



SPECIFICATION

Level 2 Certificate in Principles of Customer Service

Qualification summary

RQF level	2
Qualification credit value	15 credits
Minimum credits at/above level	15 credits
Assessment requirements	Portfolio of Evidence

Aims and objectives of the qualification

The aim of this qualification is to develop learners' knowledge of Customer Service. It provides an insight into the principles of customer service and will aid career development by providing knowledge and understanding of working in this sector.

This RQF knowledge based qualification is designed for individuals who are involved in Customer Service as their primary work activity, who are seeking a career in this sector and wish to take the first steps towards professional qualifications. It is also suitable for learners who wish to gain recognition of their knowledge of Customer Service that they can apply to employment in a wide range of sectors.

Entry guidance

There are no formal entry requirements for this qualification. This qualification is suitable for those who work within a number of industries and job roles. It provides Learners with an opportunity to demonstrate their competence and knowledge in a wide range of job roles.

Progression opportunities

Learners who achieve this qualification could progress into or within employment in a number of customer service roles and/or continue their study in this or other areas. Learners who complete this qualification may go on to further study in related areas such as:

- IAO Level 2 Diploma in Customer Service
- IAO Level 3 Diploma in Customer Service
- IAO Level 2 Diploma in Team Leading

Qualification structure

To achieve the IAO Level 2 Certificate in Principles of Customer Service, learners must complete all of the required four mandatory units to gain the required 15 credits.

Unit Structures

All units are listed below

Mandatory units

Unit ref	Unit title	Level	Credit value	GLH
H/503/0322	Understanding the organisation	2	4	35
M/503/0324	Prepare to deliver excellent customer service	2	4	35
K/503/0323	Communication in the customer service role	2	5	45
F/506/2131	Understand customers	2	2	17

Title:	H/503/0322 Understanding the organisation
Level:	2
Credit value:	4
GLH:	35
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the factors that affect an organisation and the customer service role	1.1 Describe the products and services of commercial, public and third sector organisations 1.2 Describe the differences in customer service between commercial, public and third sector organisations 1.3 Outline the role played by the customer service occupation within the organisation and industry 1.4 Identify the major competitors of the organisation 1.5 Identify factors that can affect the reputation of the organisation
2. Understand employee rights, responsibilities and organisational procedures	2.1 State employer and employee rights and responsibilities under employment law and the importance of having these 2.2 Detail the employer and employee rights and responsibilities under the Health and Safety at Work Act 2.3 Describe the organisation's procedures for health and safety and documentation used 2.4 Outline how the Disability Discrimination Act relates to employment 2.5 Identify other key legislation relating to industry and organisation 2.6 Describe organisational procedures for equality and diversity detailing any monitoring and documentation activity

<p>3. Understand career pathways within customer service</p>	<p>3.1 Describe the main career pathways available within a customer service role</p> <p>3.2 Identify sources of information and advice available on the customer service industry, occupations and career progression</p> <p>3.3 Identify methods of learning available in the organisation to assist in career progression</p> <p>3.4 Identify the procedure for accessing formal learning programmes and the procedure for challenging refusal if available</p> <p>3.5 Explain how new customer service situations can aid self-development and career progression</p>
<p>4. Understand how employees are supported within the customer service role</p>	<p>4.1 Identify sources of information and advice on employment rights and responsibilities</p> <p>4.2 Identify types of representative body related to the industry</p> <p>4.3 Detail the main roles and responsibilities of each representative body and their relevance to the industry</p> <p>4.4 Outline sources of support for their role within the organisation to include issues relating to:</p> <ul style="list-style-type: none"> • Equality • Health and Safety • Career progression
<p>5. Know the organisation's policies and procedures</p>	<p>5.1 Describe the main principles, policies and procedures of their organisation and its documentation</p> <p>5.2 Explain how the organisation's principles are disseminated to employees</p> <p>5.3 Outline relevant policies and codes of practice adopted by the organisation and how employees are made aware of this</p> <p>5.4 Explain how employees are consulted on changes to the principles, procedures and policies within the organisation</p>

	5.5 Identify issues of public concern relating to their industry and organisation and how these are dealt with
Additional information about this unit N/A	
Unit aim (s)	This unit is aimed at new entrants to the field of customer service. It ensures that learners are aware of procedures, practices and legislation as well as how to identify their needs and support required in order to progress with customer service roles.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Unit F1 – Use Customer Service Language Unit F2 – Follow the rules to deliver Customer Service Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service Unit F5 – Demonstrate understanding of customer service management
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	M/503/0324 Prepare to deliver excellent customer service
Level:	2
Credit value:	4
GLH:	35
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles of customer service in an organisation	1.1 Describe the organisation's products and services 1.2 Explain how customers are made aware of the organisation's offer 1.3 Identify the customers of the organisation 1.4 Explain how to keep up to date with the organisation's offer 1.5 Describe the organisation's policies and procedures relating to customer service and the importance of following them 1.6 Describe the publicity available about the organisation's products and services 1.7 Describe the implications of poor customer service in commercial, public sector and third sector organisations
2. Understand how customer needs and expectations are identified	2.1 Outline ways in which customer expectations can be identified 2.2 Identify how customer expectations can be met within the offer of the organisation 2.3 Describe how to tell customers that their needs cannot be met by the organisation 2.4 Identify reasons for customer service being delayed and the impact of this on customers 2.5 Outline how to tell customers that the service will be delayed 2.6 Explain why it is important to keep customers informed of progress and delays when dealing with a complaint

<p>3. Understand how to balance customer expectations against the organisation's offer</p>	<p>3.1 Outline the customer service offers of two organisations to include</p> <ul style="list-style-type: none"> • one commercial organisation • one public or third sector organisation <p>3.2 Explain how resource and financial implications reflect on the organisation's offer and customers' expectations</p> <p>3.3 Explain how customers' expectation are arrived at within their organisation's offer</p> <p>3.4 Identify examples of when customer service may be limited by organisational goals</p> <p>3.5 Describe how to tell a customer that their service expectations are outside of the organisation's offer</p>
<p>4 Understand how complaints are handled</p>	<p>4.1 Explain why customers may complain to or about an organisation</p> <p>4.2 Outline the complaints handling procedure in the organisation</p> <p>4.3 Identify ways in which complaints may be defused prior to escalation to include:</p> <ul style="list-style-type: none"> • Face to face • Written (letter, email) • Via the telephone <p>4.4 Outline the effects of complaints on commercial, public sector and third sector organisations</p> <p>4.5 Explain why complaints are monitored and how the monitoring is used</p>
<p>5 Understand legislation relating to customer service</p>	<p>5.1 Identify customer service related legislation and external regulations and how these may affect customer service</p> <p>5.2 Outline how business service improvements might be limited by legislation</p> <p>5.3 Explain how the requirements of the Health and Safety at Work Act (1974) are relevant to customer service</p> <p>5.4 Explain individual health and safety responsibilities while delivering customer service</p>

	<p>5.5 Identify ways in which the security of customers and their property can be protected</p> <p>5.6 Describe how to gain approval to change customer service procedures or practices that are affected by legislation</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit is aimed at new entrants to the field of customer service. It ensures that learners are aware of procedures, practices and legislation as well as how to identify and satisfy customer needs.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	<p>Unit F1 – Use Customer Service Language</p> <p>Unit F2 – Follow the rules to deliver Customer Service</p> <p>Unit F3 – Demonstrate understanding of Customer Service</p> <p>Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service</p> <p>Unit F6 – Follow organisation rules, legislation and external regulations when managing customer service</p>

Title:	K/503/0323 Communication in the customer service role
Level:	2
Credit value:	5
GLH:	45
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the methods of communication with customers	<p>1.1 Outline why different situations need different methods of communication</p> <p>1.2 Identify communication methods suitable for a series of customer interactions</p> <p>1.3 Identify the advantages and disadvantages of the main communication methods to customers to include</p> <ul style="list-style-type: none"> • Face to face • In writing • Via telephone <p>1.4 Outline the content of a standard letter in response to a customer query</p> <p>1.5 Explain what is meant by active listening and its importance when dealing with customers</p> <p>1.6 Describe the standard greetings of three organisations and how they impact on customers</p>
2. Understand how to handle customer service information	<p>2.1 Explain what information may be held about customers by an organisation</p> <p>2.2 Outline how customer information is kept secure and confidential</p> <p>2.3 Identify information about the organisation that should not be disclosed to customers</p> <p>2.4 Explain why certain information should not be disclosed to customers and the implications on the organisation if it is</p>

<p>3. Understand how to work as part of a team to provide effective customer service</p>	<p>3.1 Outline limits of individual role when delivering customer service</p> <p>3.2 Identify others involved in the customer service function</p> <p>3.3 Identify sources of assistance for queries outside individual responsibility</p> <p>3.4 Explain how other team members can assist in offering excellent customer service</p> <p>3.5 Explain the importance of keeping colleagues and others informed of customer service operations</p> <p>3.6 Outline how customer queries can aid individual and colleague's development</p> <p>3.7 Explain how to disseminate customer service information for the benefit of colleagues</p>
<p>4. Understand how to meet the needs of a diverse range of customers</p>	<p>4.1 Identify the main types of customer that may need to be dealt with</p> <p>4.2 Describe the aids available to assist customers with special requirements</p> <p>4.3 Outline how to respect cultural diversity in customer service</p> <p>4.4 Explain how to recognise the following types of customer</p> <ul style="list-style-type: none"> • Angry • Distressed • Upset • Violent <p>4.5 Explain how to deal with customers who are</p> <ul style="list-style-type: none"> • Angry • Distressed • Upset • Violent
<p>5 Understand the importance of promoting and evaluating products and services</p>	<p>5.1 Detail how products and services can be promoted in an organisation</p> <p>5.2 Explain the importance of evaluating customer service</p> <p>5.3 Identify methods of evaluation of the customer experience that may be used</p>

	<p>5.4 Detail how customer feedback is disseminated to colleagues</p> <p>5.5 Explain how evaluation can lead to customer service improvements</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit is aimed at new entrants to the field of customer services. It ensures that they have the necessary knowledge to deal with a variety of customers in different situations. It also ensure the necessary knowledge of information security and of evaluation of customer service.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Unit F1 – Use Customer Service Language</p> <p>Unit F2 – Follow the rules to deliver Customer Service</p> <p>Unit F3 – Demonstrate understanding of Customer Service</p> <p>Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service</p> <p>Unit F5 – Demonstrate awareness of Customer Service Management</p>

Title:	F/506/2131 Understand customers
Level:	2
Credit value:	2
GLH:	17
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers
2 Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the underpinning knowledge required to understand customers. Upon completion of this unit, learners will have developed an understanding of different types of customers and will also know the value of customers and their loyalty.

Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards