



SPECIFICATION

IAO Level 3 Diploma in Customer Service

Qualification summary

RQF level	3
Qualification credit value	55 credits
Minimum credits at/above level	40 credits
Assessment requirements	Portfolio of Evidence
	This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).
Aims and objectives of the qualification	<p>The Level 3 Diploma in Customer Service is for learners who work in a customer facing environment with responsibility for improving and maintaining the standard of customer care.</p> <p>The aim of this qualification is to recognise learners' achievements within the customer service environment. It is also for learners whose job role requires them to deliver continually improving service to customers. These learners may be in roles that carry a customer service specific job title, or their primary responsibility is to deliver excellent service to customers.</p> <p>This qualification can also be used by learners who may not regard customer service as their primary responsibility, but recognise that customer service competencies are essential to complement their technical skills</p> <p>The units incorporate recognised customer service terminology and cover up to date techniques and mediums for the delivery of customer service, including online services and social media. Employers have been consulted throughout the development to ensure the content of the qualification is full and relevant to ensure learners are occupationally competent in the workplace.</p>

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 3 Diploma in Business Administration
- IAO Level 3 Diploma in Team Leading
- IAO Level 3 Diploma in Retail Skills

Qualification structure

To achieve this qualification learners must complete a **minimum of 55 credits**:

- **31 credits** from **Mandatory Group A**
- 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 through the completion of units at Level 3 and above.

The total Guided Learning Hours (GLH) for this qualification is 289 to 375 hours

Unit Structures

Mandatory units are listed below.

Mandatory units

Unit ref	Unit title	Level	Credit value	GLH
L/506/2150	Organise and deliver customer service	3	5	27
Y/506/2152	Understand the customer service environment	3	5	40
J/506/2910	Understand customers and customer retention	3	4	35
K/506/2169	Resolve customers' problems	3	4	19
D/506/1942	Principles of business	3	10	74
T/506/2952	Manage personal and professional development	3	3	12

Optional units group B

Unit ref	Unit title	Level	Credit value	GLH
Y/506/2166	Develop resources to support consistency of customer service delivery	3	5	21
D/506/2167	Use service partnerships to deliver customer service	3	3	20
R/506/2151	Resolve customers' complaints	3	4	22
D/506/2170	Gather, analyse and interpret customer feedback	3	5	24
K/506/2172	Monitor the quality of customer service interactions	3	5	27
D/506/2119	Communicate verbally with customers	2	3	14
T/506/2126	Communicate with customers in writing	2	3	20
L/506/2133	Promote additional products and/or services to customers	2	2	14
Y/506/2135	Exceed customer expectations	2	3	15
T/506/2143	Deliver customer service whilst working on customers' premises	2	4	20
F/506/2159	Deliver customer service to challenging customers	2	3	16
Y/506/2149	Develop customer relationships	2	3	18
T/506/2160	Support customer service improvements	2	3	12
A/506/2161	Support customers through real-time online customer service	2	3	15
H/506/2977	Support customers using self-service equipment	2	3	18
J/506/2163	Use social media to deliver customer service	2	3	18
K/506/2978	Provide post-transaction customer service	2	5	22

D/506/2153	Champion customer service	4	4	17
R/506/2179	Build and maintain effective customer relations	4	6	25
L/506/2181	Manage a customer service award programme	4	4	15
Y/506/2183	Manage the use of technology to improve customer service	4	4	14
D/506/2962	Develop a social media strategy for customer service	4	5	16
J/507/8606	Understanding customer service staffing schedules	3	2	7
Y/507/8609	Principles of customer service improvements	3	2	9
D/507/8613	Principles of managing customer service performance	3	3	16
M/507/8616	Understand customer relationships and customer retention	3	3	14
T/507/8617	Understanding effective communication in customer services	3	2	10

Optional units group C

Unit ref	Unit title	Level	Credit value	GLH
H/506/1912	Negotiate in a business environment	3	4	18
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3	15
A/506/1821	Manage team performance	3	4	21
J/506/1921	Manage individuals' performance	3	4	20
M/506/1931	Collaborate with other departments	3	3	14
F/502/8612	Negotiating, handling objections and closing sales	3	4	22

R/502/8615	Obtaining and analysing sales-related information	3	4	24
K/502/8622	Buyer behaviour in sales situations	3	3	27
K/503/0418	Manage incidents referred to a contact centre	3	6	30
D/503/0397	Lead direct sales activities in a contact centre team	3	4	8
L/506/1807	Manage diary systems	2	2	12
L/506/1869	Contribute to the organisation of an event	2	3	23
H/506/1814	Provide reception services	2	3	15
M/506/1895	Buddy a colleague to develop their skills	2	3	19
L/506/1905	Employee rights and responsibilities	2	2	16
M/502/8587	Processing sales orders	2	2	17
J/502/4397	Bespoke software	3	4	30

Title:	L/506/2150 Organise and deliver customer service
Level:	3
Credit value:	5
GLH:	27
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to organise customer service delivery	<ul style="list-style-type: none"> 1.1 Explain how different methods of promoting products and/or services impact on customer service 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	<ul style="list-style-type: none"> 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

<p>3. Be able to deliver customer service</p>	<p>3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives</p> <p>3.2 Agree realistic and achievable actions with customers</p> <p>3.3 Identify areas for improvement in their own customer service delivery</p> <p>3.4 Adapt their own customer service delivery to meet customers' changing expectations</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to organise and deliver customer service. Upon completion of this unit, learners will be able to both plan and execute the delivery of customer service.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSB10 Organise the delivery of reliable customer service • CFACSB2 Deliver reliable customer service

Title:	Y/506/2152 Understand the customer service environment
Level:	3
Credit value:	5
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the concepts and practices underpinning customer service delivery	<p>1.1 Explain the value of customer service as a competitive tool</p> <p>1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service</p> <p>1.3 Describe techniques used to identify service failures</p> <p>1.4 Explain the concept and importance of the service profit chain</p> <p>1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service</p>
2. Understand the relationship between customer service and a brand	<p>2.1 Explain the importance of a brand to customers and to an organisation</p> <p>2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services</p> <p>2.3 Explain the potential impact of good and poor customer service on a brand</p>
3. Understand the structure of customer service	<p>3.1 Explain the features of different customer service models and customer service standards</p> <p>3.2 Explain the relationship between customer service and operational areas of an organisation</p> <p>3.3 Explain the relationship between customer service and continuous improvement processes</p> <p>3.4 Explain the costs and benefits of customer service to an organisation</p>

	<p>3.5 Explain the impact of organisational values on how customers create their expectations</p> <p>3.6 Explain how organisational values impact on meeting customer expectations</p>
4. Understand the implications of legislation on customer service delivery	<p>4.1 Explain the implications of consumer-related legislation on customer service delivery</p> <p>4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information</p>
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding the customer service environment. Upon completion of this unit, learners will have developed an understanding of the structure of customer service and the key concepts and practices that underpin customer service delivery. Learners will be aware of the relationship between customer service and a brand and will understand the implications of legislation on customer service delivery.
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>Customers Service (2013) National Occupational Standards</p> <ul style="list-style-type: none"> • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA14 Use customer service as a competitive tool

Title:	J/506/2910 Understand customers and customer retention
Level:	3
Credit value:	4
GLH:	35
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand Customer Relationship Management (CRM)	<p>1.1 Explain the concept of the “customer experience”</p> <p>1.2 Explain different methods of segmenting and characterising customers</p> <p>1.3 Explain the purpose and scope of CRM</p> <p>1.4 Describe the features of an effective CRM system</p> <p>1.5 Explain the uses of CRM data in customer service delivery</p>
2. Understand customer retention	<p>2.1 Explain the term customer retention</p> <p>2.2 Explain the benefits of customer retention to an organisation</p> <p>2.3 Explain the factors that influence customer retention</p> <p>2.4 Describe techniques used to attract and retain customers</p> <p>2.5 Explain how to assess the extent of customer loyalty</p> <p>2.6 Explain the factors involved in customer recovery</p>
3. Understand the measurement of customer satisfaction	<p>3.1 Describe techniques used to analyse performance data</p> <p>3.2 Explain the factors to be taken into account in setting performance targets and objectives</p> <p>3.3 Explain the features and uses of a range of techniques to measure customer satisfaction</p>

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding customers and customer retention. Upon completion of this unit, learners will have developed an understanding of Customer Relationship Management (CRM), customer retention, and the measurement of customer satisfaction.
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 <ul style="list-style-type: none"> • CFACSB14 Review the quality of customer service • CFACSB15 Build and maintain effective customer relations

Title:	K/506/2169 Resolve customers' problems
Level:	3
Credit value:	4
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the monitoring and resolution of customers' problems	<p>1.1 Assess the suitability of a range of techniques for monitoring customer problems</p> <p>1.2 Explain how to use the resolution of customers' problems to improve products and/or services</p> <p>1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance</p> <p>1.4 Explain the features of negotiating techniques used to resolve customers' problems</p>
2. Be able to deal with customers' problems	<p>2.1 Confirm the nature and cause of customers' problems</p> <p>2.2 Explain when customers' problems should be treated as complaints</p> <p>2.3 Explain the benefits to customers and the organisation of the options available to solve problems</p> <p>2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems</p> <p>2.5 Explain to customers the options for resolving their problems</p> <p>2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority</p> <p>2.7 Inform colleagues of the nature of problems and actions taken</p>

	<p>2.8 Evaluate the effectiveness of the resolution of customers' problems</p> <p>2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to resolve customers' problems. Upon completion of this unit, learners will be able to deal with customers' problems.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Customers Service (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFACSC5 Monitor and solve customer service problems

Title:	D/506/1942 Principles of business
Level:	3
Credit value:	10
GLH:	74
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand business markets	<p>1.1 Explain the characteristics of different business markets</p> <p>1.2 Explain the nature of interactions between businesses within a market</p> <p>1.3 Explain how an organisation's goals may be shaped by the market in which it operates</p> <p>1.4 Describe the legal obligations of a business</p>
2. Understand business innovation and growth	<p>2.1 Define business innovation</p> <p>2.2 Explain the uses of models of business innovation</p> <p>2.3 Identify sources of support and guidance for business innovation</p> <p>2.4 Explain the process of product or service development</p> <p>2.5 Explain the benefits, risks and implications associated with innovation</p>
3. Understand financial management	<p>3.1 Explain the importance of financial viability for an organisation</p> <p>3.2 Explain the consequences of poor financial management</p> <p>3.3 Explain different financial terminology</p>
4. Understand business budgeting	<p>4.1 Explain the uses of a budget</p> <p>4.2 Explain how to manage a budget</p>
5. Understand sales and marketing	<p>5.1 Explain the principles of marketing</p> <p>5.2 Explain a sales process</p>

	<p>5.3 Explain the features and uses of market research</p> <p>5.4 Explain the value of a brand to an organisation</p> <p>5.5 Explain the relationship between sales and marketing</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding business and introduces learners to the key principles of business. Upon completion of this unit, learners will develop an understanding of a variety of business principles, including business markets, business innovation and growth, and sales and marketing. Learners will also present knowledge of financial management and business budgeting.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Business & Administration (2013) National Occupational Standards</p>

Title:	T/506/2952 Manage personal and professional development
Level:	3
Credit value:	3
GLH:	12
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to identify personal and professional development requirements	<p>1.1 Compare sources of information on professional development trends and their validity</p> <p>1.2 Identify trends and developments that influence the need for professional development</p> <p>1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation</p>
2. Be able to fulfil a personal and professional development plan	<p>2.1 Evaluate the benefits of personal and professional development</p> <p>2.2 Explain the basis on which types of development actions are selected</p> <p>2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis</p> <p>2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives</p> <p>2.5 Execute the plan within the agreed budget and timescale</p> <p>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>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>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to develop the knowledge and skills required to manage personal and professional development. Upon completion of this unit, learners will be able to identify personal and professional development requirements and fulfil a personal and professional development plan. Learners will also be able to maintain a personal and professional development plan ensuring its relevance.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Management & Leadership (2012) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFAM&LAA2 Develop your knowledge, skills and competence • CFAM&LAA1 Manage yourself