

## EDI Level 3 NVQ in Customer Service



Supporting learning  
and performance

### Support Pack

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## INTRODUCTION

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### ABOUT EDI

EDI is one of the largest awarders of accredited vocational qualifications in the UK and has been involved in providing qualifications for employment for over 100 years. We work with over 1400 centres and we award over 140,000 vocational qualification certificates every year. Our vocational qualifications are developed in collaboration with industry and are used by students and employers as a benchmark for practical skills and quality. They include National Vocational Qualifications (NVQs), Scottish Vocational Qualifications (SVQs), Vocationally Related Qualifications (VRQs), Technical Certificates, apprenticeships and Skills for Life qualifications.

EDI qualifications are accredited on the National Qualifications Framework and are eligible for government funding. EDI qualifications are also accredited on the Qualifications and Credit Framework (QCF). EDI offers unrivalled centre support, through online administration, resources and customer care.

In addition, EDI provides a wide range of services for training providers, colleges, employers and schools including customised assessments, bespoke training programmes, innovative interactive online assessments mapped to the national curriculum, an electronic portfolio system, access to high volume printing and broadband facilities. For more details, please visit the EDI website: [www.ediplc.com](http://www.ediplc.com).

### THE SUPPORT PACK

This support pack has been developed to provide additional guidance for training providers, assessors and verifiers who will be helping candidates to achieve the EDI Level 3 NVQ in Customer Service.

It has two purposes:

- To provide, in one place, all of the additional information that may be needed to prepare for, and then support the successful delivery of this NVQ.
- By collecting this information together, to provide a resource that can be updated easily and quickly when it becomes necessary, and made available to all users.

This support pack has a version number and date on the front cover. An up to date copy of this support pack is always downloadable from our website [www.ediplc.com](http://www.ediplc.com) in pdf format.

If this pack is updated we will let you know in EDI Qualifications Update – our monthly newsletter to approved centres. This is available to download from our website [www.ediplc.com](http://www.ediplc.com). If you would like to receive an electronic copy of the EDI Qualifications Update each month, please contact our Enquiries team on [enquiries@ediplc.com](mailto:enquiries@ediplc.com).

Please note that throughout this support pack, the term 'learner' is used to refer to the person seeking to gain this NVQ.

## **WHAT IS A NATIONAL VOCATIONAL QUALIFICATION?**

National Vocational Qualifications are developed from National Occupational Standards that are based on typical job responsibilities within an industry.

Each standard is an individual unit of competence. The unit describes an area of an individual's job role and the industry standard that is required.

NVQs are work-based qualifications that assess an individual's competence to do a job.

NVQs differ from more traditional qualifications in the following ways:

- There are no formal entry requirements; learners are not required to have any prior qualifications to achieve the NVQ
- Learners are principally assessed on their ability to do the job, rather than by means of examinations
- Assessment is via a portfolio of evidence
- They can be gained in a variety of ways
- They take account of previous experience
- They allow individuals to work at their own pace
- Assessment is undertaken, where possible, in the work environment
- Each unit can be achieved individually as a Unit of Credit; the full NVQ is awarded when the required number of units has been achieved
- The NVQ is based on the National Occupational Standards and is recognised by the relevant industry.

## **HOW ARE NVQS ASSESSED?**

Assessment is the process used to judge a learner's competence at work.

The assessor is usually the person who is responsible for providing training to the learner, and who has the greatest number of opportunities to observe a learner's performance. The assessor may be a work place supervisor.

Assessors must be trained and qualified (or working towards a qualification – the 'A Units'). Assessors base their judgements on a learner's performance and decide how it compares with the National Occupational Standard. The assessor will also ask the learner questions based on the knowledge required to do the work to ascertain the learner's understanding of the job role.

When all of the required units have been completed and the assessor is satisfied that the learner has met the National Occupational Standard, a recommendation for certification will be made.

An Internal Verifier is responsible for the quality assurance of NVQs within the training organisation. The Internal Verifier provides advice and support to the assessor's line manager. The Internal Verifier provides advice and support to the assessors and ensures that the assessors apply the standards consistently and fairly. The Internal Verifier will see the learner's portfolio of evidence during the assessment process.

An External Verifier, who is appointed by EDI, will verify the assessment and internal verification decisions involved in the development of the learner's portfolio.

The External Verifier will quality assure the NVQ process which ensures that certification of the NVQ is reliable, consistent and to the National Occupational Standard, by checking that the consistency of assessments made by the training providers, continues to meet the approval criteria.

## **EDI CUSTOMER SERVICE FOR NVQS**

EDI is committed to the highest possible level of customer service. The following customer service statement aims to provide a summary of the service levels that we offer to our training providers (centres) and candidates.

### **1 Service Commitments**

#### **Centre Approval**

- Applications for approval to offer NVQs with EDI for the first time will be processed within 40 days of receipt.
- Requests to offer additional NVQs from existing NVQ Centres will be processed within 2 weeks of receipt.

#### **Candidate Pack Orders**

- Orders will be dispatched within 5 working days of receipt.

#### **Candidate Registrations**

- Candidates will be registered and a registration number allocated within 5 working days of receipt. Registration requests using Campus will be processed immediately.

#### **Certificates**

- All certificate claims will be processed and dispatched within 5 working days; we aim to process all certificates within 2 working days. For centres with direct claims status using Campus, certificates will be dispatched within one working day.

#### **Queries**

- All requests for information will be responded to within 3 working days of receipt. Verbal enquiries are usually dealt with by EDI's Enquiries or Centre Support teams immediately. Complaints are responded to within 3 working days.

### **2 Centre Approval and Quality Assurance**

EDI offers detailed information and guidance in the following areas of the EDI NVQ centre approval process:

- The role of the awarding body in the NVQ process
- The terms and conditions of approved Centre status
- How applications for approval are processed
- External verification procedures
- The frequency and scope of external verification visits
- External verification reporting mechanisms.

This information can be found on our website [www.ediplc.com](http://www.ediplc.com) or by contacting our Enquiries team at [enquiries@ediplc.com](mailto:enquiries@ediplc.com).

EDI also encourages all centres to develop customer service standards in order to build a high level of customer service into the NVQ process.

### **3 Fees**

Fees for learner registration, certification (including unit certification), centre approval and additional verification visits are available in the EDI price lists.

## 4 Support Services

Our Enquiries or Centre Support teams can be contacted between the hours of 0830 and 1700 Monday to Friday by using the contact details below or outside those hours by leaving a message on our voicemail service. **All messages will be returned the next working day.**

Enquiries team (general enquiries)

Telephone helpline: 08707 202 909  
Fax: 02476 516559  
Email: [enquiries@ediplc.com](mailto:enquiries@ediplc.com)

Our Enquiries team will be happy to assist you with any general enquiries that you may have, for example:

- Information relating to new or existing products and services, including launch dates, award content and links with existing products
- Enquiries regarding qualification structures and content
- Pricing enquiries including price list requests
- Support on the use of EDI's websites
- International customer service queries
- General information requests including, address, fax number etc
- Initial enquiries from new centres interested in working with EDI
- Maintaining accurate contact details for centres.

Centre Support team (Campus and administration enquiries)

Telephone helpline: 08700 818 008  
Fax: 02476 516566  
Email: [centresupport@ediplc.com](mailto:centresupport@ediplc.com)

Our Centre Support team will be happy to assist with any administration related enquiries you may have, For example:

- Enquiries relating to EDI centre approval
- Centre induction and training
- Campus user guidance
- Queries relating to external verifiers
- Campus technical support, including IT support for online and off-line examinations
- The progress of an order or a query relating to a candidate registration
- The progress of results, issues with claims including manual claims and certification
- Invoice queries.

EDI logs and monitors response times to all queries to Enquiries and Centre Support in order to achieve ongoing customer service standard improvements.

## 5 Complaints and Appeals Procedures

Details relating to all aspects of complaints and appeals for centres, including circumstances under which a centre or learner is entitled to appeal can be found within this support pack or by contacting our Enquiries Team on 08707 202 909.

Every EDI NVQ candidate pack includes details of the complaints and appeals procedure.

All complaints will be responded to within 3 working days.

## **6 Equal Opportunities Policy**

EDI operates an equal opportunities policy, further details of which can be found on our website [www.ediplc.com](http://www.ediplc.com).

Further general information about NVQs offered by EDI can be obtained by contacting our Enquiries team on 08707 202 909 or by emailing [enquiries@ediplc.com](mailto:enquiries@ediplc.com).



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## **ADMINISTRATIVE PROCEDURES**

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This section of the support pack details the range of administrative procedures that will need to be in place in order for you to deliver this NVQ.

It includes:

- Centre approval
- The candidate pack
- Learner registration
- Campus
- Ongoing quality assurance.

### **CENTRE APPROVAL**

In order to offer this NVQ, you must be approved by EDI. Centre approval is based upon the training provider's ability to show that the necessary resources and management systems are in place to maintain standards of delivery and quality.

Centre approval is based upon completion of Form CAUK, which is a formal statement from the provider confirming what will be provided. This form can be found on our website or requested from our enquiries team.

#### **Approval Visit**

When you send Form CAUK to us, this is normally followed by an approval visit carried out by an External Verifier. The purpose of this visit is to verify the statements made on Form CAUK and to provide guidance and support to all those who will be responsible for delivering this NVQ.

### **THE CANDIDATE PACK**

After a centre has been approved, the first stage in the procedure for registering learners with EDI is to purchase a credit for the NVQ. This can be done by using Campus, EDI's online administration system.

Please contact our Centre Support team on 08700 818 008 for further information on EDI's Campus system.

Note that for some NVQs, we offer a package where candidates can be registered with us for the constituent parts of an Apprenticeship, for example:

- Key skills
- The NVQ
- A technical certificate.

The candidate pack is individual to each learner and includes everything that is needed for the individual to complete all of the requirements for this NVQ.

The candidate pack includes:

- Guidance for the learner
- The standards
- Evidence matrices, to be completed by the learner and the assessor as part of the learner's portfolio
- Learner and assessor statements forms, for each unit, to be signed off by the External Verifier before they are sent to EDI.

## **LEARNER REGISTRATION**

The next stage is to register the learners by name. This is usually done early in the process to ensure that the requirements of the 10-week rule are met; learners must be registered with EDI at least 10 weeks before the first claim can be made for a unit or units.

## **CAMPUS**

EDI's online examination and NVQ administration and management system, Campus, is available to EDI approved centres. Campus is an integrated solution providing everything from candidate registration through to exam paper production (or online assessment) and result and certification release.

Campus can be accessed by using the following link: <http://Campus.ediplc.com> or through the login section on [www.ediplc.com](http://www.ediplc.com).

Campus guidance documents can be found on the website or they can be obtained by contacting EDI's Centre Support team on 08700 818 008.

## **ONGOING QUALITY ASSURANCE**

EDI maintains the quality of delivery and assessment of this NVQ through a system of ongoing monitoring visits undertaken by the External Verifier.

To ensure consistency, External Verifiers are trained by EDI to undertake these visits, which are focused on completion of Form CAUK. These visits will also be used by the External Verifier to provide updated information to you about the delivery of this NVQ, for example, interpretation of standards or the assessment strategy.

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## **ASSESSMENT**

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Assessment for this NVQ takes the form of:

- On-going review of candidate performance by the assessor and internal verifier.

This section of the Support Pack covers:

- the assessment strategy for this NVQ
- the evidence matrix
- learner and assessor statement forms
- the appeals procedure for learners

### **THE ASSESSMENT STRATEGY FOR THIS NVQ**

General guidance on the approaches to be taken to assessment and the quality of assessment has been developed in the form of an assessment strategy.

You should consider all aspects of the assessment strategy when preparing to offer this NVQ.

The assessment strategy for Customer Service NVQs at Levels 2-4 was developed by the Institute of Customer Service in January 2006.

The following sections have been taken from the ICS Assessment Strategy and are particularly relevant for centres offering or intending to offer the NVQs.

# ASSESSMENT STRATEGY FOR CUSTOMER SERVICE S/NVQs AT LEVELS 2, 3 AND 4

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This document gives details of the Assessment Strategy for the Customer Service S/NVQs at Levels 2, 3 and 4. It gives the key requirements for Customer Service Awarding Bodies, External and Internal Verifiers, Assessors and S/NVQ Centres regarding:

1. External Quality Control
2. Assessor and Verifier Occupational Competence
3. Workplace Performance and Simulation

## **1. External Quality Control of Assessment**

### **1a Monitoring Centre Performance**

Awarding bodies:

- A carry out thorough risk assessments of organisations applying to become Approved Centres for the Customer Service Level 2, 3 and 4 S/NVQs, following the requirements of the regulatory bodies;
- B apply quality control management measures appropriate to assess each centre's risk;
- C ensure that all Centres using simulation or a Realistic Working Environment have followed the criteria in this Assessment Strategy as part of centre approval;
- D ensure that External Verifiers check the provision of simulation and/or Realistic Working Environment against the criteria during their first visit;
- E ensure that External Verifiers continue to check this on every subsequent visit.

### **1b External Verification**

Awarding Bodies will appoint External Verifiers and will monitor all External Verifier practices.

Customer Service Awarding Bodies will facilitate External Verification by ensuring External Verifiers have:

- F a thorough knowledge of the Level 2, 3 or 4 National Occupational Standards for Customer Service, appropriate to the Level the EV is working with, and the ability to interpret them across a wide variety of Customer Service environments;
- G experience and working knowledge of the operational and assessment processes of the Customer Service S/NVQ at the Level the EV is working with ;
- H relevant and credible customer service experience across the level and breadth of the National Occupational Standards and S/NVQs at the Level the EV with working with;
- I knowledge of current customer service practice and emerging issues in the customer service arena;
- J high levels of communication and interpersonal skills.

To facilitate this Awarding Bodies will:

- K circulate and disseminate information appropriate to the job role, from the ICS, to all EVs when this supports the Awarding Body communication strategy/schedule;
- L advise EVs of the availability of the ICS Web Pages;
- M hold briefings for External Verifiers about the revised Customer Service Standards and S/NVQs;
- N encourage EVs to take part in ICS events regarding the Customer Service Standards and S/NVQs whenever this is felt appropriate;
- O seek centre feedback regarding the performance of External Verifiers and act on this feedback
- P ensure that centres have requested feedback from their employers in the feedback process

- Q ensure that External Verifiers follow the relevant regulatory code of practice for EVs and if no code of practice is developed (as in Scotland) Awarding Bodies will develop their own and apply it
- R ensure that where a Realistic Working Environment is used IVs and EVs carry out a full examination of the working practices and the assessment process;
- S ensure that IVs and EVs carry out a full examination of any simulated activities where these are used.

## 2. Assessor, Internal and External Verifier Occupational Competence

**Level 2** The table at **Appendix A** shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 2.

**Level 3** The table at **Appendix B** shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 3.

**Level 4** The table at **Appendix C** shows the ICS requirements for the Occupational Competence of Assessors, Internal and External Verifiers at Level 4.

In these tables the ICS has suggested some ways in which Awarding Bodies can gain evidence to meet these requirements – these are not compulsory, just a guide. The tick boxes on the right show whether the evidence applies to Assessors (A), Internal Verifiers (IV) or External Verifiers (EV)

## 3. Simulation and realistic workplace performance

Wherever possible, assessment of the all Customer Service National Occupational Standards and S/NVQ should be carried out in a **real job (either paid or voluntary)**.

Where this is not possible [this Assessment Strategy](#) does allow for:

- ▶ the use of **simulation** for **units 1,5 and 6**

To undertake assessment of simulated activities for these three units the Guidelines for Simulation shown at **Appendix D** must be met.

- ▶ the use of a **Realistic Working Environment including work experience and work placement** for **units 9,10,11,12,13,14,15,16,17,21,22,23,31,36,37,38**

To undertake assessment in a Realistic Working Environment the Guidelines shown at **Appendix E** must be met.

**All other Units must be achieved in a real working situation (either paid or voluntary)**

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	APPENDIX A		
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DfES and Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓
4	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5	Relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 2	gathering feedback from a variety of employers and centres			✓
		demonstrating at least 1 years experience of delivering Customer Service as part of their job	✓	✓	
		demonstrating at least 2 years experience of delivering Customer Service as part of their job			✓
6	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE.	producing certificates or evidence of working towards these units	✓	✓	✓
7	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DFES and Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 3	gathering feedback from a variety of employers and centres			✓
		demonstrating at least 2 year's experience of delivering Customer Service as part of their job	✓	✓	
		demonstrating at least 3 year's experience of delivering Customer Service as part of their job			✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE.	producing certificates or evidence of working towards these units	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

The Assessor, IV and EV working at Level 4 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 4 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Bodies, DfES and Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 4	gathering feedback from a variety of employers and centres			✓
		demonstrating at least 3 year's experience of delivering Customer Service as part of their job	✓	✓	
		demonstrating at least 4 year's experience of delivering Customer Service as part of their job			✓
6.	Appropriate A and V Units according to their role – Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVS and within 12 months for EVs. In Scotland all assessors and verifiers should be able to show that they possess formal recognition of achievement of the appropriate assessment and verification units of competence, or show that they are working towards achieving these units of competence or hold TQFE or TQSE.	producing certificates or evidence of working towards these units	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

### Simulated Activities Guidelines for Customer Service National Occupational Standards (Units 1,5 and 6 only)

Simulation is defined by the ICS as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions.

To undertake the assessment of simulated activities for these three units the following guidelines must be met:

- a. when role playing, candidates and anybody taking part as a customer must have a brief that gives sufficient information for them to recognise the equivalent real situation and decide what they would do and say;
- b. the simulated situation should represent normal and routine experience wherever possible and not exceptional or unusually difficult circumstances that might be faced;
- c. the person taking part in the simulation as a customer must be credible for the situation that is being simulated;
- d. any resources or equipment that would normally be in real work should be available and in working order for the simulation;
- e. candidates should complete the required tasks to the National Occupational Standards and in the timescales that would normally be expected in real work;
- f. candidates should complete the required tasks taking account of legislation and regulation that would apply in real work;
- g. candidates must carry out the simulated activity in a professional manner taking into account establishment requirements such as appearance and dress code, personal conduct, hygiene, reliability and punctuality;
- h. whilst the primary purpose of the Simulation is for Assessment, feedback must be given in a way that builds confidence.

## **Realistic Working Environment Guidelines for Customer Service National Occupational Standards**

**(Units 9,10,11,12,13,14,15,16,17,21,22,23,31,36,37,38 only)**

It is essential that organisations wishing to operate a Realistic Working Environment (RWE) operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

- a. assessments must be carried out under realistic business pressures, using real customers and within a defined service offer;
- b. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations;
- c. candidates must be expected to achieve a volume of work comparable to normal business practices;
- d. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available. They must enable candidates to meet the requirements of the National Occupational Standards;
- e. account must be taken of any legislation or regulations in relation to the type of work that is being carried out;
- f. candidates must be given workplace responsibilities to enable them to meet the requirements of the Customer Service National Occupational Standards at Level 2;
- g. candidates must show that their productivity reflects those found in the work situation being represented;
- h. customer perceptions of the RWE is similar to that found in the work situation being represented;
- i. the RWE is managed as a real work situation.

## **CLAIMS TO COMPETENCE**

Claims to competence comprise the Evidence Matrix and Learner and Assessor Statement Forms and are located in each Candidate Pack. Claims to competence may be submitted to EDI at any time after the initial 10 weeks has passed since learner registration. However, a full certificate for the EDI Level 3 NVQ in Customer Service will not be awarded until the learner has successfully completed all of the required units for the NVQ.

Each form is completed by the assessor and the learner and it is signed off by the EDI External Verifier. It is then sent to EDI for processing.

## **THE EVIDENCE MATRIX**

The Evidence Matrix is designed to help with evidence collection. It is a mapping activity to ensure that learners have covered the “Customer Service Standards” and “Knowledge and Understanding” contained in each unit, and is intended to help to keep the volume of evidence to a minimum. One Matrix should be completed for each unit.

It is expected that a selection of various types of evidence will be used as appropriate; columns in the Matrix enable learners or assessors to enter the evidence type, eg Report, Log, Written Statement, and also the assessment method, eg Obs (= Observation), as shown in the Assessment method key. By learners inserting portfolio reference numbers in the boxes provided, learners will enable the Assessor, Internal Verifier and External Verifier to quickly locate the evidence which learners are submitting to demonstrate their competence.

### **Examples of types of evidence learners could provide to prove competence:**

- Record of observation of performance in the workplace
- Professional discussion
- Reflective account
- Product evidence (eg implementation plans, correspondence, work records)
- Work-based projects
- Testimony from senior colleagues/clients
- Personal report of actions and circumstances
- Accreditation of Prior Learning/Achievement (APL/A)
- Special projects, assignments or simulations
- Records of questioning

An example of the Evidence Matrix follows.









## LEARNER STATEMENT AND ASSESSOR SUMMATIVE STATEMENT

The second section of the Claim to Competence gives learners an opportunity to summarise details of the work they have carried out, paying particular attention to how they have covered the Performance Indicators and Knowledge where required.

Each time a learner completes a unit and has signed off the evidence matrix the assessor will be required to complete the details on the claim to competence form, ie. the unit number and the date of the summative assessment. Both learner and assessor are required to enter their initials. If the internal verifier has sampled that unit, he or she will also be required to enter the date and his or her initials.

Once the learner has completed some or all of the units and decides that it is time to claim these, the learner will need to write a statement showing how he or she achieved the unit/s. This should show

- How the learner completed the units/award and what she or he has learnt from the experience
- How long the learner has been in his or her current role and working towards this qualification
- The assessment methods used to show competence
- How this has affected the way the learner approaches his or her job.

The assessor is also required to write a statement. This should provide support for the learner's statement and any supplementary information about how the learner achieved the unit/s drawing on the learner's particular circumstances.

An example of a completed claim to competence form with learner and assessor summative statements follows. This is for guidance only to give an indication of the kind of things that should be mentioned.

*A claim should only be submitted when there is sufficient evidence to fulfil all of the above.*

It is understood, however, that learners may not always have evidence to cover the full range of situations that are indicated. Nonetheless, the Claim to Competence cannot be agreed and signed by the assessor until the assessor is sure that the learner could operate across a range of different situations. As such, where visible evidence is not present, the assessor will need to interview the learner to cover these aspects. Overall it is recommended that the portfolio is as complete as possible in order to fully demonstrate and support the Claim to Competence and in order to clarify this claim to the assessor as effectively as possible.

A completed CTC form (completed by both learner and assessor) and blank CTC form to follow.

**CLAIM TO COMPETENCE**

**Candidate name:**  **Registration number:**

**Qualification title:**  **Number of units completed for this claim (write in words):**  **Full Award: Yes/No**

UNIT No	Summative Assessment Date	Candidate Initials	Assessor Initials	Internal Verifier Date	IV Initials	UNIT No	Summative Assessment Date	Candidate Initials	Assessor Initials	Internal Verifier Date	IV Initials

**LEARNER STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED**

Completing these 3 units has been very enjoyable and I have realised whilst doing them that I have learnt a great deal about the way I work and also about my employment rights and responsibilities. I have gathered evidence from my job role within The Office, my workplace and have used specific work situations that clearly show how I am able to interact and work within my team and also how I take responsibility for ensuring that I work within the requirements of my organisation. I am always keen to keep up to date with new changes within work and also I like to learn new tasks and take on new challenges.

Within my evidence I have shown that I am sensitive and able to work with a diverse work force and also that I take note of colleagues' needs and beliefs. I am fully aware of my employment rights and responsibilities and have even guided colleagues to websites I used for research for their own learning.

I am an H&S rep in the office and so completing this unit was not a problem for me. I used copies of risk assessments that I had carried out and also my assessor carried out a discussion with me around this unit. Across all of the units, my assessor has observed me and has questioned me to back up the observations.

I realise now just how much I do at work and how completing these 3 units have made me strive to achieve even higher standards within my work.

I confirm the evidence I have submitted to claim competence is authentic

Learner Signature:

Date:

**ASSESSOR SUMMATIVE STATEMENT FOR THE UNITS/AWARD TO BE CLAIMED**

A.N. Candidate has used a wide selection of work situations to show exactly how he works within his business environment, carried out his responsibilities at work and also how he ensures his own actions reduces risks to health and safety.

A.N. has carried out research prior to being assessed in terms of employment rights and responsibilities, this was an area where he highlighted more knowledge was needed. This has helped him in his work as he is now more aware of what he is legally able to do and he is now acting as a mentor to other colleagues in this area.

A.N. is the office H&S rep, so collecting evidence for this unit was not a problem and the evidence clearly demonstrates A.N.'s competence at ensuring all of his colleagues and his safety.

Throughout the period of assessment within the units completed, A.N. has shown his knowledge and competence and this is shown within assessor observation, discussions and witness testimony that accompanies his work product evidence and personal statements.

I am satisfied that evidence used clearly demonstrates the requirements for these 3 units fully, well done A.N.

I confirm the evidence I have assessed is authentic

Assessor Signature

Date:

Internal Verifier Signature

Date:





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## APPEALS PROCEDURE FOR LEARNERS

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If learners are dissatisfied with an assessment outcome, they have the right of appeal. There are three stages in the appeals procedure and each stage must be exhausted before proceeding to the next one. Learners are advised to keep their own copies of all the documents used in the appeals procedure.

The main reasons for an appeal are likely to be:

- learners do not understand why they are not yet regarded as competent, due to lack of or unclear feedback from the Assessor
- learners believe they are competent and that the Assessor has misjudged them, or has failed to utilise some vital evidence.

### STAGE 1

If learners receive a decision they are unsatisfied with, they have the right to appeal directly to the Assessor who carried out the assessment. The appeal must be in writing and clearly indicate:

- the points of disagreement
- the evidence in the portfolio that the learner believes meets the requirements for claiming competence.

### STAGE 2

Learners who are not satisfied with the outcome of their Stage 1 appeal can next appeal to the centre Internal Verifier. This appeal must be in writing, but need not repeat the detail provided at Stage 1 as all the documentation used at Stage 1 will be passed to the Internal Verifier.

### STAGE 3

Learners who are not satisfied with the outcome of their Stage 2 appeal and who have exhausted all centre appeals procedures may proceed to Stage 3. This appeal must be in writing to the EDI Compliance Manager, and must be accompanied by copies of all documentation from Stages 1 and 2. There must also be evidence that the learner has exhausted all the centre internal appeals procedures.

An investigation will be undertaken on behalf of EDI and the EDI appeals panel will compile a report for consideration. This consideration will lead to one of two decisions:

EITHER the appeal will either be upheld or rejected

OR the appeals panel will appoint an independent assessor and require the learner to re-submit their portfolio and be available for interview on an agreed date. The independent assessor will then report to the appeals panel. The appeal will either be rejected or upheld.

The decision of the appeals panel will be final.

## **FEE FOR APPEAL**

A fee is payable for an appeal. The current fee is listed in the Fee Sheet available from EDI Customer Service. The fee will be refunded if the appeal is upheld.

## **SUMMARY**

The appeals procedure aims to ensure the following:

- the operation of the appeals procedure, and results arising from it, are monitored to determine future policy
- all learners' complaints are acknowledged and investigated to establish the facts and evidence supporting the appeal. If a complaint is considered justified, remedial action will be taken
- all learners who register an appeal will receive a formal reply within eight weeks. It is intended that the response will be to the mutual satisfaction of the learner and EDI

The appeals procedure must be communicated/available in writing to all learners as well as the action they need to take to make use of it.

## **COMPOSITION OF THE APPEALS PANEL**

The appeals panel will comprise the chair and two other independent members of the Advisory Council for Education and Training, the Head of Product Development and the Compliance Manager.

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## KEY SKILLS SIGNPOSTING

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### What is signposting?

The signposting of Key Skills to the Customer Service units is intended to help assessors identify opportunities to:

- Develop Key Skills within the context of developing occupational competence
- Collect evidence of achievement of Key Skills along with evidence for the NVQ being assessed

### How are these Customer Service units signposted?

The two key skills of Communication and Application of Number are signposted at unit level. The following two tables have been provided by the Institute of Customer Service.

**CUSTOMER SERVICE NVQ  
LEVEL 2  
signposted to  
KEY SKILLS LEVEL 1**

**KEY SKILLS STATEMENTS**

- G** WILL PROBABLY provide dual assessment opportunities
- Y** MAY provide dual assessment opportunities
- R** IS UNLIKELY TO provide dual assessment opportunities

Interpret information	Carry out calculations	Interpret results and present findings	Discuss	Read and obtain information	Write documents
N	N	N	C	C	C
1.1	1.2	1.3	1.1	1.2	1.3

**UNIT TITLES**

**MANDATORY FOUNDATION UNITS**

1 Prepare yourself to deliver good customer service	Y	R	R	G	G	Y
5 Provide customer service within the rules	Y	R	R	G	G	Y

**THEME: IMPRESSION AND IMAGE**

9 Give customers a positive image of yourself and your organisation	Y	R	R	G	G	Y
10 Promote additional services or products to customers	Y	Y	Y	G	G	Y
11 Process customer service information	Y	Y	Y	Y	G	Y
12 Live up to the customer service promise	Y	Y	Y	G	G	Y
13 Make customer service personal	Y	R	R	G	G	Y
14 Go the extra mile in customer service	Y	R	R	G	G	Y
15 Deal with customers in writing or using ICT	Y	R	R	Y	G	G
16 Deal with customers face to face	Y	R	R	G	G	R
17 Deal with customers by telephone	Y	R	R	G	Y	R

**THEME: DELIVERY**

21 Deliver reliable customer service	Y	Y	Y	G	G	Y
22 Deliver customer service on your customers' premises	Y	Y	Y	Y	G	Y
23 Recognise diversity when delivering customer service	R	R	R	G	Y	R

**THEME: HANDLING PROBLEMS**

6 Recognise and deal with customer queries, requests and problems	Y	Y	Y	G	G	Y
31 Resolve customer service problems	Y	Y	Y	G	G	Y

**THEME: DEVELOPMENT AND IMPROVEMENT**

36 Develop customer relationships	Y	R	R	G	G	Y
37 Support customer service improvements	Y	Y	Y	G	Y	Y
38 Develop personal performance through delivering customer service	Y	Y	Y	Y	Y	Y





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## PROGRESSION BETWEEN CUSTOMER SERVICE LEVELS

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### UNITS IMPORTED FROM LEVEL 1 TO LEVEL 2

The following three units can be imported from the Customer Service NVQ level 1 into the Customer Service NVQ level 2:

<b>UNIT 1</b>	Prepare yourself to deliver good customer service
<b>UNIT 5</b>	Provide customer service within the rules
<b>UNIT 6</b>	Recognise and deal with customer queries, requests and problems

### UNITS IMPORTED FROM LEVEL 2 TO LEVEL 3

The following five units can be imported from the Customer Service NVQ level 2 into the Customer Service NVQ level 3. However, the maximum number of imports allowed is three units.

<b>UNIT 13</b>	Make customer service personal
<b>UNIT 14</b>	Go the extra mile in customer service
<b>UNIT 15</b>	Deal with customers in writing or using ICT
<b>UNIT 22</b>	Deliver customer service on your customers' premises
<b>UNIT 23</b>	Recognise diversity when delivering customer service

### UNITS IMPORTED FROM LEVEL 3 TO LEVEL 4

The following five units can be imported from the Customer Service NVQ level 3 into the Customer Service NVQ level 4.

<b>UNIT 7</b>	Understand customer service to improve service delivery
<b>UNIT 8</b>	Know the rules to follow when developing customer service
<b>UNIT 18</b>	Use customer service as a competitive tool
<b>UNIT 33</b>	Apply risk assessment to customer service
<b>UNIT 42</b>	Lead a team to improve customer service



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## **EDI Level 3 NVQ in Customer Service**

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The EDI Level 3 National Vocational Qualification (NVQ) in Customer Service offered by Education Development International (EDI) has been developed from the National Occupational Standards produced by the Institute of Customer Service.

The aim of this qualification is to contribute to the skills, knowledge and overall performance of the industry's workforce. It provides a first insight into the principles and processes of the delivery of customer service and will aid career progression.

The EDI Level 3 NVQ in Customer Service provides an up-to-date qualification that is in line with industry needs and presents an opportunity for individuals to progress within their present role, and future roles.

This NVQ is designed to enhance the skills, knowledge and experience of those people working in a service delivery role in a wide variety of organisations.

Within your job role you need to be able to show that you can carry out a range of work activities in a variety of contexts. Some of these activities will need to be complex or non-routine tasks that may be carried out when you work as part of a team. In addition you need to show that you can take responsibility for your own work and work by yourself when needed.



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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **STRUCTURE OF AWARD**

To achieve a full certificate in Customer Service, you are required to complete the 2 mandatory units and 6 optional units (at least one from each Theme).

### **MANDATORY UNITS**

#### **THEME: CUSTOMER SERVICE FOUNDATIONS**

This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you have to work.

**UNIT 7 NU5034** Understand customer service to improve service delivery

**UNIT 8 NU5035** Know the rules to follow when developing customer service

### **OPTIONAL UNITS**

#### **THEME: IMPRESSION AND IMAGE**

This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

**UNIT 13 NU5036** Make customer service personal

**UNIT 14 NU5037** Go the extra mile in customer service

**UNIT 15 NU5038** Deal with customers in writing or using ICT

**UNIT 18 NU5039** Use customer service as a competitive tool

**UNIT 19 NU5040** Organise the promotion of services or products to customers

#### **THEME: DELIVERY**

This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery.

**UNIT 22 NU5041** Deliver customer service on your customer's premises

**UNIT 23 NU5042** Recognise diversity when delivering customer service

**UNIT 24 NU5043** Deliver customer service using service partnerships

**UNIT 25 NU5044** Organise the delivery of reliable customer service

**UNIT 26 NU5045** Improve the customer relationship

## **THEME: HANDLING PROBLEMS**

This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

**UNIT 32 NU5046** Monitor and solve customer service problems

**UNIT 33 NU5047** Apply risk assessment to customer service

**UNIT 34 NU5048** Process customer service complaints

## **THEME: DEVELOPMENT AND IMPROVEMENT**

This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

**UNIT 39 NU5049** Work with others to improve customer service

**UNIT 40 NU5050** Promote continuous improvement in customer service

**UNIT 41 NU5051** Develop your own and others' customer service skills

**UNIT 42 NU5052** Lead a team to improve customer service

**UNIT 43 NU5053** Gather, analyse and interpret customer feedback

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **SUMMARY OF UNITS AND ELEMENTS**

<b>UNIT 7</b>	<b>UNDERSTAND CUSTOMER SERVICE TO IMPROVE SERVICE DELIVERY</b>
Element 7.1	Use accepted customer service language and apply its principles
Element 7.2	Place customer service principles in context for your professional customer service role
<b>UNIT 8</b>	<b>KNOW THE RULES TO FOLLOW WHEN DEVELOPING CUSTOMER SERVICE</b>
Element 8.1	Develop customer service following organisational rules and procedures
Element 8.2	Develop customer service following external regulation and legislation
<b>UNIT 13</b>	<b>MAKE CUSTOMER SERVICE PERSONAL</b>
Element 13.1	Identify opportunities for making customer service personal
Element 13.2	Treat your customer as an individual
<b>UNIT 14</b>	<b>GO THE EXTRA MILE IN CUSTOMER SERVICE</b>
Element 14.1	Distinguish between routine service standards and going the extra mile
Element 14.2	Check that your extra mile ideas are feasible
Element 14.3	Go the extra mile
<b>UNIT 15</b>	<b>DEAL WITH CUSTOMERS IN WRITING OR USING ICT</b>
Element 15.1	Use written or ICT communication effectively
Element 15.2	Plan and send an effective written or ICT communication
Element 15.3	Handle written or ICT communications effectively
<b>UNIT 18</b>	<b>USE CUSTOMER SERVICE AS A COMPETITIVE TOOL</b>
Element 18.1	Organise customer service to gain a competitive advantage
Element 18.2	Deliver a competitive service
<b>UNIT 19</b>	<b>ORGANISE THE PROMOTION OF SERVICES OR PRODUCTS TO CUSTOMERS</b>
Element 19.1	Offer additional services or products
Element 19.2	Organise support to promote use of additional services or products
Element 19.3	Monitor the promotion of additional services or products

<b>UNIT 22</b>	<b>DELIVER CUSTOMER SERVICE ON YOUR CUSTOMER'S PREMISES</b>
Element 22.1	Establish a rapport with your customer
Element 22.2	Balance customer service with your own skills and expertise
<b>UNIT 23</b>	<b>RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE</b>
Element 23.1	Use reasonable assumptions about your customer whilst avoiding stereotyping
Element 23.2	Adapt customer service to recognise the different needs and expectations of diverse groups of customers
<b>UNIT 24</b>	<b>DELIVER CUSTOMER SERVICE USING SERVICE PARTNERSHIPS</b>
Element 24.1	Work effectively within a customer service chain
Element 24.2	Build and nurture positive relationships in a customer service chain
<b>UNIT 25</b>	<b>ORGANISE THE DELIVERY OF RELIABLE CUSTOMER SERVICE</b>
Element 25.1	Plan and organise the delivery of reliable customer service
Element 25.2	Review and maintain customer service delivery
Element 25.3	Use recording systems to maintain reliable customer service
<b>UNIT 26</b>	<b>IMPROVE THE CUSTOMER RELATIONSHIP</b>
Element 26.1	Improve communication with your customers
Element 26.2	Balance the needs of your customer and your organisation
Element 26.3	Exceed customer expectations to develop the relationship
<b>UNIT 32</b>	<b>MONITOR AND SOLVE CUSTOMER SERVICE PROBLEMS</b>
Element 32.1	Solve immediate customer service problems
Element 32.2	Identify repeated customer service problems and options for solving them
Element 32.3	Take action to avoid the repetition of customer service problems
<b>UNIT 33</b>	<b>APPLY RISK ASSESSMENT TO CUSTOMER SERVICE</b>
Element 33.1	Analyse customer service processes for risk
Element 33.2	Assess customer service risks and take appropriate actions
<b>UNIT 34</b>	<b>PROCESS CUSTOMER SERVICE COMPLAINTS</b>
Element 34.1	Recognise the signs that a query or problem is about to produce a complaint
Element 34.2	Deal with a complaint effectively

## **UNIT 39**

### **WORK WITH OTHERS TO IMPROVE CUSTOMER SERVICE**

Element 39.1  
Element 39.2  
Element 39.3

Improve customer service by working with others  
Monitor your own performance when improving customer service  
Monitor joint performance when improving customer service

## **UNIT 40**

### **PROMOTE CONTINUOUS IMPROVEMENT IN CUSTOMER SERVICE**

Element 40.1  
Element 40.2  
Element 40.3

Plan improvements in customer service based on customer feedback  
Implement change in customer service  
Review changes to promote continuous improvement

## **UNIT 41**

### **DEVELOP YOUR OWN AND OTHERS' CUSTOMER SERVICE SKILLS**

Element 41.1  
Element 41.2  
Element 41.3

Develop your own customer service skills  
Plan the coaching of others in customer service  
Coach others in customer service

## **UNIT 42**

### **LEAD A TEAM TO IMPROVE CUSTOMER SERVICE**

Element 42.1  
Element 42.2  
Element 42.3

Plan and organise the work of a team  
Provide support for team members  
Review performance of team members

## **UNIT 43**

### **GATHER, ANALYSE AND INTERPRET CUSTOMER FEEDBACK**

Element 43.1  
Element 43.2  
Element 43.3

Plan to gather customer feedback  
Gather customer feedback  
Analyse and interpret customer feedback



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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 7**

### **UNDERSTAND CUSTOMER SERVICE TO IMPROVE SERVICE DELIVERY**

Element 7.1

Use accepted customer service language and apply its principles

Element 7.2

Place customer service principles in context for your professional customer service role



## **Unit Overview**

Industries and organisations have developed a language and approach for Customer Service that is recognised and understood as the basic principles for service excellence. It is essential for you to understand and apply this language and approach if you are to become a true Customer Service Professional.

This unit is all about being able to understand and explain the principles of customer service and the way they can be applied in specific customer service situations. The basic principles defined in this unit underpin all aspects of making customer service work and enable you to place professional customer practice in the context of your occupational sector and your own organisation.

### **Key words and phrases for this unit:**

- understand customer service language and concepts
- know customer service principles
- understand service offer
- understand service chain
- know meaning of added value
- know meaning of competitive advantage
- understand customer behaviour
- understand service partnerships

## Customer Service Standards

*When you understand customer service to improve service delivery you are able to:*

### ***Element 7.1 Use accepted customer service language and apply its principles***

- a explain how your organisation builds a service offer that will meet customer expectations
- b describe how the service offer is affected by financial and other resource limitations
- c describe what effects the service offer may have on the service chain
- d give examples of how customers may form their expectations of the services or products
- e explain the importance of effective teamwork and service partnerships for the delivery of excellent customer service
- f give examples of the similarities and differences in planning customer service offers for the commercial, public sector and private sector not-for-profit organisations
- g explain how customer service can provide added value to a public sector or private sector not-for profit organisation
- h explain how customer service can provide a competitive advantage for a commercial organisation
- i explain why your organisation must limit the level of customer service it gives in order to balance customer satisfaction with organisational goals
- j explain how your behaviour and the behaviour of customers can influence the level of customer satisfaction achieved
- k give positive examples of how you deal with different customer behaviours and personalities when managing problems and complaints
- l explain the importance of effective communication in the delivery of excellent customer service
- m give examples of how you ensure that communication with diverse groups of customers is effective and efficient
- n explain the significance of continuous improvement within customer service and the way that change and the management of change are central to ongoing customer satisfaction

### ***Element 7.2 Place customer service principles in context for your professional customer service role***

- a give examples of approaches different sectors may take to customer service
- b explain your organisation's policies and procedures for the delivery of services or products and why it is important to follow them
- c give examples of the service offer of competitors of your organisation or explain how your organisation's service offer is benchmarked if it is not in a competitive environment
- d give examples of the essential features and benefits of your organisation's services or products that influence customer service delivery and satisfaction
- e describe how your organisation balances its needs with customer expectations and needs
- f explain the ethical and values base of your organisation's approach to customer service

## **Knowledge and Understanding**

The knowledge and understanding relating to this unit are contained in the Customer Service Standards above.

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. Your evidence must show that you have carried out background work and given detailed consideration to the statements in this Unit before asking to be assessed. Where examples are requested, you should be able to give a range of examples to enable your assessor to be confident in your breadth of knowledge and competence in meeting the requirements of the Unit.
4. The evidence that you are competent to describe or explain the customer service principles contained in this Unit may be gathered through question and answer, either verbally or in writing, or it may be inferred by observation of your behaviour when delivering customer service.
5. Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, or any other method that makes your assessor confident that you have a good understanding of the language and concepts required for working in the field of customer service at this level.
6. Your knowledge of the customer service language and principles must be explained or described from the context of real work.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 8                      KNOW THE RULES TO FOLLOW WHEN DEVELOPING CUSTOMER SERVICE**

Element 8.1                      Develop customer service following organisational rules and procedures

Element 8.2                      Develop customer service following external regulation and legislation



## **Unit Overview**

The job of a customer service professional is to develop and improve customer service. However, this must be done within the framework of organisational procedures, regulation and legislation. Some of this framework applies only to your organisation, some applies to your industry sector and some is based on national regulation and legislation.

This unit is about what needs to be taken into account to ensure that developments and improvements take place within the rules.

### **Key words and phrases for this unit:**

- advanced knowledge of customer service
- advanced understanding of customer service
- understanding of policies and procedures
- understand how improvements are made
- know how developments take place
- know how to negotiate
- know and understand regulations
- know and understand legislation
- know and understand discrimination
- know and understand health and safety
- know and understand diversity

## **Customer Service Standards**

*When you know the rules to follow when developing customer service you are able to:*

### ***Element 8.1      Develop customer service following organisational rules and procedures***

- a      describe organisational policies and procedures that you would need to take into account to propose improvements or developments to customer service
- b      describe how you would obtain authorisation to change customer service practices
- c      explain the limits of your own authority and who else in the organisation would need to be involved if additional authority is needed for improvements or developments
- d      explain how you would involve colleagues or service partners in the implementation of improvements or changes

### ***Element 8.2      Develop customer service following external regulation and legislation***

- a      explain relevant regulation and legislation relating to consumer protection
- b      describe relevant regulation and legislation relating to data protection
- c      explain relevant regulation and legislation relating to disability discrimination and equal opportunities
- d      explain relevant regulation and legislation relating to diversity and inclusion and discrimination for reasons other than disability
- e      explain relevant regulation and legislation relating to health and safety of customers and colleagues
- f      explain the need to balance the requirements of regulation with the needs and objectives of your organisation
- g      describe how you would incorporate relevant regulation and legislation when planning and implementing improvements and developments

## **Knowledge and Understanding**

The knowledge and understanding relating to this unit are contained in the Customer Service Standards above.

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may base the evidence for the Unit through describing work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. Your evidence must show that you have carried out background work and given detailed consideration to the statements in this Unit before asking to be assessed. Where examples are requested, you should be able to give a range of examples to enable your assessor to be confident in your breadth of knowledge and competence in meeting the requirements of the Unit.
4. The evidence that you are competent to describe or explain the customer service rules and regulations contained in this Unit may be gathered through question and answer, either verbally or in writing, or it may be inferred by observation of your behaviour when delivering customer service.
5. Records of your evidence may be kept using any combination of methods such as documents, audio or video recording, notes of a conversation with your assessor, manager or mentor, or any other method that makes your assessor confident that you have a good understanding of the rules and regulations which need to be applied when working in the field of customer service at this level.
6. Your knowledge of the customer service rules and regulations must be explained or described from the context of real work.
7. Your evidence must include examples of rules that are based on:
  - a. legislation
  - b. sector or industry regulation
  - c. your organisation's policies.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 13                    MAKE CUSTOMER SERVICE PERSONAL**

Element 13.1 Identify opportunities for making customer service personal

Element 13.2 Treat your customer as an individual



## Unit Overview

Research has shown that customer satisfaction increases if your customer feels that they have been treated in a way that recognises their own personal needs. When you are delivering customer service you often deal with a large number of customers who seem to be the same, but it is important to remember that each customer is an individual. Anything you can do to make each customer feel that they have had your complete attention and have been dealt with personally increases their sense of satisfaction.

This unit is all about how you can help your customers feel that they have experienced service that focuses on them as an individual. When you work with a customer you need to give the impression that it is on a 'one to one' basis, that you care what happens to them and that you respect them as an individual.

### Key words and phrases for this unit:

- communicating
- feeling valued
- giving respect
- adding the personal touch
- working with customers with particular needs
- balancing time
- forming one-to-one relationships

## **Customer Service Standards**

*When you make customer service personal you must consistently:*

### ***Element 13.1 Identify opportunities for making customer service personal***

- a identify which of your organisation's systems or procedures allows you to add a personal touch to your service
- b use the cues and information that your customer gives to develop the personal service
- c let your customer know that you understand and that you are there to help
- d identify opportunities to help or direct your customer outside of normal routines and procedures
- e identify customers with particular needs who would especially appreciate personal service
- f balance the time you take when giving individual attention to one customer with the needs and expectations of other customers
- g make extra efforts to show how willing and able you are to give a more personal service

### ***Element 13.2 Treat your customer as an individual***

- a greet and deal with your customer in a way that respects them as an individual
- b focus your attention on the customer you are dealing with
- c always communicate with your customer in a friendly and open way
- d use your customer's name where it is known and appropriate
- e follow your organisation's guidelines about giving your customer your own name and contact details
- f concentrate on building a 'one to one' relationship with your customer by making them feel valued and respected

## Knowledge and Understanding

*To be competent at making customer service personal you need to know and understand:*

- A how use of your customer's name makes service more personal
- B personality types and their receptiveness to personalised services
- C types of personal information about customers that should and should not be kept on record
- D features of personal service that are most appreciated by customers with individual needs
- E body language and approaches to communication that are generally interpreted as open
- F your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
- G your own preferences and comfort levels relating to how you are willing and able to personalise service

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for the assessment of a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Levels 2,3 and 4 – January 2006*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of making customer service personal:
  - a. during routine delivery of customer service
  - b. during a busy period for your organisation
  - c. during a quiet period for your organisation
  - d. when people, systems or resources have let you down.
5. Your evidence must include examples of how you have dealt with customers who are:
  - a. happy with the service they are receiving
  - b. unhappy about the service they are receiving.
6. You must provide evidence that you have made customer service more personal:
  - a. when you have taken the initiative
  - b. in response to an opportunity presented when your customer has asked a question.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 14                    GO THE EXTRA MILE IN CUSTOMER SERVICE**

Element 14.1 Distinguish between routine service standards and going the extra mile

Element 14.2 Check that your extra mile ideas are feasible

Element 14.3 Go the extra mile



## Unit Overview

When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem.

Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations.

As customers, we all enjoy and remember it when somebody has "gone the extra mile" to deliver special customer service.

### Key words and phrases for this unit:

- the service offer
- explaining
- recognising needs and expectations
- adding value
- taking action
- checking action
- understanding own authority
- monitoring feedback
- passing on feedback

## **Customer Service Standards**

*When you go the extra mile in customer service you must consistently:*

### **Element 14.1      *Distinguish between routine service standards and going the extra mile***

- a    explain the service offer clearly and concisely
- b    identify your customer's expectations and needs
- c    match the service offer with your customer's expectations and needs and identify the key differences
- d    identify options for other actions that will give added value customer service and might impress your customer
- e    choose actions that are most appropriate to impress your customer

### **Element 14.2      *Check that your extra mile ideas are feasible***

- a    match your ideas for added value customer service against your authority to see them through
- b    check that your ideas for added value customer service are possible within your organisation's guidelines
- c    check that your ideas for added value customer service are possible within regulatory boundaries
- d    check that your ideas for added value customer service will not unreasonably affect the service to your other customers
- e    explain your ideas for added value service to a senior colleague or other appropriate authority if necessary

### **Element 14.3      *Go the extra mile***

- a    take the appropriate action to go the extra mile
- b    ensure that your customer is aware of the added value of your actions
- c    monitor the effects of your added value actions to ensure that the service given to your other customers is not affected unreasonably
- d    note and pass on positive feedback from your customer about your actions
- e    suggest that an extra mile action becomes routine if you have seen it work several times and it could be accommodated within the service offer

## Knowledge and Understanding

*To be competent at going the extra mile in customer service you need to know and understand:*

- A your organisation's service offer
- B how customers form expectations of the service they will receive
- C what types of service action most customers will see as adding value to the customer service they have already had
- D your organisation's rules and procedures that determine your authority to go the extra mile
- E relevant legislation and regulation that impact on your freedom to go the extra mile
- F how your organisation receives customer service feedback on the types of customer experience that has impressed them
- G your organisation's procedures for making changes in its service offer

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for the assessment of a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Levels 2,3 and 4 – January 2006*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of going the extra mile with customers:
  - a. during routine delivery of customer service
  - b. during a busy period for your organisation
  - c. during a quiet period for your organisation
  - d. when people, systems or resources have let you down.
5. Your evidence must show that you have:
  - a. followed organisational procedures to go the extra mile for customers
  - b. used your own initiative when going the extra mile for customers.
6. You must show that you have gone the extra mile for customers:
  - a. by acting within the limits of your own authority
  - b. by seeking appropriate authority for specific actions.
7. You must provide examples of when the benefits of going the extra mile enjoyed by customers are:
  - a. tangible in that they can be measured
  - b. intangible in that they are represented solely by feelings and perceptions of the customer experience.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 15**

### **DEAL WITH CUSTOMERS IN WRITING OR USING ICT**

Element 15.1 Use written or ICT communication effectively

Element 15.2 Plan and send an effective written or ICT communication

Element 15.3 Handle incoming written or ICT communication effectively



## **Unit Overview**

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or by using ICT. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone.

This unit is all about how written or ICT communication can be made effective and can contribute to excellent customer service.

### **Key words and phrases for this unit:**

- operating equipment
- managing time
- using clear and concise language
- recognising style and tone of language
- anticipate expectations
- establishing a rapport
- summarising key points
- identifying and choosing between options
- summarising outcomes

## **Customer Service Standards**

*When you are dealing with customers in writing or using ICT you must consistently:*

### ***Element 15.1 Use written or ICT communication effectively***

- a operate equipment used to communicate in writing or using ICT efficiently and effectively
- b ensure that the period of time between exchanges in writing or using ICT represents excellent customer service
- c use language that is clear and concise
- d adapt your use of language to meet the individual needs of your customer
- e ensure that the style and tone of your written or ICT communication follows your organisation's guidelines and matches the service offer

### ***Element 15.2 Plan and send an effective written or ICT communication***

- a anticipate your customer's expectations taking account of any previous exchanges you may have had
- b assemble all the information you need to construct the communication
- c plan the objective of your communication
- d format your communication following your organisation's guidelines
- e open the communication positively to establish a rapport with your customer
- f ensure that your customer is aware of the purpose of the communication as early as possible
- g summarise the key point of the communication and any actions that you or your customer will take as a result

### ***Element 15.3 Handle incoming written or ICT communications effectively***

- a read your customer's communication carefully to identify their precise reason for contacting you
- b identify what they are seeking as the outcome of the contact
- c identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- d choose the option that is most likely to lead to customer satisfaction within the service offer
- e summarise the outcome of the communication and any actions that you or your customer will take as a result

## Knowledge and Understanding

*To be competent at dealing with customers in writing or using ICT you need to know and understand:*

- A the importance of using clear and concise language
- B the additional significance and potential risks involved in committing a communication to a permanent record format
- C the effects of style and tone on the reader of a written or ICT communication
- D the importance of adapting your language to meet the needs of customers who may find the communication hard to understand
- E your organisation's guidelines and procedures relating to written communication and the use of ICT to communicate
- F how to operate equipment used for producing and sending written or ICT communications
- G the importance of keeping your customer informed if there is likely to be any delay in responding to a communication
- H the risks associated with the confidentiality of written or ICT communications

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for the assessment of a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Levels 2,3 and 4 – January 2006*)
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be in writing, by text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
5. Your evidence must include examples of dealing with customers who:
  - a. have routine expectations of your organisation's customer service
  - b. have experienced difficulties when dealing with your organisation
  - c. have made a specific request for information
  - d. need to be informed of circumstances of which they are unaware.
6. The style and tone of your communication must follow organisational guidelines and you must prove that you have taken account of:
  - a. your job role and position in your organisation
  - b. the personal style and preferences of your customer
  - c. the conventions of the medium of communication you are using.
7. Your evidence must include examples of:
  - a. individual communications with customers
  - b. group or circular communications with customers
  - c. group or circular communications that have been tailored to individuals or different categories of customer.
8. You must show that you have communicated with customers when:
  - a. you have initiated the contact
  - b. you are responding to a customer.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 18                    USE CUSTOMER SERVICE AS A COMPETITIVE TOOL**

Element 18.1 Organise customer service to gain a competitive advantage

Element 18.2 Deliver a competitive service



## Unit Overview

Customer service contributes to an organisation's competitive position. Customers of many organisations have some choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses.

This unit is all about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services and products.

### Key words and phrases for this unit:

- analysing the service offer
- comparing with competitors
- non-chargeable items
- adding value
- understanding financial implications
- repeat service
- complementary services
- customer satisfaction
- customer loyalty

## Customer Service Standards

*When you are using customer service as a competitive tool you must consistently:*

### ***Element 18.1 Organise customer service to gain a competitive advantage***

- a develop your own and colleagues' understanding of the services and products offered by your organisation
- b analyse your organisation's service offer and the ways in which it compares with those of your competitors
- c set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- d encourage customer service actions that create and develop customer loyalty

### ***Element 18.2 Deliver a competitive service***

- a take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- b remind your customers about your service offer and the extra benefit it provides over those of your competitors
- c offer additional technical advice to customers within your organisation's service offer
- d show awareness of the financial implications of any added value actions that you or your colleagues might offer
- e meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- f re-direct customers to other service providers without offence when their expectations cannot be met by your organisation's service offer
- g ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- h encourage colleagues to offer complementary services and products when customer satisfaction indicates that your customers would be interested in them

## Knowledge and Understanding

*To be competent in using customer service as a competitive tool you need to know and understand:*

- A the criteria and factors that lead to customers' belief that they are enjoying value for money
- B the services and products offered by your organisation
- C the services and products offered by competitors
- D features and benefits of services and products that are seen by customers as added value
- E the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- F how to portray a positive image that reinforces your organisation's competitive position
- G your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- H complementary services and products that may be of interest to your customers

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence of using customer service as a competitive tool:
  - a. during routine delivery of customer service
  - b. during a busy period for your organisation
  - c. during a quiet period for your organisation
  - d. when people, systems or resources have let you down.
5. You must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:
  - a. tangible in that they can be measured
  - b. intangible in that they are represented solely by feelings and perceptions of the customer experience.
6. Your evidence must include examples of competitive analysis involving:
  - a. direct competitors
  - b. competitors offering substitute services or products.
7. Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:
  - a. loyal customers
  - b. customers returning from competitors
  - c. new customers.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 19                    ORGANISE THE PROMOTION OF SERVICES OR PRODUCTS TO CUSTOMERS**

Element 19.1 Offer additional services or products

Element 19.2 Organise support to promote use of additional services or products

Element 19.3 Monitor the promotion of additional services or products



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**UNIT 19****ORGANISE THE PROMOTION OF SERVICES OR PRODUCTS TO CUSTOMERS**

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**Unit Overview**

This unit is about expanding and extending the relationship with your customers by persuading them to make use of additional services and products that you can offer.

Your services or products will remain viable only if they are used sufficiently by customers.

This Unit is about how you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively.

It is also about monitoring your successes and failures and recognising the best way to approach your customer with additional services or products for the future.

You need to show that you are promoting the services or products by encouraging more people to use them.

**Key words and phrases for this unit:**

- additional products
- additional services
- promoting
- planning
- organising
- monitoring

## **Customer Service Standards**

*When you organise and promote services or products to customers you must consistently:*

### ***Element 19.1 Offer additional services or products***

- a offer additional services or products to your customers
- b identify the benefits of offering additional services or products for your customers and the organisation
- c explain the features and benefits of additional services or products to your customers
- d identify ways of encouraging customers to ask about additional services or products

### ***Element 19.2 Organise support to promote use of additional services or products***

- a discuss with others ways of promoting additional services or products to your customers
- b implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- c promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
- d help customers to access services or products which are supplied outside of your own area of the organisation

### ***Element 19.3 Monitor the promotion of additional services or products***

- a devise methods to inform customers about additional services or products
- b use different methods to inform customers about additional services and products and record successes and failures against each method
- c use your record of successes and failures to identify the best approach for offering additional services or products
- d share information with others regarding the best approach to take when offering additional services or products to your customers

## Knowledge and Understanding

*To be competent at organising and promoting services or products to customers you need to know and understand:*

- A your organisation's procedures and systems for encouraging the use of additional services or products
- B how the use of additional services or products will benefit your customers
- C the main factors that influence customers to use your services or products
- D how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- E how to give appropriate, balanced information to your customers about services or products

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence for this Unit must prove that you:
  - a. use agreed organisational procedures and systems
  - b. create your own opportunities.
5. Your evidence must show that you have:
  - a. taken responsibility for your own actions in promoting services or products
  - b. used spontaneous customer feedback to identify opportunities for promoting services or products
  - c. used customer feedback that you have requested to identify opportunities for promoting services or products
6. Your evidence must include examples of:
  - a. returning customers extending their use of your services or products
  - b. new customers making use of your services or products.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 22**

### **DELIVER CUSTOMER SERVICE ON YOUR CUSTOMER'S PREMISES**

Element 22.1 Establish a rapport with your customer

Element 22.2 Balance customer service with your own skills and expertise



## Unit Overview

Many organisations deliver a service to their customers on the customer's own premises. This requires sensitive handling as people are particularly protective about their own personal space. In this situation there is always the potential to detract from excellent customer service by using inappropriate language or behaviour or even by causing accidental damage to your customer's property.

This unit is all about the process of providing a service on customer premises whilst ensuring that your customer both enjoys the customer service experience and has confidence that the work you have carried out has been completed successfully.

This unit also applies when you are delivering service to an internal customer in their own work area.

### Key words and phrases for this unit:

- customer's premises
- language
- behaviour
- keep customer informed
- give explanations
- consult with customer
- inform customer
- work professionally

## Customer Service Standards

*When you deliver customer service on your customer's premises you must consistently:*

### **Element 22.1      *Establish a rapport with your customer***

- a      prepare for a visit to your customer's premises and ensure they know when and why you will be there
- b      identify yourself to your customer showing official identification whenever possible
- c      show a positive and friendly approach to the service you are about to give
- d      use appropriate language and behaviour and show your customer respect at all times
- e      explain to your customer exactly what you are going to do and approximately how long you expect this to take
- f      listen to any concerns that your customer may have and acknowledge them
- g      keep your customer informed of progress and about any cause for delay that might take place
- h      keep your customer informed of any variation to the work that could involve additional time or cost
- i      consult your customer when you will have to do work that they had not expected

### **Element 22.2      *Balance customer service with your own skills and expertise***

- a      show respect to your customer's premises and possessions by treating them with care
- b      consider the customer service implications of each action and, when appropriate, inform your customer of what will be involved
- c      take the time to give your customer confidence in your knowledge and skills
- d      inform your customer when you have finished and reinforce how the work has been handled professionally
- e      check that your customer is satisfied with the work and listen carefully to any feedback
- f      inform your customer of timescales if any follow up work is involved
- g      ensure that timescales for follow up work are kept
- h      keep your customer informed if timescales for follow up work are not going to be met
- i      explain clearly to your customer why you cannot do work that is not specified in the service offer
- j      ensure that your customer has the appropriate details to contact your organisation if they need to

## **Knowledge and Understanding**

*To be competent at delivering customer service on the customer's premises you must know and understand:*

- A the importance of sensitivity to people's feelings about their own premises and possessions
- B the regulatory and legal restrictions on what you can and cannot do in all aspects of your work
- C the insurance implications of working on your customer's premises
- D the organisational procedures you would take if any accidental damage is incurred by you on your customer's premises

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.  
*(Guidelines for the assessment of a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Levels 2, 3 and 4 – January 2006)*
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you deliver excellent customer service:
  - a. during routine delivery of customer service
  - b. during a busy period for your organisation
  - c. during a quiet period for your organisation
  - d. when people, systems or resources have let you down.
5. You must provide evidence that you deliver excellent customer service during:
  - a. planned visits to your customer's premises
  - b. visits to your customer's premises made at short notice.
6. You must provide evidence that you deliver excellent customer service:
  - a. when your work goes to plan
  - b. when your work does not go to plan.
7. You must provide evidence that you deliver excellent customer service:
  - a. with your customer present
  - b. when your customer is not present.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 23**

### **RECOGNISE DIVERSITY WHEN DELIVERING CUSTOMER SERVICE**

Element 23.1 Use reasonable assumptions about your customer whilst avoiding stereotyping

Element 23.2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers



## **Unit Overview**

Many customer service situations involve dealing with diverse groups of people inclusively and with respect. Responses to diversity can lead to discrimination that might or might not be deliberate. Discrimination can result from simply not knowing the beliefs and preferences of different groups or may result from assumptions that are drawn from stereotypes rather than from solid evidence obtained from your customer.

This unit is all about how you establish your customer's expectations and needs in a way that takes full account of them as an individual. The unit also covers the way you provide customer service to diverse groups of customers each of which has common likes and dislikes.

### **Key words and phrases for unit:**

- verbal clues
- non-verbal clues
- stereotyping
- impression formation
- inclusive
- show respect
- vary approach
- work with colleagues

## Customer Service Standards

*When you recognise diversity while delivering customer service you must consistently:*

### ***Element 23.1 Use reasonable assumptions about your customer whilst avoiding stereotyping***

- a observe verbal and non-verbal clues that provide information about your customer's expectations and needs
- b identify reasonable assumptions you might make about your customer basing your judgement on your customer's appearance and their communication with you
- c test each assumption about your customer against your own beliefs about various categories of people that might include your customer
- d check your assumptions by questioning your customer to ensure that the impression you are forming is based on sound evidence from your customer
- e adjust your assumptions about your customer's expectations and needs as a result of further clues you have collected through talking with your customer
- f identify and avoid features of standard stereotypes that might be applied to your customer that could carry the risk of causing offence

### ***Element 23.2 Adapt customer service to recognise the different needs and expectations of diverse groups of customers***

- a follow organisational procedures and guidelines that seek to make customer service inclusive for diverse groups of customers
- b show respect for your customer's individual beliefs, expectations and needs that may result from their membership of a particular group
- c vary your approach to your customer to take account of their beliefs, expectations and needs that result from their membership of a particular group
- d work with colleagues to identify consistent approaches that team members should adopt when dealing with particular groups

## Knowledge and Understanding

*To be competent in recognising diversity when delivering customer service you must know and understand:*

- A the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- B reasons why consideration of diversity and inclusion issues affect customer service
- C organisational guidelines to make customer service inclusive for diverse groups of customers
- D legal use and meaning of the word 'reasonable'
- E how to observe and interpret non-verbal clues
- F how to listen actively for clues about your customer's expectations and needs
- G techniques for obtaining additional information from customers through tactful and respectful questions
- H behaviour that might cause offence to specific groups of people to whom you regularly provide customer service
- I how to impress specific groups of people to whom you regularly provide customer service

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.  
*(Guidelines for the assessment of a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQ Levels 2, 3 and 4 – January 2006)*
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have developed your approach to diversity taking account of:
  - a. relevant legislation
  - b. sector or industry codes of practice
  - c. the policies and procedures of your own organisation.
5. You must provide evidence that you have recognised diversity when delivering customer service to people from different groups in relation to at least four of these sources of diversity:
  - a. age
  - b. disability
  - c. national origin
  - d. sexual orientation
  - e. values
  - f. ethnic culture
  - g. education
  - h. lifestyle
  - i. beliefs
  - j. physical appearance
  - k. social class
  - l. economic status.
6. You must provide examples of situations when your analysis of your assumptions and your customer service delivery have led you to:
  - a. deliberately adopt different approaches to different groups of customers
  - b. deliberately adopt a consistent approach to groups of customers who you recognise as having diverse requirements.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 24**

### **DELIVER CUSTOMER SERVICE USING SERVICE PARTNERSHIPS**

Element 24.1 Work effectively within a customer service chain

Element 24.2 Build and nurture positive relationships in a customer service chain



## **Unit Overview**

Excellent customer service relies on teamwork. In many situations, successful delivery of service to external customers relies on a complete service chain of internal customers and internal or external suppliers. For this to work, a series of service partnerships must be formed which will enable the chain to work efficiently and effectively.

This unit is all about how to work effectively within a service chain and how to develop the links that cement key relationships. Effective communication and an understanding of the roles of different organisations, departments and individuals are central to this area of work.

### **Key words and phrases for this unit:**

- service partners
- teamworking
- internal customers
- internal suppliers
- service procedures
- supply chain
- service chain
- positive relationships
- improving service

## Customer Service Standards

*When you deliver customer service using service partnerships you must consistently:*

### **Element 24.1      *Work effectively within a customer service chain***

- a      explain how the way you work with individual service partners represents a supplier/customer relationship
- b      explain who is involved in the service chain that supplies your end user customers
- c      identify which of these is internal and external to your organisation
- d      use the principles and practices applied to external customers to deliver excellent customer service to internal customers
- e      work with internal customers and internal or external suppliers in the service chain to improve service to external customers
- f      communicate effectively with internal customers to ensure that they are aware of any aspects of your work that might affect them

### **Element 24.2 *Build and nurture positive relationships in a customer service chain***

- a      create a positive relationship between internal or external suppliers and customers by establishing rapport and showing understanding of everyone's roles in the service chain
- b      identify where power and authority exist within the service chain and agree on when and how they should be included
- c      negotiate with internal customers and internal or external suppliers to establish service procedures that are acceptable to all and contribute to excellent customer service
- d      develop positive relationships with an internal customer or supplier that are reflected in a service level agreement that makes a positive contribution to the relationship
- e      work with colleagues to develop and maintain awareness that a team within a service chain cannot work in isolation
- f      agree with service partners how your work will be prioritised if there is a conflict of interest between the demands of internal and external customers

## Knowledge and Understanding

*To be competent at delivering customer service using service partnerships you must know and understand:*

- A the types of responsibilities and rights that can be built into an internal customer/supplier relationship
- B the benefits and drawbacks of describing a relationship in a service chain as a supplier/customer relationship or a service partnership
- C how to establish priorities if internal customer demands conflict with external customer demands
- D how to maintain team identity whilst working constructively with other teams to deliver excellent customer service
- E how to negotiate successfully with internal customers or suppliers
- F the formal and informal structures of the organisation and how they can influence relationships

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must produce evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The service level agreement between service partners in your evidence may be formal or informal.
5. You must provide examples of working in a service partnership on occasions when:
  - a. the service partners are cooperative
  - b. the service partners are un-cooperative.
6. You must include evidence to show that you have worked in a service partnership with:
  - a. regular or long term suppliers
  - b. new suppliers.
7. Your evidence must show that you have negotiated agreements with service partners that are of benefit to:
  - a. your organisation
  - b. your service partner

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 25**

### **ORGANISE THE DELIVERY OF RELIABLE CUSTOMER SERVICE**

Element 25.1 Plan and organise the delivery of reliable customer service

Element 25.2 Review and maintain customer service delivery

Element 25.3 Use recording systems to maintain reliable customer service



## **Unit Overview**

This Unit is about how you deliver and maintain excellent customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take responsibility for the resources and systems you use which support the service that you give.

In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

### **Key words and phrases for this Unit:**

- plan delivery
- organise delivery
- maintain delivery
- customer expectations
- balance time
- respond appropriately
- take action
- reliability of service
- record information
- select information
- retrieve information
- supply information

## **Customer Service Standards**

*When you organise the delivery of reliable customer service you must consistently:*

### ***Element 25.1 Plan and organise the delivery of reliable customer service***

- a plan, prepare and organise everything you need to deliver a variety of services or products to different types of customers
- b organise what you do to ensure that you are consistently able to give prompt attention to your customers
- c reorganise your work to respond to unexpected additional workloads

### ***Element 25.2 Review and maintain customer service delivery***

- a maintain service delivery during very busy periods and unusually quiet periods and when systems, people or resources have let you down
- b consistently meet your customers' expectations
- c balance the time you take with your customers with the demands of other customers seeking your attention
- d respond appropriately to your customers when they make comments about the products or services you are offering
- e alert others to repeated comments made by your customers
- f take action to improve the reliability of your service based on customer comments
- g monitor whether the action you have taken has improved the service you give to your customers

### ***Element 25.3 Use recording systems to maintain reliable customer service***

- a record and store customer service information accurately following organisational guidelines
- b select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- c quickly locate information that will help solve a customer's query
- d supply accurate customer service information to others using the most appropriate method of communication

## Knowledge and Understanding

*To be competent at organising the delivery of reliable customer service you need to know and understand:*

- A organisational procedures for unexpected situations and your role within them
- B resource implications in times of staff sickness and holiday periods and your responsibility at these times
- C the importance of having reliable and fast information for your customers and your organisation
- D organisational procedures and systems for delivering customer service
- E how to identify useful customer feedback and how to decide which feedback should be acted on
- F how to communicate feedback from customers to others
- G organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- H legal and regulatory requirements regarding the storage of data

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You need to include evidence that proves you have dealt with a variety of customers including:
  - a. easy-going customers
  - b. demanding customers
  - c. returning customers
  - d. new customers.
5. Your evidence must show that you have:
  - a. taken responsibility for your own actions in the delivery of customer service
  - b. used spontaneous customer feedback to improve customer service
  - c. used customer feedback that you have requested to improve customer service
6. Your evidence must show that you have organised customer service during:
  - a. a busy period for your organisation
  - b. a quiet period for your organisation
7. The system you use for recording data can be manual or using ICT systems.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 26**

### **IMPROVE THE CUSTOMER RELATIONSHIP**

Element 26.1 Improve communication with your customers

Element 26.2 Balance the needs of your customer and your organisation

Element 26.3 Exceed customer expectations to develop the relationship



## Unit Overview

To improve relationships with your customers you will need to deliver consistent and reliable customer service. In addition, customers will need to feel that you genuinely want to give them high levels of service and that you will make every possible effort to meet or exceed their expectations. This will encourage loyalty from external customers or longer-term service partnerships with internal customers.

You need to be proactive in your dealings with your customers and to respond professionally in all situations. You will need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you will need to make extra efforts to delight your customers by giving higher levels of service than they expect.

### Key words and phrases for this unit:

- improve communication
- adapt communication
- recognise customers' feelings
- exceed expectations
- develop relationships
- balance needs
- costs and benefits
- negotiate

## **Customer Service Standards**

*When you improve the customer relationship you must consistently:*

### ***Element 26.1 Improve communication with your customers***

- a select and use the best method of communication to meet your customers' expectations
- b take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- c adapt your communication to respond to individual customers' feelings

### ***Element 26.2 Balance the needs of your customer and your organisation***

- a meet your customers' expectations within your organisation's service offer
- b explain the reasons to your customers sensitively and positively when their expectations cannot be met
- c identify alternative solutions for your customers either within or outside the organisation
- d identify the costs and benefits of these solutions to your organisation and to your customers
- e negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- f take action to satisfy your customers with the agreed solution

### ***Element 26.3 Exceed customer expectations to develop the relationship***

- a make extra efforts to improve your relationship with your customers
- b recognise opportunities to exceed your customers' expectations
- c take action to exceed your customers' expectations within the limits of your own authority
- d gain the help and support of others to exceed your customers' expectations

## Knowledge and Understanding

*To be competent at improving the customer relationship you must know and understand:*

- A how to make best use of the method of communication chosen for dealing with your customers
- B how to negotiate effectively with your customers
- C how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- D the importance of customer loyalty and/or improved internal customer relationships to your organisation

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of using:
  - a. organisational procedures
  - b. exceptions to standard practice that are legal and benefit your organisation.
5. You need to prove that you have dealt with customers who:
  - a. have different needs and expectations
  - b. appear angry or confused
  - c. behave unconventionally.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 32**

### **MONITOR AND SOLVE CUSTOMER SERVICE PROBLEMS**

Element 32.1 Solve immediate customer service problems

Element 32.2 Identify repeated customer service problems and options for solving them

Element 32.3 Take action to avoid the repetition of customer service problems



## **Unit Overview**

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them.

This Unit is all about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

### **Key words and phrases for this unit:**

- solve problems
- work with others
- keep customers informed
- repeated problems
- choose amongst options
- avoid problems
- inform
- monitor changes
- adjust changes

## **Customer Service Standards**

*When you monitor and solve customer service problems you must consistently:*

### ***Element 32.1 Solve immediate customer service problems***

- a respond positively to customer service problems following organisational guidelines
- b solve customer service problems when you have sufficient authority
- c work with others to solve customer service problems
- d keep customers informed of the actions being taken
- e check with customers that they are comfortable with the actions being taken
- f solve problems with service systems and procedures that might affect customers before they become aware of them
- g inform managers and colleagues of the steps taken to solve specific problems

### ***Element 32.2 Identify repeated customer service problems and options for solving them***

- a identify repeated customer service problems
- b identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- c work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

### ***Element 32.3 Take action to avoid the repetition of customer service problems***

- a obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- b action your agreed solution
- c keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- d monitor the changes you have made and adjust them if appropriate

## Knowledge and Understanding

*To be competent at monitoring and solving customer service problems you need to know and understand:*

- A organisational procedures and systems for dealing with customer service problems
- B organisational procedures and systems for identifying repeated customer service problems
- C how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- D how to negotiate with and reassure customers while their problems are being solved

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of problems which are:
  - a. brought to your attention by customers
  - b. are identified first by you and/or by a colleague.
5. The problems included in your evidence must include examples of a:
  - a. difference between customer expectations and what is offered by your organisation
  - b. problem resulting from a system or procedure failure
  - c. problem resulting from a shortage of resources or human error.
6. You must show that you have considered the options for solving problems from the point of view of:
  - a. your customer
  - b. the potential benefits to your organisation
  - c. the potential risks to your organisation.
7. You must provide evidence that you have made use of options that:
  - a. follow formal organisational procedures or guidelines
  - b. make agreed and authorised exceptions to usual practice.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 33      APPLY RISK ASSESSMENT TO CUSTOMER SERVICE**

Element 33.1 Analyse customer service processes for risk

Element 33.2 Assess customer service risks and take appropriate actions



## **Unit Overview**

This unit is all about how risk assessment can be used to reduce any risks involved in the provision of customer service. The provision of customer service can involve a range of risks. These may be financial, reputational or health and safety risks. Awareness of them alone is rarely enough so customer service sometimes involves identifying and assessing individual risks so that they can be classified and prioritised. This in turn enables you to take actions to minimise risks.

### **Key words and phrases for this unit:**

- risk assessment
- financial risks
- reputational risks
- health and safety risks
- classifying risks
- adapt procedures
- minimise risks

## **Customer Service Standards**

*When you apply risk assessment to customer service you must consistently:*

### ***Element 33.1 Analyse customer service processes for risk***

- a identify different steps and stages in the customer service process and the moments of truth that offer most opportunity to impress or to disappoint
- b identify the financial risks for each stage of the customer service process
- c identify the reputational risks for each stage of the customer service process
- d identify the health and safety risks for each stage of the customer service process
- e identify the risk of delivering sub-standard services or products for each stage of the customer service process
- f ensure that your customers are aware of any risks that might impact on them
- g develop staff awareness of the risks you have identified

### ***Element 33.2 Assess customer service risks and take appropriate actions***

- a assess the probability of each risk that you have identified
- b assess the consequence of each risk in terms of finance, reputation and health and safety
- c classify each risk as high, medium or low taking into account its probability and consequences
- d work with colleagues to identify any actions that might be taken to reduce risk
- e take appropriate actions to minimise the overall customer service risk profile by adapting procedures

## Knowledge and Understanding

*To be competent at applying risk assessment to customer service you need to know and understand:*

- A your organisation's customer service process and the moments of truth (those points in the customer service process that have most impact on the customer experience)
- B risk assessment techniques
- C how to evaluate risk according to probability of occurrence and consequences of occurrence
- D the nature of potential customer service risks including financial, reputational and health and safety risks
- E cost/benefit analysis
- F SWOT (Strengths, Weaknesses, Opportunities, Threats) and PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. The procedures you follow for risk assessment may be formal or informal and may or may not be written.
5. You must provide evidence that you have identified risks in your own area of responsibility:
  - a. through your everyday work
  - b. actively carrying out a risk assessment
  - c. through discussion with colleagues.
6. Your evidence must show that when carrying out a risk assessment you have:
  - a. listed each risk
  - b. identified the consequences of each risk
  - c. estimated the probability of each risk occurring
  - d. made a judgement about any action that is justified taking into account the consequences and probability of each risk.
7. You must provide evidence that you have worked with at least two of these groups of people to identify possible actions for managing risk:
  - a. team members or colleagues
  - b. suppliers or service partners
  - c. supervisors, team leaders or managers.
8. Your evidence must show that you have carried out risk assessments that have caused you to:
  - a. take action to manage the risk
  - b. decide that the level of risk is tolerable and take no action.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 34      PROCESS CUSTOMER SERVICE COMPLAINTS**

Element 34.1 Recognise the signs that a query or problem is about to produce a complaint

Element 34.2 Deal with a complaint effectively



## **Unit Overview**

In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered.

This unit is all about the process of handling complaints

### **Key words and phrases for this unit:**

- recognise a complaint
- dissatisfied customers
- choose between options
- assess risks
- report findings
- escalate complaints
- give feedback
- keep records

## Customer Service Standards

*When you process customer service complaints you must consistently:*

### ***Element 34.1 Recognise the signs that a query or problem is about to produce a complaint***

- a identify signs that a customer is becoming dissatisfied with the customer service of your organisation
- b take action to change the situation so that the query or problem does not result in a complaint
- c take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made

### ***Element 34.2 Deal with a complaint effectively***

- a ensure that you have a clear understanding of the nature and details of the complaint
- b investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- c identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation
- d assess the risks to your organisation of choosing each option
- e report the findings of your investigation to your customer and offer your chosen solution
- f escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so
- g give feedback to other colleagues involved which will help them avoid future complaints
- h keep clear records of the way the complaint has been handled to avoid later misunderstandings

## Knowledge and Understanding

*To be competent in processing customer service complaints you need to know and understand:*

- A how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
- B why dealing with complaints is an inevitable part of delivering customer service
- C organisational procedures for dealing with complaints
- D how to negotiate a solution with your customer that is acceptable to that customer and to the organisation
- E the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported
- F when to escalate a complaint by involving more senior members of the organisation or an independent third party
- G the implications of admitting liability for an error made by your organisation
- H how to spot and interpret signals that your customer may be considering making a complaint
- I techniques for handling conflict
- J the importance of dealing with a complaint promptly
- K why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
- L how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must prove that you have processed complaints that are seen by your organisation as:
  - a. justified
  - b. unjustified.
5. You must provide evidence of processing customer service complaints:
  - a. during routine delivery of customer service
  - b. during a busy period for your organisation
  - c. during a quiet period for your organisation
  - d. when people, systems or resources have let you down.
6. You need to prove that you have dealt with customers who:
  - a. have different needs and expectations
  - b. appear angry or confused
  - c. behave unconventionally.
7. You must provide evidence that you have processed complaints and taken full account of:
  - a. organisational procedures
  - b. sector or industry codes of practice
  - c. legislation.
8. Your evidence must include examples of complaints you have processed:
  - a. using your own authority
  - b. by referring them upwards in the organisation.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 39      WORK WITH OTHERS TO IMPROVE CUSTOMER SERVICE**

Element 39.1    Improve customer service by working with others

Element 39.2    Monitor your own performance when improving customer service

Element 39.3    Monitor joint performance when improving customer service



## **Unit Overview**

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders.

The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service.

This Unit is all about how you develop a relationship with others to improve your customer service performance.

### **Key words and phrases for this unit:**

- work with others
- improve customer service
- contribute ideas
- co-operate with others
- keep commitments
- monitor own performance
- monitor joint performance

## **Customer Service Standards**

*When you work with others to improve customer service you must consistently:*

### ***Element 39.1 Improve customer service by working with others***

- a contribute constructive ideas for improving customer service
- b identify what you have to do to improve customer service and confirm this with others
- c agree with others what they have to do to improve customer service
- d co-operate with others to improve customer service
- e keep your commitments made to others
- f make others aware of anything that may affect plans to improve customer service

### ***Element 39.2 Monitor your own performance when improving customer service***

- a discuss with others how what you do affects customer service performance
- b identify how the way you work with others contributes towards improving customer service

### ***Element 39.3 Monitor joint performance when improving customer service***

- a discuss with others how teamwork affects customer service performance
- b identify with others how customer service teamwork could be improved
- c take action with others to improve customer service performance

## Knowledge and Understanding

*To be competent at working with others to improve customer service you need to know and understand:*

- A who else is involved either directly or indirectly in the delivery of customer service
- B the roles and responsibilities of others in your organisation
- C the roles of others outside your organisation who have an impact on your services or products
- D what the goals or targets of your organisation are in relation to customer service and how these are set
- E how your organisation identifies improvements in customer service

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must include examples of agreeing customer service roles and responsibilities which are:
  - a. part of your own role
  - b. part of other people's roles.
5. You must provide evidence that you have worked with at least two of these groups of people:
  - a. team members or colleagues
  - b. suppliers or service partners
  - c. supervisors, team leaders or managers.
6. Your evidence must show that your work with others involves communication by at least two of these methods:
  - a. face to face
  - b. in writing
  - c. by telephone
  - d. using text messages
  - e. by e-mail
  - f. using the internet
  - g. using an intranet.

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### **UNIT 40      PROMOTE CONTINUOUS IMPROVEMENT IN CUSTOMER SERVICE**

Element 40.1 Plan improvements in customer service based on customer feedback

Element 40.2 Implement changes in customer service

Element 40.3 Review changes to promote continuous improvement



## Unit Overview

This unit covers the key competence of the customer service professional.

You must be dedicated to the continuous improvement of customer service and this involves organising changes in customer service over and over again.

You will need to identify potential changes, think through their consequences and make them work.

Above all, this Unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

### Key words and phrases for this unit:

- continuous improvement
- plan improvements
- gather feedback
- interpret feedback
- work with others
- identify changes
- negotiate changes
- implement changes
- monitor changes
- review changes
- summarise changes
- analyse changes
- further improvement

## **Customer Service Standards**

*When you promote continuous improvement you must consistently:*

### ***Element 40.1 Plan improvements in customer service based on customer feedback***

- a gather feedback from customers that will help to identify opportunities for customer service improvement
- b analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- c discuss with others the potential effects of any proposed changes for your customers and your organisation
- d negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

### ***Element 40.2 Implement changes in customer service***

- a organise the implementation of authorised changes
- b implement the changes following organisational guidelines
- c inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- d monitor early reactions to changes and make appropriate fine-tuning adjustments

### ***Element 40.3 Review changes to promote continuous improvement***

- a collect and record feedback on the effects of changes
- b analyse and interpret feedback and share your findings on the effects of changes with others
- c summarise the advantages and disadvantages of the changes
- d use your analysis and interpretation of changes to identify opportunities for further improvement
- e present these opportunities to somebody with sufficient authority to make them happen

## Knowledge and Understanding

*To be competent at promoting continuous improvement you need to know and understand:*

- A how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- B how customer experience is influenced by the way service is delivered
- C how to collect, analyse and present customer feedback
- D how to make a business case to others to bring about change in the products or services you offer

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You must provide evidence that you have organised changes over a period of time which have resulted in sustainable continuous improvement in customer service.
5. You must show that your proposals for improvements:
  - a. are based on planned and analysed customer feedback
  - b. take into account all relevant regulations
  - c. take into account the costs and benefits to the organisation.
6. You may carry out this work alone or with colleagues. However, you must prove that you have taken an active role in:
  - a. collecting and analysing feedback
  - b. proposing initiatives for change
  - c. implementing the change
  - d. evaluating and reviewing the change.
7. Your evidence must clearly show the part you have played in each step of the process.
8. The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 41      DEVELOP YOUR OWN AND OTHERS' CUSTOMER SERVICE SKILLS**

Element 41.1    Develop your own customer service skills

Element 41.2    Plan the coaching of others in customer service

Element 41.3    Coach others in customer service



## **Unit Overview**

This Unit is about taking responsibility for continuously developing your own customer service skills and passing those skills on to others. It is about helping yourself and others to learn and grow in your customer service roles.

You may not be a manager or a supervisor but you may be responsible for showing others how things work and what they need to do. For example a new member of staff may need an introduction to the products, services, systems or procedures of your organisation and you may be asked to show them. Or you may need to coach someone from another department who has been transferred.

Also, there may be the introduction of a new product, service, system or procedure that you are asked to learn about and present or demonstrate to others. This Unit will help you to put 'showing others' into a formal framework that will help them to learn and improve your own coaching skills.

The delivery of excellent customer service depends on your skills and the skills of those around you.

### **Key words and phrases for this unit:**

- improve personal skills
- draw up personal development plan
- carry out personal development activities
- obtain and act on feedback
- coach others
- plan activities for others
- check progress of colleagues
- give feedback to colleagues
- ensure ongoing support for colleagues

## **Customer Service Standards**

*When you develop your own and others' customer service skills you must consistently:*

### ***Element 41.1 Develop your own customer service skills***

- a agree with a manager or mentor the specific customer service skills you need in your customer service role
- b agree the actions you need to take to improve your customer service skills
- c draw up a personal development plan based on your agreed actions to improve your customer service skills
- d carry out your personal development activities and regularly review your progress
- e obtain feedback from your manager or mentor about your customer service performance and update your personal development plan

### ***Element 41.2 Plan the coaching of others in customer service***

- a identify and agree with colleagues specific customer service skills and knowledge they need in their customer service role
- b identify opportunities for colleagues to take actions to develop their customer service skills
- c plan and organise activities and coaching sessions for colleagues to help them develop their customer service skills

### ***Element 41.3 Coach others in customer service***

- a coach colleagues to develop specific and agreed customer service skills
- b give colleagues the opportunity to practise skills, apply knowledge and gain experience to develop customer service competence
- c regularly check the progress of colleagues and modify your coaching as appropriate
- d give regular feedback to colleagues about the progress they are making
- e explain clearly to colleagues how ongoing support will be provided

## Knowledge and Understanding

*To be competent at developing your own and others' customer service skills you need to know and understand:*

- A organisational systems and procedures for developing your own and others' personal performance in customer service
- B how your behaviour impacts on others
- C how to review effectively your personal strengths and development needs
- D how to put together a personal development plan for yourself or a colleague that will build on strengths and overcome weaknesses in areas that are important to customer service
- E how to obtain useful and constructive personal feedback from others
- F how to respond positively to personal feedback
- G how to put together a coaching plan that will build on the strengths of the learner and overcome their weaknesses in areas that are important to customer service and their job role
- H how to give useful and constructive personal feedback to others
- I how to help others to respond positively to personal feedback

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
4. Your personal development plan may be based on existing customer service skills and development activities that already take place in your organisation or new activities that you have to devise for this Unit.
5. You must have constructed your personal development plan taking account of information about the knowledge and skills relevant to your:
  - a. customer service role
  - b. own preferred method of learning
  - c. workload
  - d. opportunities for learning on the job
  - e. opportunities for learning off the job.
6. An 'appropriate person' must be your manager, your supervisor or team leader, a colleague detailed to help you learn, your assessor, your mentor or someone from your training or personnel department.
7. Feedback about your customer service performance must involve your line manager or supervisor and your evidence must show this.
8. Your evidence of coaching may relate to a single colleague or several colleagues who may be new to the organisation, new to the department or new to the job, procedure, or system.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 42      LEAD A TEAM TO IMPROVE CUSTOMER SERVICE**

Element 42.1 Plan and organise the work of a team

Element 42.2 Provide support for team members

Element 42.3 Review performance of team members



## **Unit Overview**

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance. This Unit is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

### **Key words and phrases for this unit:**

- plan team work
- organise team work
- lead a team
- allocate work
- motivate team members
- provide support
- check understanding
- review team performance
- provide feedback
- review individual performance

## **Customer Service Standards**

*When you lead a team to improve customer service you must consistently:*

### ***Element 42.1 Plan and organise the work of a team***

- a treat team members with respect at all times
- b agree with team members their role in delivering effective customer service
- c involve team members in planning and organising their customer service work
- d allocate work which takes full account of team members' customer service skills and the objectives of the organisation
- e motivate team members to work together to raise their customer service performance

### ***Element 42.2 Provide support for team members***

- a give team members support and direction when they need help
- b encourage team members to work together to improve customer service
- c check that team members understand what they have to do to improve their work with customers and why that is important
- d check with team members what support they feel they may need throughout this process

### ***Element 42.3 Review performance of team members***

- a provide sensitive feedback to team members about their customer service performance
- b encourage team members to discuss their customer service performance
- c discuss sensitively with team members action they need to take to continue to improve their customer service performance

## Knowledge and Understanding

*To be competent at leading a team to improve customer service you need to know and understand:*

- A the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- B how team and individual performance can affect the achievement of organisational objectives
- C the implications of failure to improve customer service for your team members and your organisation
- D how to plan work activities
- E how to present plans to others to gain understanding and commitment
- F how to facilitate meetings to encourage frank and open discussion
- G how to involve and motivate staff to encourage teamwork
- H how to recognise and deal sensitively with issues of underperformance

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.
4. You must prove you have line management or supervisory responsibility for the team members used in your evidence.
5. You must show that you have taken into account the organisational constraints of:
  - a. cost
  - b. time
  - c. human resources
  - d. other resources.
6. You must also show that you have taken into account the team or individual constraints of:
  - a. existing workloads
  - b. individual capabilities and sensitivities
  - c. initiatives and objectives currently being undertaken by the organisation
  - d. influences operating on the team from outside.
7. Your evidence must prove that you have taken time with each team member to:
  - a. plan and organise their work
  - b. provide support and guidance
  - c. give and seek feedback on performance.

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## **EDI LEVEL 3 NVQ IN CUSTOMER SERVICE**

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### **UNIT 43      GATHER, ANALYSE AND INTERPRET CUSTOMER FEEDBACK**

Element 43.1 Plan to gather customer feedback

Element 43.2 Gather customer feedback

Element 43.3 Analyse and interpret customer feedback



## **Unit Overview**

Customer service can be improved only if you are fully aware of customer wishes and expectations. You can discover much of this information by seeking structured feedback from your customers about their experiences of your existing services or products.

When the information has been collected it must be analysed and interpreted in order to use it for making customer service improvements. This unit is all about how you collect that feedback and prepare it for use in the improvement of customer service.

### **Key words and phrases for this unit:**

- gather feedback
- evaluate costs and benefits
- select amongst feedback methods
- gather customer feedback
- record data
- analyse data
- interpret data
- make recommendations

## **Customer Service Standards**

*When you gather customer feedback you must consistently:*

### ***Element 43.1 Plan to gather customer feedback***

- a identify the options available for collecting customer service feedback
- b evaluate the costs and benefits of each option for collecting customer feedback
- c select one or more methods for collecting customer feedback
- d plan in detail what information you will collect from customers
- e ensure the information you collect is centred around customer service
- f plan in detail how you will collect information from customers using your chosen method

### ***Element 43.2 Gather customer feedback***

- a use your chosen method and detailed plan to collect customer feedback
- b monitor the collection of customer feedback to ensure it is falling within your chosen sampling frame
- c monitor the collection of customer feedback to ensure it focuses on customer service issues
- d record the data you collect in a way that makes analysis and interpretation easy
- e respect your customers' rights to confidentiality if they do not want their comments to be identified

### ***Element 43.3 Analyse and interpret customer feedback***

- a collate data collected from customers in order to identify patterns and trends in customer service
- b perform appropriate calculations to summarise patterns and trends in the data
- c present your analysis in a form that is easily understood
- d link your analysis with your knowledge of your organisation's service offer and customer service processes in order to interpret the meaning of the data
- e make recommendations for changes in your organisation's service offer or customer service processes in response to the views of your customers
- f identify ways in which customer feedback can be used to inform customers and develop the customer relationship

## Knowledge and Understanding

*To be competent at gathering, analysing and interpreting customer feedback you need to know and understand:*

- A random sampling techniques and how to evaluate bias in non-random samples
- B principles of questionnaire design
- C principles of effective interviewing
- D how to calculate the cost of a customer survey
- E techniques for monitoring data collection
- F how to use appropriate software to record and analyse customer feedback
- G methods of displaying and presenting data in a way that is easy to understand
- H statistical techniques for summarising trends and patterns
- I organisational procedures for recommending changes in the service offer or customer service procedures
- J the advantages and disadvantages of collecting customer feedback through written questionnaires, by telephone, by interview, using focus groups or by internet or e-mail

## Evidence Requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your evidence must show that you have collected feedback from customers:
  - a. using informal methods such as conversation and observation of customer reactions
  - b. using at least two different formal methods such as questionnaire, telephone or interview surveys.
5. Your evidence must include examples of feedback that you have collected:
  - a. using a method you have devised
  - b. following established organisational procedures.
6. You must provide evidence that you have displayed the results of your data collection:
  - a. in tabulated form
  - b. in graphical or pictorial form.



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