedback	3.1 Collect customer feedback using the sampling frame identified in a customer service plan 3.2 Record data in a way that makes analysis straightforward 3.3 Verify that all data is handled in line with legal, organisational and ethical

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	policies and procedures
4. Be able to analyse and interpret customer feedback to recommend improvements	4.1 Use data analysis methods to identify patterns and trends in customer feedback 4.2 Use the findings of a data analysis to identify areas for improvement to customer service 4.3 Present the findings of an analysis in the agreed format 4.4 Recommend improvements in response to the findings of an analysis

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSD12 Gather, analyse and interpret customer feedback
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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Title	Monitor the quality of customer service interactions
Skills CFA Reference	CS 33
Level	3
Credit Value	5
GLH	27
Unit Reference No.	K/506/2172

Learning Outcomes	**Assessment Criteria**
The learner will:	The learner can:
1. Understand how to monitor the quality of customer service interactions	1.1 Describe techniques for monitoring the quality of customer service interactions 1.2 Explain organisational procedures and guidelines for customer service delivery 1.3 Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions 1.4 Explain how to construct a representative sample of customer service interactions for monitoring purposes 1.5 Explain how data protection legislation applies to monitoring the quality of customer service interactions 1.6 Explain how monitoring actions taken can identify possible improvements in customer service interactions 1.7 Explain techniques to gather customer feedback
2. Be able to prepare to monitor the quality of customer service interactions	2.1 Identify the criteria against which the quality of customer service interactions will be monitored 2.2 Specify a sampling frame that would provide information to meet monitoring objectives 2.3 Select monitoring techniques that are capable of collecting the required information 2.4 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	3.1 Monitor the quality of customer service interactions with minimal disruption to business 3.2 Assess the quality of customer service

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	interactions against agreed criteria 3.3 Identify patterns and trends in colleagues' performance 3.4 Give constructive feedback to colleagues on the quality of customer service interactions

Additional Information about the unit	
Unit expiry date	August 31 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: • CFACSD13 Monitor the quality of customer service transactions
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	August 31 2014

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