



Learner
Achievement
Portfolio

Level 3 Diploma in Customer Service – Group A

Qualification
Accreditation Number:
601/3545/1
Version AIQ004422

Active iQ

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.

Active IQ Level 3 Diploma in Customer Service

Qualification Accreditation Number 601/3545/1

Personal details

Learner's name:

Workplace:

Workplace address:

Workplace telephone number:

Assessor's name:

Assessor's telephone number:

Assessor's email:

Introduction

Welcome to the **Active IQ Level 3 Diploma in Customer Service**

This document is designed to assist you in gathering evidence to prove your competence against the standards in each of your chosen units. Your work-based Assessor will provide you with guidance and support and help you decide on the best types of evidence to produce to prove competence.

When you start the qualification, your work-based assessor will usually help you to:

- Identify what you can do already
- Agree on the standard and level you are aiming for
- Analyse what you need to learn
- Choose and agree on activities that allow you to learn what you need

Assessment is normally through on-the-job observation and questioning. You will produce evidence to prove you have the competence to meet the qualification's standards. Your assessor will sign off units when they believe you are ready. The assessor will test your knowledge, understanding and work-based performance to make sure you can demonstrate competence in the workplace.

When planning assessments assessors will use a range of methods appropriate to you and required by the awarding body to assess you against the standards. The various methods of assessment that can be used are:

- Direct observation of you in the workplace
- Professional discussion
- Questioning
- Examination of workplace products you have produced
- Witness testimony
- Simulation (where allowed)
- DVD / Audio

Your assessor will explain all of these different methods to you.

You will compare your performance with the standards as you learn. You will look at what you have achieved, how much you still need to do and how you should go about it until you are assessed as competent for a unit. The qualification is suited to those who already have skills and want to develop them.

Active IQ Level 3 Diploma in Customer Service

Qualification Structure

This qualification consists of six mandatory units and 39 optional units.

You must complete a minimum of 55 credits.

You must achieve all 6 units (31 credits) from mandatory Group A and a minimum of 15 credits from optional Group B. A maximum of 9 credits can come from optional Group C.

A minimum of 40 credits must be achieved at level 3 or above.

Unit		Accreditation number	Level	Credit
Mandatory units (Group A)				
Successful achievement of all six mandatory units must be achieved for the full qualification.				
1.	Organise and deliver customer service	L/506/2150	3	5
2.	Understand the customer service environment	Y/506/2152	3	5
3.	Resolve customers' problems	K/506/2169	3	4
4.	Principles of business	D/506/1942	3	10
5.	Manage personal and professional development	T/506/2952	3	3
6.	Understand customers and customer retention	J/506/2910	3	4
Optional units (Group B)				
You must achieve a minimum of 15 credits from group B				
7.	Develop resources to support consistency of customer service delivery	Y/506/2166	3	5
8.	Use service partnerships to deliver customer service	D/506/2167	3	3
9.	Resolve customers' complaints	R/506/2151	3	4
10.	Gather, analyse and interpret customer feedback	D/506/2170	3	5
11.	Monitor the quality of customer service interactions	K/506/2172	3	5
12.	Communicate verbally with customers	D/506/2119	2	3
13.	Communicate with customers in writing	T/506/2126	2	3
14.	Promote additional products and/or services to customers	L/506/2133	2	2
15.	Exceed customer expectations	Y/506/2135	2	3
16.	Deliver customer service whilst working on customers' premises	T/506/2143	2	4
17.	Deliver customer service to challenging customers	F/506/2159	2	3
18.	Develop customer relationships	Y/506/2149	2	3
19.	Support customer service improvements	T/506/2160	2	3
20.	Support customers through real-time online customer service	A/506/2161	2	3

21.	Use social media to deliver customer service	J/506/2163	2	3
22.	Champion customer service	D/506/2153	4	4
23.	Build and maintain effective customer relations	R/506/2179	4	6
24.	Manage a customer service award programme	L/506/2181	4	4
25.	Manage the use of technology to improve customer service	Y/506/2183	4	4
26.	Develop a social media strategy for customer service	D/506/2962	4	5
27	Support customers using self-service equipment	H/506/2977	2	3
28	Provide post-transaction customer service	K/506/2978	2	5
Optional units (Group C)				
You may achieve a maximum of 9 credits from group C				
29.	Negotiate in a business environment	H/506/1912	3	4
30	Promote equality, diversity and inclusion in the workplace	T/506/1820	3	3
31	Manage team performance	A/506/1821	3	4
32	Manage individuals' performance	J/506/1921	3	4
33	Collaborate with other departments	M/506/1931	3	3
34	Negotiating, handling objections and closing sales	F/502/8612	3	4
35	Obtaining and analysing sales-related information	R/502/8615	3	4
36	Buyer behaviour in sales situations	K/502/8622	3	3
37	Manage incidents referred to a contact centre	K/503/0418	3	6
38	Lead direct sales activities in a contact centre team	D/503/0397	3	4
39	Manage diary systems	L/506/1807	2	2
40	Contribute to the organisation of an event	L/506/1869	2	3
41	Provide reception services	H/506/1814	2	3
42	Buddy a colleague to develop their skills	M/506/1895	2	3
43	Employee rights and responsibilities	L/506/1905	2	2
44	Processing sales orders	M/502/8587	2	2
45	Bespoke software	J/502/4397	3	4

Witness/Assessor Status List

Please ensure anybody who has made an assessment decision or provided a witness testimony within your portfolio has completed the witness/ assessor list

Witness name and address	Status of Witness (See key below)	Relationship to learner	Signature

Witness Status Key:

1. Qualified Assessor, occupationally competent and familiar with standards
2. Qualified Assessor, not occupationally competent or familiar with standards
3. Occupationally competent, not an assessor (eg line manager)
4. Not occupationally competent, familiar with learner (eg customer)

Record of Achievement

Unit name	Date Completed	Assessor Signature	IV Signature (if sampled)	Date	EV Signature (if sampled)	Date
Mandatory						

Optional Units Group B

Optional Units Group C

Master Evidence Index

Evidence Number	Description
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	
21.	
22.	
23.	

Mandatory Group A

Unit 1

Title	Organise and deliver customer service		
Level	3		
Credit	5		
Unit accreditation no.	L/506/2150		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
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 own customer service delivery			
	3.4 Adapt their own customer service delivery to meet customers' changing expectations			
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 2

Title	Understand the customer service environment		
Level	3		
Credit	5		
Unit accreditation no.	Y/506/2152		
Learning Outcomes The learner will:	▶	Initial	Evidence Reference
1. Understand the concepts and practices underpinning customer service delivery	1.1 Explain the value of customer service as a competitive tool		WORKSHEET
	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		

		WORKSHEET	
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 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		
Evidence Requirements This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 3

Resolve customers' problems				
3				
4				
K/506/2169				
Assessment Criteria		Initial Evidence Reference		
The learner will:		Initial Evidence Reference		
The learner can:		Initial Evidence Reference		
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			
	2.1 Confirm the nature and cause of customers' problems			
2. Be able to deal with 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			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 4

Title	Principles of business		
Level	3		
Credit	10		
Unit accreditation no.	D/506/1942		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand business markets	1.1 Explain the characteristics of different business markets		WORKSHEET
	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		
	2.1 Define business innovation		
2. Understand business innovation and growth	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		

		WORKSHEET	
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		
Evidence Requirements			
This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 5

Title	Manage personal and professional development		
Level	3		
Credit	3		
Unit accreditation no.	T/506/2952		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity 1.2 Identify trends and developments that influence the need for professional development 1.3 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	2.1 Evaluate the benefits of personal and professional development 2.2 Explain the basis on which types of development actions are selected 2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis 2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives 2.5 Execute the plan within the agreed budget and timescale 2.6 Take advantage of development opportunities made available by professional networks or professional bodies		

<p>3. Be able to maintain the relevance of a personal and professional development plan</p>	<p>3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives</p>				
	<p>3.2 Obtain feedback on performance from a range of valid sources</p>				
	<p>3.3 Review progress toward personal and professional objectives</p>				
	<p>3.4 Amend the personal and professional development plan in the light of feedback received from others</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 6

Title	Understand customers and customer retention		
Level	3		
Credit	4		
Unit accreditation no.	J/506/2910		
Learning Outcomes The learner will:	▶	Initial	Evidence Reference
1. Understand Customer Relationship Management (CRM)	1.1 Explain the concept of the “customer experience”		WORKSHEET
	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		
	2.1 Explain the term customer retention		
2. Understand 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			WORKSHEET
	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			
	Evidence Requirements This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Active IQ

Westminster House
The Anderson Centre
Ermine Business Park
Huntingdon PE29 6XY

T 01480 467 950
F 01480 456 283
info@activeiq.co.uk
www.activeiq.co.uk

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.

Active iQ





Learner
Achievement
Portfolio

Level 3 Diploma in Customer Service – Group B

Qualification
Accreditation Number:
601/3545/1
Version AIQ004423

Active iQ

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.

Optional Group B

Unit 7

Title	Develop resources to support consistency of customer service delivery		
Level	3		
Credit	5		
Unit accreditation 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			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 8

Title	Use service partnerships to deliver customer service		
Level	3		
Credit	3		
Unit accreditation no.	D/506/2167		
Learning Outcomes The learner will:	↘	Initial	Evidence Reference
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	
	2.1	Describe effective communication methods for dealing with service partners	
2. Understand ways of building relationships within a customer service partnership	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	

<p>3. Be able to deliver customer service within a customer service partnership</p>	<p>3.1 Identify the levels of authority that exist within a service partnership</p> <p>3.2 Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery</p> <p>3.3 Establish service procedures that are acceptable to all members of a service partnership</p> <p>3.4 Agree with service partners priorities and resolutions relating to conflicts of interest</p> <p>3.5 Identify areas for improvement from the analysis of a range of sources of information</p>						
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed for this unit except as detailed below. Simulation may be used for assessment criteria 3.4 if no naturally occurring evidence is available.</p>							
<p>Supplementary evidence Supplementary evidence such as questioning may be used for assessment criteria 3.4 if no naturally occurring evidence is available.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 9

Title		Resolve customers' complaints			
Level		3			
Credit		4			
Unit accreditation no.		R/506/2151			
Learning Outcomes The learner will:		Assessment Criteria The learner can:			
1. Understand the monitoring and resolution of customers' complaints		Initial			
		Evidence Reference			
		▼			
		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					

<p>2. Be able to deal with customers' complaints</p>	<p>2.1 Confirm the nature, cause and implications of customers' complaints</p> <p>2.2 Take personal responsibility for dealing with complaints</p> <p>2.3 Communicate in a way that recognises customers' problems and understands their points of view</p> <p>2.4 Explain the advantages and limitations of different complaint response options to customers</p> <p>2.5 Explain the advantages and limitations of different complaint response options to the organisation</p> <p>2.6 Keep customers informed of progress</p> <p>2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority</p> <p>2.8 Record the outcome of the handling of complaints for future reference</p> <p>2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints</p>		
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>			
<p>Simulation Simulation is not allowed.</p>			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 10

Title	Gather, analyse and interpret customer feedback		
Level	3		
Credit	5		
Unit accreditation no.	D/506/2170		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
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	<p>2.1 Identify the objectives of collecting customer feedback</p> <p>2.2 Justify the reasons for selecting different data collection methods</p> <p>2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe</p>			
3. Be able to gather customer feedback	<p>3.1 Collect customer feedback using the sampling frame identified in a customer service plan</p> <p>3.2 Record data in a way that makes analysis straightforward</p> <p>3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures</p>			
4. Be able to analyse and interpret customer feedback to recommend improvements	<p>4.1 Use data analysis methods to identify patterns and trends in customer feedback</p> <p>4.2 Use the findings of a data analysis to identify areas for improvement to customer service</p> <p>4.3 Present the findings of an analysis in the agreed format</p> <p>4.4 Recommend improvements in response to the findings of an analysis</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 11

Title	Monitor the quality of customer service interactions		
Level	3		
Credit	5		
Unit accreditation no.	K/506/2172		
Learning Outcomes The learner will:	✓	Assessment Criteria The learner can:	Initial Evidence Reference
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	

<p>2. Be able to prepare to monitor the quality of customer service interactions</p>	<p>2.1 Identify the criteria against which the quality of customer service interactions will be monitored</p> <p>2.2 Specify a sampling frame that would provide information to meet monitoring objectives</p> <p>2.3 Select monitoring techniques that are capable of collecting the required information</p> <p>2.4 Ensure that staff and customers are made aware of the fact that they will be monitored</p>	<p>3. Be able to monitor the quality of customer service interactions</p>	<p>3.1 Monitor the quality of customer service interactions with minimal disruption to business</p> <p>3.2 Assess the quality of customer service interactions against agreed criteria</p> <p>3.3 Identify patterns and trends in colleagues' performance</p> <p>3.4 Give constructive feedback to colleagues on the quality of customer service interactions</p>	<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>	
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 12

Title	Communicate verbally with customers		
Level	2		
Credit	3		
Unit accreditation no.	D/506/2119		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
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			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 13

Title	Communicate with customers in writing			
Level	2			
Credit	3			
Unit accreditation no.	T/506/2126			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference	
1. Understand how to communicate with customers in writing	<p>1.1 Explain why it is necessary to use different forms of written communication for different purposes</p> <p>1.2 Describe practices for producing different forms of written communications</p> <p>1.3 Describe the potential benefits and limitations associated with communicating with customers in writing</p> <p>1.4 Explain the implications of confidentiality and data protection in communicating with customers in writing</p>			
2. Be able to plan written communications to customers	<p>2.1 Identify the objective(s) of the communication</p> <p>2.2 Gather the information needed to draft the communication</p> <p>2.3 Select the form of written communication that is most likely to lead to customer satisfaction within the service offer</p>			
3. Be able to communicate with customers in writing	<p>3.1 Produce communications that recognise customers' points of view in accordance with organisational standards, styles and tone</p> <p>3.2 Use language that is clear and concise, adapting it to meet identified customer needs</p> <p>3.3 Record decisions and actions taken and the reasons for them</p> <p>3.4 Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing</p>			

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 14

Title	Promote additional products and/or services to customers			
Level	2			
Credit	2			
Unit accreditation no.	L/506/2133			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference	
1. Understand the promotion of additional products and/or services to customers	1.1 Describe organisational policies and procedures on the promotion of additional products and/or services			
	1.2 Explain the importance of keeping product/service knowledge up to date			
	1.3 Explain how to match products and/or services to customer needs			
	1.4 Describe techniques to promote additional products and/or services			
	2. Be able to promote additional products and/or services to customers	2.1 Identify opportunities to promote additional products and/or services that are likely to improve the customer experience		
		2.2 Promote the benefits of additional products and/or services that are likely to be of interest to customers		
		2.3 Provide information to customers that will help them to decide whether to select additional products and/or services		
		2.4 Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services		
Evidence Requirements	Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation	Simulation is not allowed.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 15

Title		Exceed customer expectations		
Level		2		
Credit		3		
Unit accreditation no.		Y/506/2135		
Learning Outcomes		Assessment Criteria		
The learner will:		The learner can:		
		Initial Evidence Reference		
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		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 16

Title	Deliver customer service whilst working on customers' premises		
Level	2		
Credit	4		
Unit accreditation no.	T/506/2143		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to deliver customer service whilst working on customers' premises	1.1 Describe the preparations that need to be made prior to a visit		
	1.2 Explain the importance of being positive about the product and/or service		
	1.3 Explain organisational standards of presentation, behaviour and communication		
	1.4 Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed		
	1.5 Explain how to identify possible risks relating to the work to be carried out		
	1.6 Explain the way in which legislation affects the work to be carried out		

<p>2. Be able to deliver customer service whilst working on customers' premises</p>	<p>2.1 Identify themselves to customers</p> <p>2.2 Take action to ensure that customers know when, why and for how long work will be carried out on their premises</p> <p>2.3 Confirm with customers the nature of work to be carried out on their premises</p> <p>2.4 Keep customers informed of progress, delays, variations to work to be carried out and follow up needed</p> <p>2.5 Treat customers, their premises and property with consideration</p> <p>2.6 Confirm that the customer is satisfied with the outcome</p> <p>2.7 Maintain their own personal safety and security and that of customers whilst on customers' premises</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed for this unit except as detailed below. Simulation may be used for assessment criteria 2.4 (delays, variations) if no naturally occurring evidence is available.</p>				
<p>Supplementary evidence Supplementary evidence such as questioning may be used for assessment criteria 2.4 (delays, variations) if no naturally occurring evidence is available.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 17

Title	Deliver customer service to challenging customers		
Level	2		
Credit	3		
Unit accreditation no.	F/506/2159		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the delivery of customer service to challenging customers	1.1 Describe different types of challenging customers in the customer service environment		
	1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers		
	1.3 Explain behaviours that make it challenging to deal with customers		
	1.4 Explain the difference between assertive and aggressive behaviour		
	1.5 Describe techniques to deal with customers' challenging behaviour		
	1.6 Explain their own levels of authority for agreeing actions outside the service offer		
	1.7 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	2.1 Identify the signs that indicate that a customer is challenging			
	2.2 Express understanding of customers' point of view without admitting liability			
	2.3 Explain to customers the limits of the service they can offer			
	2.4 Explain to customers the reasons for an organisation's position and policy			
	2.5 Agree a way forward that balances customer satisfaction and organisational needs			
	2.6 Obtain help from colleagues when options for action are beyond their level of authority			
	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 18

Title	Develop customer relationships		
Level	2		
Credit	3		
Unit accreditation no.	Y/506/2149		
Learning Outcomes The learner will:	▼	Initial	Evidence Reference
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					
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.						
Simulation Simulation is not allowed.						

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 19

Title	Support customer service improvements			
Level	2			
Credit	3			
Unit accreditation no.	T/506/2160			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence	Reference
1. Understand how to support customer service improvements	<p>1.1 Describe different sources of information that may help identify ways of improving customer service</p> <p>1.2 Describe the constraints on suggesting improvements to customer service</p> <p>1.3 Explain the limits of their own authority in implementing improvements</p>			
2. Be able to identify the potential for improvements to customer service	<p>2.1 Use information from a range of sources to understand the customer experience</p> <p>2.2 Identify potential areas where customer service could be improved from an analysis of information</p> <p>2.3 Make recommendations for improvement that are based on evidence from analysed information</p>			
3. Be able to support the implementation of improvements to customer service	<p>3.1 Implement agreed improvements within the limits of their own authority</p> <p>3.2 Inform customers of improvements to customer service</p> <p>3.3 Identify the impact of improvements to customer service and feedback to relevant people</p>			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 20

Title	Support customers through real-time online customer service		
Level	2		
Credit	3		
Unit accreditation no.	A/506/2161		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to support customers through real-time online customer service	1.1 Explain how an organisation's online customer service system works		
	1.2 Explain how to navigate their own customer service site		
	1.3 Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services		
	1.4 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	2.1 Identify customers' familiarity with the site		
	2.2 Identify the difficulties faced by customers when navigating websites		
	2.3 Identify the support for customers that will meet their needs		
3. Be able to support online customer service in real-time	3.1 Step through screen sequences while the customer operates the system		
	3.2 Communicate with customers in terms they can understand		
	3.3 Inform customers of what is happening and why certain steps are required		
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 21

Title		Use social media to deliver customer service		
Level		2		
Credit		3		
Unit accreditation no.		J/506/2163		
Learning Outcomes The learner will:		▼	Initial	Evidence Reference
1. Understand social media in a business environment	1.1	Explain how different social media platforms can be used for customer service		
	1.2	Describe different audience groups for a range of social media platforms		
	1.3	Explain the importance of monitoring customer posts in social media networks		
	1.4	Explain organisational policy and guidelines for the use of social media for customer service purposes		
	1.5	Explain the etiquette of communication within different social media platforms		
	1.6	Explain the importance of security settings and how they are used on different social media platforms		
	1.7	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	2.1	Monitor social media to identify customer questions, requests and comments		
	2.2	Make responses that are appropriate to posts made by customers on social media networks		
	2.3	Take action to ensure that customers are satisfied before closing dialogue		
	2.4	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 22

Title	Champion customer service			
Level	4			
Credit	4			
Unit accreditation no.	D/506/2153			
Learning Outcomes	Assessment Criteria			
The learner will:	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		
			Initial	Evidence Reference

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			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 23

Title	Build and maintain effective customer relations		
Level	4		
Credit	6		
Unit accreditation no.	R/506/2179		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to build effective relationships with customers	1.1 Analyse stakeholder mapping techniques		
	1.2 Analyse the features of influencing techniques		
	1.3 Explain how influencing techniques can be used to improve the relationship with customers		
	1.4 Evaluate the benefits and value of relationships with customers and customer loyalty		
	1.5 Explain how techniques to manage expectations are applied to the management of customers		
	1.6 Explain different types of acceptable compromise		
	1.7 Evaluate the benefits of adopting a “customer-centred” approach		
2. Be able to determine the scope for building effective relationships with customers	2.1 Identify the customers with whom relationships should be developed		
	2.2 Identify the interests and concerns of customers with whom relationships should be developed		
	2.3 Evaluate the scope for and limitations of building relationships with different types of customer		

3. Be able to develop effective relationships with customers	3.1 Behave in a way that creates mutual trust and respect			
	3.2 Provide information and perform actions within agreed timescales			
	3.3 Take account of feedback provided by customers			
	3.4 Keep customers up to date with new products and/or services and developments			
	3.5 Assess regularly the extent to which customers' expectations are met			
	3.6 Use personal influence and authority to ensure that customer needs are met or exceeded			
	4. Be able to review and improve relationships with customers	4.1 Monitor customer relationships and developments		
4.2 Take action to ensure that others complete agreed actions within agreed timescales				
4.3 Address changes to customer service methods that may have an effect on customer relationships				
4.4 Collect feedback from customers on their levels of satisfaction				
4.5 Recommend improvements to customer service based on analyses of the effectiveness of customer relationships				
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


Assessor's signature:

Date:

IV's signature:

Date:

Unit 24

Title		Manage a customer service award programme		
Level		4		
Credit		4		
Unit accreditation no.		L/506/2181		
Learning Outcomes The learner will:		Assessment Criteria 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		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 25

Title	Manage the use of technology to improve customer service		
Level	4		
Credit	4		
Unit accreditation no.	Y/506/2183		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to manage the use of technology to improve customer service	1.1 Analyse developments in information and communication technology that relate to customer service		
	1.2 Analyse the features, functions and implications of technology for customer service delivery		
	1.3 Explain how to monitor the use of technology to improve customer service		
	2.1 Review the effectiveness of customer service delivery against agreed criteria		
2. Be able to identify opportunities for customer service improvement through the use of technology	2.2 Identify how customer service delivery could be improved by the introduction or adaptation of technology		
	2.3 Assess the costs of changes in the use of technology to improve customer service delivery		
	2.4 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	3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business			
	3.2 Update colleagues on the implementation and expected benefits of new technology			
	3.3 Provide staff with training in the use of new technology			
	3.4 Monitor the implementation of changes in the use of technology in line with the plan			
	3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria			
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 26

Title	Develop a social media strategy for customer service		
Level	4		
Credit	5		
Unit accreditation no.	D/506/2962		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the development of a customer service social media strategy	1.1 Explain the role of social media within the organisation's customer service strategy		
	1.2 Analyse the components and scope of a social media strategy and its links with other aspects of the organisation		
	1.3 Explain the importance of marketing and brand values for the organisation's strategy		
	1.4 Explain the functionality and features of external social media tools		
	1.5 Analyse media management tools in relation to social networking		
	1.6 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	<p>2.1 Evaluate the factors affecting the development of a customer service social media strategy</p> <p>2.2 Assess the suitability of different methods of engaging customers using social media</p> <p>2.3 Analyse competitor presence and activity in social media</p> <p>2.4 Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints</p> <p>2.5 Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks</p> <p>2.6 Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy</p>			
3. Be able to promote the benefits of social media networking to customer service	<p>3.1 Evaluate the benefits and drawbacks of using social media for dissemination purposes</p> <p>3.2 Analyse the benefits and consequences of social media engagement with customers</p> <p>3.3 Promote on-going dialogue with customers through social networking</p> <p>3.4 Act as a social media "champion" within the organisation</p> <p>3.5 Analyse the risks attached to the use of social media</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 27

Title	Support customers using self-service equipment		
Level	2		
Credit	3		
Unit accreditation no.	H/506/2977		
Learning Outcomes The learner will:	▼	Initial	Evidence Reference
1. Understand how to support customers using self-service equipment	1.1 Explain how the self-service equipment works		
	1.2 Describe problems that are commonly encountered by customers when using self-service equipment		
	1.3 Explain demonstration techniques to use when supporting customers using self-service equipment		
	1.4 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	2.1 Identify signs that show when a customer is having difficulty with the self-service equipment		
	2.2 Identify a style and level of intervention that meets customers' needs		
3. Be able to help customers to use self-service equipment	3.1 Maintain a professional, polite and approachable manner while monitoring customers' use of equipment		
	3.2 Use staff override functions to enable self-service equipment to be used by customers		
	3.3 Explain to customers how to use the equipment and complete the transaction		
	3.4 Report equipment-related errors and issues to the right person		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 28

Title	Provide post-transaction customer service		
Level	2		
Credit	5		
Unit accreditation no.	K/506/2978		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand post-transaction customer service	1.1 Explain organisational policies and procedures for post-transaction customer service		
	1.2 Explain the purposes and range of post-transaction activities		
	1.3 Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service		
	1.4 Explain how legislation and regulation affect customers' rights		
	1.5 Explain the advantages and disadvantages of post-transaction customer service programmes		
2. Be able to provide post-transaction customer service	2.1 Implement a programme of planned post-transaction interventions in line with organisational guidelines		
	2.2 Use unplanned opportunities post-transaction to provide customer service		
	2.3 Identify reasons for contacting customers post-transaction		
	2.4 Confirm customers' levels of satisfaction post-transaction		
	2.5 Make recommendations to decision makers to enhance customer satisfaction		
	2.6 Present a professional and helpful image		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

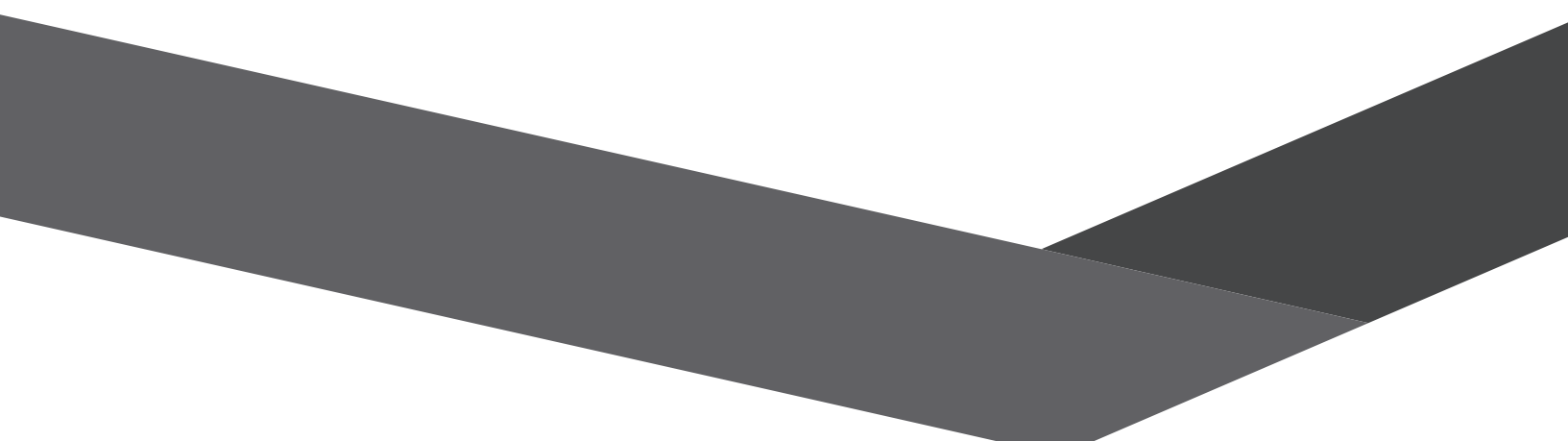
Date:

Active IQ

Westminster House
The Anderson Centre
Ermine Business Park
Huntingdon PE29 6XY

T 01480 467 950
F 01480 456 283
info@activeiq.co.uk
www.activeiq.co.uk

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.



Active iQ





Learner
Achievement
Portfolio

Level 3 Diploma in Customer Service – Group C

Qualification
Accreditation Number:
601/3545/1
Version AIQ004424

Active iQ

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.

Optional Group C

Unit 29

Title		Negotiate in a business environment		
Level		3		
Credit		4		
Unit accreditation no.		H/506/1912		
Learning Outcomes		Assessment Criteria		
The learner will:		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			
		▼	Initial	Evidence Reference

<p>3. Be able to carry out business negotiations</p>	<p>3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities</p>			
	<p>3.2 Adapt the conduct of the negotiation in accordance with changing circumstances</p>			
	<p>3.3 Maintain accurate records of negotiations, outcomes and agreements made</p>			
	<p>3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 30

Title		Promote equality, diversity and inclusion in the workplace		
Level		3		
Credit		3		
Unit accreditation no.		T/506/1820		
Learning Outcomes		Assessment Criteria		
The learner will:		The learner can:		
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1	Explain the difference between equality, diversity and inclusion		
	1.2	Explain the impact of equality, diversity and inclusion across aspects of organisational policy		
	1.3	Explain the potential consequences of breaches of equality legislation		
	1.4	Describe nominated responsibilities within an organisation for equality, diversity and inclusion		
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1	Explain the different forms of discrimination and harassment		
	2.2	Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace		
	2.3	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	3.1	Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace		
	3.2	Identify potential issues relating to equality, diversity and inclusion in the workplace		
	3.3	Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 31

Title		Manage team performance		
Level		3		
Credit		4		
Unit accreditation no.		A/506/1821		
Learning Outcomes The learner will:		▼	Initial	Evidence Reference
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			

<p>3. Be able to manage communications within a team</p>	<p>3.1 Explain to team members the lines of communication and authority levels</p>				
	<p>3.2 Communicate individual and team objectives, responsibilities and priorities</p>				
	<p>3.3 Use communication methods that are appropriate to the topics, audience and timescales</p>				
	<p>3.4 Provide support to team members when they need it</p>				
	<p>3.5 Agree with team members a process for providing feedback on work progress and any issues arising</p>				
	<p>3.6 Review the effectiveness of team communications and make improvements</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 32

Title		Manage individuals' performance		
Level		3		
Credit		4		
Unit accreditation no.		J/506/1921		
Learning Outcomes		Assessment Criteria		
The learner will:		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			
		Initial	Evidence Reference	

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 33

Collaborate with other departments				
Level		3		
Credit		3		
Unit accreditation no.		M/506/1931		
Learning Outcomes The learner will:		Assessment Criteria The learner can:	✓	Initial
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		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 34

Title	Negotiating, handling objections and closing sales		
Level	3		
Credit	4		
Unit accreditation no.	F/502/8612		
Learning Outcomes The learner will:	✓	Assessment Criteria The learner can:	Initial Evidence Reference
1. Understand how to handle objections and negotiate with the customer		1.1 Describe the scope of authority and responsibility when dealing with objections	
		1.2 Identify the resources available to counter the sales objections	
		1.3 Describe how to plan and prepare for negotiation	
		1.4 Describe how to use testimonials to progress a sale	
		1.5 Explain the advantages and disadvantages of different methods of closing a sale	
		1.6 Explain organisational procedures for documenting the negotiated sale	
2. Be able to prepare for objections and negotiation with the customer		2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer	
		2.2 Confirm authorisation to negotiate	
		2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome	

3. Be able to handle objections	3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques			
	3.2 Identify and prioritise customers' concerns			
	3.3 Provide evidence to the customer of the strengths of the organisation's products or services			
	3.4 Confirm with the customer that the objection(s) have been overcome			
	3.5 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	4.1 Carry out negotiations according to negotiation plan			
	4.2 Promote the benefits of what is being offered to the customer			
	4.3 Explain to the customer when and why no further adjustment is possible			
	4.4 Obtain support to progress negotiation that is outside own level of authority			
5. Be able to close the sale following negotiation	5.1 Apply a trial close in accordance with the negotiation plan			
	5.2 Respond to any further objections and concerns			
	5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities			
	5.4 Summarise agreements made in accordance with organisational procedures and close the sale			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 35

Title		Obtaining and analysing sales-related information		
Level		3		
Credit		4		
Unit accreditation no.		R/502/8615		
Learning Outcomes The learner will:		✓	Initial	Evidence Reference
<p>1. Understand the uses of sales-related information</p> <p>2. Understand how to use tools and methods to analyse sales-related information</p> <p>3. Be able to obtain sales-related information about customers, markets and competitors</p>	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			
	2.1 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			
	3.1 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			

<p>4. Be able to use tools and methods to analyse sales-related information</p>	<p>4.1 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information</p> <p>4.2 Define the information needs of the target audience for different types of sales-related information</p> <p>4.3 Use the analytical protocols that are appropriate to the selected tools and methods</p> <p>4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information</p> <p>4.5 Validate the reliability and validity of the findings of the analysis</p> <p>4.6 Provide sales-related information to the target audience within the agreed timescale and budget</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 36

Title	Buyer behaviour in sales situations		
Level	3		
Credit	3		
Unit accreditation no.	K/502/8622		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
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		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 37

Title	Manage incidents referred to a contact centre		
Level	3		
Credit	6		
Unit accreditation no.	K/503/0418		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to manage incidents through a contact centre	<p>1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures</p> <p>1.2 Select resources that are available to deal with reported incidents</p> <p>1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures</p> <p>1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures</p> <p>1.5 Monitor the management of the incident in accordance with organisational procedures</p> <p>1.6 Ensure that the correct decision paths have been followed to manage reported incidents</p> <p>1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures</p>		
2. Be able to provide support to colleagues on incident management in a contact centre	<p>2.1 Agree with colleagues the areas in which they need support and guidance in incident management</p> <p>2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs</p> <p>2.3 Identify actions to improve team performance in incident handling from a review of incident management results</p>		

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			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 38

Title	Lead direct sales activities in a contact centre team		
Level	3		
Credit	4		
Unit accreditation no.	D/503/0397		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	✓	Initial Evidence Reference
1. Be able to carry out sales activities in a contact centre	1.1 Prepare for a direct sales activity in accordance with organisational procedures		
	1.2 Establish customer wishes and needs		
	1.3 Offer options to customers by linking their wishes and needs to products and/or services		
	1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour		
	1.5 Close the sale by agreement with the customer during the customer contact		
	1.6 Record the confirmed order in accordance with organisational procedures		
	1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre		
	1.8 Complete the authorisation or payment in accordance with organisational procedures		
2. Be able to analyse contact centre sales data	2.1 Collate sales data from direct sales activities in a format that enables data manipulation		
	2.2 Analyse sales performance against market and customer trends		
	2.3 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	<p>3.1 Identify sales activities which are capable of fulfilling the sales plan</p> <p>3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling</p> <p>3.3 Monitor the team's sales performance against agreed targets</p> <p>3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach</p> <p>3.5 Provide encouragement and guidance to team colleagues during sales activities</p>				
4. Understand sales activities in a contact centre team	<p>4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain the organisational and regulatory requirements of direct sales activities</p> <p>4.3 Explain the techniques for overcoming objections and questions from customers during sales activities</p> <p>4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective</p> <p>4.5 Explain the importance of setting a good example in a contact centre team</p> <p>4.6 Explain how to set sales targets including cross-selling and up-selling</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 39

Title		Manage diary systems	
Level		2	
Credit		2	
Unit accreditation no.		L/506/1807	
Learning Outcomes The learner will:		Assessment Criteria The learner can:	
		Initial	
		Evidence Reference	
		▼	
1. Understand the management of diary systems	1.1 Explain the importance of keeping diary systems up to date		
	1.2 Describe the basis on which bookings and changes are prioritised		
	1.3 Explain any constraints relating to making bookings for people or facilities		
	1.4 Describe the types of problems that can occur when managing diaries		
2. Be able to manage diary systems	2.1 Obtain the information needed to make diary entries		
	2.2 Make accurate and timely diary entries		
	2.3 Respond to changes in a way that balances and meets the needs of those involved		
	2.4 Communicate up-to-date information to everyone involved		
	2.5 Keep diaries up-to-date		
	2.6 Maintain the requirements of confidentiality		
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 40

Title	Contribute to the organisation of an event			
Level	2			
Credit	3			
Unit accreditation no.	L/506/1869			
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference	
1. Understand event organisation	1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event			
	1.2 Explain the purpose and features of different types of events			
	1.3 Describe the type of resources needed for different types of events			
	1.4 Describe the different needs attendees may have and how to meet these			
	1.5 Explain the requirements of health, safety and security when organising events			
	1.6 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	2.1 Identify venue requirements for an event		
		2.2 Obtain resources within the agreed timescales		
		2.3 Distribute pre-event documentation to delegates in accordance with the event plan		
		2.4 Co-ordinate attendee responses within the agreed timescale		
		2.5 Identify any special requirements of event attendees		

<p>3. Be able to set up an event</p>	<p>3.1 Set up layout and resources in accordance with the event plan</p> <p>3.2 Confirm that all identified resources are in place and meet requirements</p> <p>3.3 Behave in a way that maintains organisational values and standards</p>						
<p>4. Be able to carry out post-event actions</p>	<p>4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract</p> <p>4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event</p>						
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 41

Title	Provide reception services		
Level	2		
Credit	3		
Unit accreditation no.	H/506/1814		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
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		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 42

Title	Buddy a colleague to develop their skills		
Level	2		
Credit	3		
Unit accreditation no.	M/506/1895		
Learning Outcomes The learner will:	▼	Initial	Evidence Reference
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		
	2.1 Agree which aspects of a colleague's work may benefit from buddying		
2. Be able to plan to buddy a colleague	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		

<p>3. Be able to support a buddy colleague carrying out work activities</p>	<p>3.1 Remain unobtrusive while a buddy colleague carries out their work activities</p>				
	<p>3.2 Provide examples of how to carry out tasks correctly</p>				
	<p>3.3 Identify instances of good practice and areas for improvement through observation</p>				
	<p>3.4 Praise a buddy colleague on well completed tasks</p>				
	<p>3.5 Give constructive feedback on ways in which a buddy could improve performance</p>				
	<p>3.6 Offer a buddy hints and tips based on personal experience</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 43

Title		Employee rights and responsibilities		
Level		2		
Credit		2		
Unit accreditation no.		L/506/1905		
Learning Outcomes The learner will:		Assessment Criteria 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		
Evidence Requirements		WORKSHEET		
This is a knowledge based unit. Please see worksheet section at the end of Optional Group C.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 44

Title	Processing sales orders		
Level	2		
Credit	2		
Unit accreditation no.	M/502/8587		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
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	<p>2.1 Identify customer sales order requirements</p> <p>2.2 Check that the credit status of the customer meets organisational standards</p> <p>2.3 Confirm the availability of products and/or services to the customer</p> <p>2.4 Ensure that information given to the customer about delivery, timing and price is accurate</p> <p>2.5 Ensure that the sale is authorised following the organisation's procedures</p> <p>2.6 Finalise the transaction in accordance with organisational procedures</p> <p>2.7 Ensure that the customer is aware of the terms and conditions of sale</p> <p>2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders</p> <p>2.9 Identify who to go to when in need of support with sales order processing problems</p>			
3. Be able to follow up sales order processing	<p>3.1.1. Keep the customer informed of the sales order progress and any problems with the sale order</p> <p>3.2. Advise the customer of current discounts and special offers</p> <p>3.3. Check all information is stored securely</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Assessment of this unit may be based on either the learner's performance at work or through simulation, where necessary. If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 45

Title	Bespoke software		
Level	3		
Credit	4		
Unit accreditation no.	J/502/4397		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Input and combine information using bespoke software	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 within the application and across different software applications		
2. Create and modify appropriate structures to organise and retrieve information efficiently	2.1 Evaluate the use of software functions to structure, layout and style information 2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently 2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available		
3. Exploit the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, analyse and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs 3.4 Select and use presentation methods to aid clarity and meaning		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Assessment of this unit may be based on either the learner's performance at work or through simulation, where necessary. If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Active IQ

Westminster House
The Anderson Centre
Ermine Business Park
Huntingdon PE29 6XY

T 01480 467 950
F 01480 456 283
info@activeiq.co.uk
www.activeiq.co.uk

Active IQ wishes to emphasise that whilst every effort is made to ensure accuracy, the material contained within this document is subject to alteration or amendment in terms of overall policy, financial or other constraints. Reproduction of this publication is prohibited unless authorised by Active IQ Ltd. No part of this document should be published elsewhere or reproduced in any form without prior written permission.

Active iQ

