



## **Level 4 NVQ Diploma in Customer Service**

### **Qualification Specification**

# Contents

|   | <b>Page</b> |
|---|-------------|
| Introduction                              | 3           |
| Qualification profile                     | 3           |
| Qualification structure                   | 4           |
| Centre requirements                       | 6           |
| Support for candidates                    | 6           |
| Assessment                                | 6           |
| Internal quality assurance                | 7           |
| Adjustments to assessment                 | 7           |
| Results enquiries and appeals             | 7           |
| Certification                             | 8           |
| Learning outcomes and assessment criteria | 9           |

## Introduction

The Level 4 NVQ Diploma in Customer Service qualification provides nationally recognised qualifications for anyone wishing to develop and implement customer-service strategies for their team, department or organisation.

The awarding body for this qualification is ProQual Awarding Body and the regulatory body is the Office of Qualifications and Examinations Regulation (Ofqual). The specification for this qualification has been approved by the Welsh Government for use by centres in Wales and by the Council for the Curriculum Examinations and Assessment (CCEA) for use by centres in Northern Ireland.

The qualification has been accredited onto the Regulated Qualifications Framework (RQF); it provides a progression route to higher level or discipline related qualifications.

## Qualification Profile

### Level 4 NVQ Diploma in Customer Service

|                             |   |
|-----------------------------|---|
| Qualification title         | <b>ProQual Level 4 NVQ Diploma in Customer Service</b>  |
| Ofqual qualification number | 601/4756/8  |
| Level                       | 4   |
| Total qualification time    | 500 hours   |
| Guided learning hours       | 178   |
| Assessment                  | Pass or fail<br>Internally assessed and verified by centre staff<br>External quality assurance by ProQual verifiers |
| Qualification start date    | 1/11/2014   |
| Qualification end date      |   |

## Entry Requirements

There are no formal entry requirements for this qualification.

Centres should carry out an **initial assessment** of candidate skills and knowledge to identify any gaps and help plan the assessment.

## Qualification Structure

Candidates must achieve a minimum of 50 credits:

- 14 credits from the mandatory units, plus
- a minimum of 20 credits from the Optional Group B

A maximum of 16 credits can be from Optional Group C. A minimum of 38 credits must be at Level 4.

| <b>Group A Mandatory Units – complete all units</b>     |   |                   |                     |
|---|---|-------------------|---------------------|
| <b>Unit Reference Number</b>                            | <b>Unit Title</b>   | <b>Unit Level</b> | <b>Credit Value</b> |
| D/506/2153  | Champion customer service   | 4                 | 4                   |
| T/506/2952  | Manage personal and professional development                          | 3                 | 3                   |
| M/506/2898  | Manage customer service operations                                    | 4                 | 7                   |
| <b>Group B Optional Units – a minimum of 20 credits</b> |   |                   |                     |
| <b>Unit Reference Number</b>                            | <b>Unit Title</b>   | <b>Unit Level</b> | <b>Credit Value</b> |
| F/506/2176  | Review the quality of customer service                                | 4                 | 4                   |
| R/506/2179  | Build and maintain effective customer relations                       | 4                 | 6                   |
| L/506/2181  | Manage a customer service award programme                             | 4                 | 4                   |
| Y/506/2183  | Manage the use of technology to improve customer service              | 4                 | 4                   |
| Y/506/2166  | Develop resources to support consistency of customer service delivery | 3                 | 5                   |
| D/506/2167  | Use service partnerships to deliver customer service                  | 3                 | 3                   |
| K/506/2169  | Resolve customers' problems   | 3                 | 4                   |
| R/506/2151  | Resolve customers' complaints   | 3                 | 4                   |
| D/506/2170  | Gather, analyse and interpret customer feedback                       | 3                 | 5                   |
| K/506/2172  | Monitor the quality of customer service interactions                  | 3                 | 5                   |
| R/506/2960  | Develop a customer service strategy                                   | 4                 | 6                   |
| D/506/2962  | Develop a social media strategy for customer service                  | 4                 | 5                   |
| H/506/2963  | Develop customer service through social media                         | 4                 | 5                   |
| <b>Group C Optional Units – a maximum of 16 credits</b> |   |                   |                     |
| <b>Unit Reference Number</b>                            | <b>Unit Title</b>   | <b>Unit Level</b> | <b>Credit Value</b> |
| M/506/1962  | Encourage learning and development                                    | 4                 | 3                   |
| T/506/1980  | Initiate and implement operational change                             | 4                 | 4                   |
| R/506/1999  | Manage a project  | 4                 | 7                   |
| L/506/2004  | Manage business risk  | 4                 | 6                   |
| R/506/1954  | Support environmental sustainability in a business environment        | 4                 | 4                   |
| D/504/4056  | Manage Health and Safety in own area of responsibility                | 4                 | 5                   |
| H/503/0417  | Manage incident management systems in a contact centre                | 4                 | 6                   |
| T/506/1820  | Promote equality, diversity and inclusion in the workplace            | 3                 | 3                   |
| A/506/1821  | Manage team performance   | 3                 | 4                   |

| <b>Unit Reference Number</b> | <b>Unit Title</b>                                  | <b>Unit Level</b> | <b>Credit Value</b> |
|------------------------------|--|-------------------|---------------------|
| J/506/1921                   | Manage individuals' performance                    | 3                 | 4                   |
| F/502/8612                   | Negotiating, handling objections and closing sales | 3                 | 4                   |
| R/502/8615                   | Obtaining and analysing sales-related information  | 3                 | 4                   |
| K/502/8622                   | Buyer behaviour in sales situations                | 3                 | 3                   |
| K/503/0418                   | Manage incidents referred to a contact centre      | 3                 | 6                   |
| D/506/2055                   | Design business processes                          | 5                 | 5                   |
| Y/503/0401                   | Manage direct sales operations in a contact centre | 5                 | 7                   |
| J/502/4397                   | Bespoke software                                   | 3                 | 4                   |
| J/506/2292                   | Encourage innovation                               | 3                 | 4                   |

## Centre Requirements

Centres must be approved to offer this qualification. If your centre is not approved please complete and submit form **ProQual Additional Qualification Approval Application**.

### Staff

Staff delivering this qualification must be appropriately qualified and/or occupationally competent.

### Assessors/Internal Quality Assurance

For each competence-based unit centres must be able to provide at least one assessor and one internal quality assurance verifier who are suitably qualified for the specific occupational area. Assessors and internal quality assurance verifiers for competence-based units or qualifications will normally need to hold appropriate assessor or verifier qualifications, such as:

- Award in Assessing Competence in the Work Environment
- Award in Assessing Vocationally Related Achievement
- Certificate in Assessing Vocational Achievement
- Award in the Internal Quality Assurance of Assessment Processes and Practices
- Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practices

## Support for Candidates

Materials produced by centres to support candidates should:

- enable them to track their achievements as they progress through the learning outcomes and assessment criteria;
- provide information on where ProQual's policies and procedures can be viewed;
- provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence

## Assessment

This suite of qualifications are competence-based, candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

The qualifications must be assessed by an appropriately experienced and qualified assessor.

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

- Evidence can include:
- observation report by assessor
  - assignments/projects/reports
  - professional discussion
  - witness testimony
  - candidate product
  - worksheets
  - record of oral and written questioning
  - Recognition of Prior Learning

**Learning outcomes** set out what a candidate is expected to know, understand or be able to do.

**Assessment criteria** specify the standard a candidate must meet to show the learning outcome has been achieved.

*Learning outcomes and assessment criteria can be found from page 9.*

## Internal Quality Assurance

An internal quality assurance verifier confirms that assessment decisions made in centres are made by competent and qualified assessors, that they are the result of sound and fair assessment practice and that they are recorded accurately and appropriately.

## Adjustments to Assessment

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

## Results Enquiries and Appeals

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

## Certification

Candidates who achieve the required credits for qualifications will be awarded:

- A certificate listing all units achieved with their related credit value, and
- A certificate giving the full qualification title -

### **ProQual Level 4 NVQ Diploma in Customer Service**

#### **Claiming certificates**

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the required number of credits for a qualification. All certificates will be issued to the centre for successful candidates.

#### **Unit certificates**

If a candidate does not achieve all of the units/credits required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units/credits achieved.

#### **Replacement certificates**

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement certificates.



# Learning Outcomes and Assessment Criteria

## Unit D/506/2153

### Champion customer service

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:   |
|---|---|
| <p>1 Understand how to champion customer service</p>                        | <p>1.1 Evaluate the importance of viewing operations from the customer’s viewpoint</p> <p>1.2 Analyse the role of service partners in providing customer service</p> <p>1.3 Evaluate the effectiveness of information collection systems and reports</p> <p>1.4 Describe organisational decision-making processes and limits of their own authority</p> <p>1.5 Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements</p> <p>1.6 Describe activities that give added value to the service chain</p> |
| <p>2 Be able to identify the scope for improvements to customer service</p> | <p>2.1 Monitor customer service delivery to identify issues that are important to customer service</p> <p>2.2 Analyse the implications of improvements to customer service</p> <p>2.3 Identify customer service issues relating to new products and/or services</p> <p>2.4 Identify the strategic and managerial implications of changes to customer service and the service offer</p>  |
| <p>3 Be able to champion customer service</p>                               | <p>3.1 Promote the role of customer service within an organisation’s operational plans</p> <p>3.2 Inform individual staff members about their role in championing customer service</p> <p>3.3 Promote the benefits of effective customer service</p>  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 3.4 Provide validated customer service advice and information to colleagues
- 3.5 Support others to identify areas for improvement to customer service
- 3.6 Monitor the effectiveness of advice and information given
- 3.7 Take actions to ensure that customer service delivery meets agreed standards

## Unit T/506/2952

### Manage personal and professional development

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:   |
|---|---|
| 1 Be able to identify personal and professional development requirements            | 1.1 Compare sources of information on professional development trends and their validity<br>1.2 Identify trends and developments that influence the need for professional development<br>1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation  |
| 2 Be able to fulfil a personal and professional development plan                    | 2.1 Evaluate the benefits of personal and professional development<br>2.2 Explain the basis on which types of development actions are selected<br>2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis<br>2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives<br>2.5 Execute the plan within the agreed budget and timescale<br>2.6 Take advantage of development opportunities made available by professional networks or professional bodies |
| 3 Be able to maintain the relevance of a personal and professional development plan | 3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives<br>3.2 Obtain feedback on performance from a range of valid sources<br>3.3 Review progress toward personal and professional objectives   |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 3.4 Amend the personal and professional development plan in the light of feedback received from others

## Unit M/506/2898

### Manage customer service operations

| Learning Outcome - The learner will: |  | Assessment Criterion - The learner can: |  |
|--------------------------------------|--|---|--|
| 1                                    | Understand the management of customer service operations | 1.1                                     | Explain the basis for allocating resources   |
|                                      |  | 1.2                                     | Assess the suitability of a range of methods to monitor customer service operations                                  |
|                                      |  | 1.3                                     | Explain the strategies needed to deliver seamless customer service   |
|                                      |  | 1.4                                     | Explain techniques used to develop solutions to problems   |
|                                      |  | 1.5                                     | Evaluate sources of information on customer performance data   |
|                                      |  | 1.6                                     | Analyse a range of techniques to identify patterns and trends in customer behaviour and customer service performance |
|                                      |  | 1.7                                     | Analyse a range of possible improvements to customer service operations  |
| 2                                    | Be able to plan customer service operations              | 2.1                                     | Define the service offer to meet identified customer expectations  |
|                                      |  | 2.2                                     | Develop plans that will enable sustainable and consistent customer service operations to agreed standards            |
|                                      |  | 2.3                                     | Develop contingencies that address identified risks  |
|                                      |  | 2.4                                     | Specify targets, objectives, key performance indicators (KPIs) and monitoring arrangements                           |
|                                      |  | 2.5                                     | Communicate objectives, targets, standards and procedures to staff   |
| 3                                    | Be able to manage customer service operations            | 3.1                                     | Allocate resources according to agreed priorities  |
|                                      |  | 3.2                                     | Keep staff informed of developments in the customer service offer  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- |   |     |  |
|---|-----|--|
|   | 3.3 | Keep staff informed of developments in best practice for the delivery of customer service                                |
|   | 3.4 | Maintain positive working relationships amongst staff  |
|   | 3.5 | Carry out monitoring activities in accordance with plans   |
|   | 3.6 | Manage deviations from expected performance and service failures in accordance with contingency plans                    |
|   | 3.7 | Use feedback from staff and customers to make improvements   |
|   | 3.8 | Take action within the limits of their responsibility to make improvements to customer service performance               |
| 4 |     | Be able to prepare staff for the delivery of customer service  |
|   | 4.1 | Confirm that staff understand the vision, objectives, roles, plans, standards and procedures to deliver customer service |
|   | 4.2 | Provide training and support that will enable staff to deliver customer service to the required standards                |
|   | 4.3 | Communicate to staff their roles, responsibilities and work plans in line with delivery plans                            |
| 5 |     | Be able to measure customer service performance  |
|   | 5.1 | Take action to ensure that systems to collect agreed performance data are in place                                       |
|   | 5.2 | Identify trends of customer behaviour and customer service performance from performance data                             |
|   | 5.3 | Benchmark performance against agreed measures  |
|   | 5.4 | Address identified anomalies and problems  |
|   | 5.5 | Identify areas for improvement within customer service   |

## Unit F/506/2176

### Review the quality of customer service

| Learning Outcome - The learner will:                       | Assessment Criterion - The learner can:   |
|--|---|
| 1 Understand how to review the quality of customer service | 1.1 Explain the value of measuring the quality of customer service<br>1.2 Analyse the criteria for and factors involved in setting customer service standards<br>1.3 Explain how to construct representative samples<br>1.4 Analyse methods of validating information and information sources<br>1.5 Explain how to set and use customer service performance metrics<br>1.6 Explain the use of customer feedback in the measurement of customer service<br>1.7 Analyse the advantages and disadvantages of a range of data analysis methods |
| 2 Be able to plan the measurement of customer service      | 2.1 Identify the features of customer service against which customer satisfaction can be measured<br>2.2 Select data collection methods that are valid and reliable<br>2.3 Specify monitoring techniques that measure customer satisfaction<br>2.4 Establish evaluation objectives and key performance indicators (KPIs) in the measurement of customer service<br>2.5 Specify the information to be collected  |
| 3 Be able to evaluate the quality of customer service      | 3.1 Validate the information collected to identify useable data<br>3.2 Use information analysis methods that are appropriate to the nature of the information collected   |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 3.3 Identify instances of effective customer service, shortfalls and gaps from the information analysis against agreed criteria
- 3.4 Develop recommendations that address identified areas for improvement supported by evidence



## Unit R/506/2179

### Build and maintain effective customer relations

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| 1 Understand how to build effective relationships with customers                     | 1.1 Analyse stakeholder mapping techniques  |
|  | 1.2 Analyse the features of influencing techniques  |
|  | 1.3 Explain how influencing techniques can be used to improve the relationship with customers         |
|  | 1.4 Evaluate the benefits and value of relationships with customers and customer loyalty              |
|  | 1.5 Explain how techniques to manage expectations are applied to the management of customers          |
|  | 1.6 Explain different types of acceptable compromise  |
|  | 1.7 Evaluate the benefits of adopting a “customer-centred” approach                                   |
| 2 Be able to determine the scope for building effective relationships with customers | 2.1 Identify the customers with whom relationships should be developed                                |
|  | 2.2 Identify the interests and concerns of customers with whom relationships should be developed      |
|  | 2.3 Evaluate the scope for and limitations of building relationships with different types of customer |
| 3 Be able to develop effective relationships with customers                          | 3.1 Behave in a way that creates mutual trust and respect   |
|  | 3.2 Provide information and perform actions within agreed timescales                                  |
|  | 3.3 Take account of feedback provided by customers  |

**Learning Outcome - The learner will:****Assessment Criterion - The learner can:**

|   |     |   |
|---|-----|---|
|   | 3.4 | Keep customers up to date with new products and/or services and developments                                |
|   | 3.5 | Assess regularly the extent to which customers' expectations are met  |
|   | 3.6 | Use personal influence and authority to ensure that customer needs are met or exceeded                      |
| 4 |     | Be able to review and improve relationships with customers  |
|   | 4.1 | Monitor customer relationships and developments   |
|   | 4.2 | Take action to ensure that others complete agreed actions within agreed timescales                          |
|   | 4.3 | Address changes to customer service methods that may have an effect on customer relationships               |
|   | 4.4 | Collect feedback from customers on their levels of satisfaction   |
|   | 4.5 | Recommend improvements to customer service based on analyses of the effectiveness of customer relationships |

## Unit L/506/2181

### Manage a customer service award programme

| Learning Outcome - The learner will: |   | Assessment Criterion - The learner can: |  |
|--------------------------------------|---|---|--|
| 1                                    | Understand the management of a customer service award programme | 1.1                                     | Justify the reasons for an award programme   |
|                                      |   | 1.2                                     | Explain how to make use of a customer service award programme as a promotional tool  |
|                                      |   | 1.3                                     | Explain the likely impact of organisational culture on a customer service award programme  |
|                                      |   | 1.4                                     | Explain the requirements of a business case for a customer service award programme   |
| 2                                    | Be able to plan a customer service award programme              | 2.1                                     | Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme                               |
|                                      |   | 2.2                                     | Evaluate the benefits, drawbacks and costs of different options for a customer service award programme                                     |
|                                      |   | 2.3                                     | Select the option that best meets the objectives of the award programme  |
|                                      |   | 2.4                                     | Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales                                    |
|                                      |   | 2.5                                     | Develop award criteria that are transparent and fair   |
| 3                                    | Be able to manage a customer service award programme            | 3.1                                     | Promote the award programme with the dual purpose of motivating team members and engaging customers  |
|                                      |   | 3.2                                     | Take action to ensure that award winners are recognised in a way that demonstrates organisational commitment to excellent customer service |
|                                      |   | 3.3                                     | Evaluate the effectiveness of a customer service award programme   |

## Unit Y/506/2183

### Manage the use of technology to improve customer service

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:  |
|--|--|
| 1 Understand how to manage the use of technology to improve customer service                       | 1.1 Analyse developments in information and communication technology that relate to customer service<br><br>1.2 Analyse the features, functions and implications of technology for customer service delivery<br><br>1.3 Explain how to monitor the use of technology to improve customer service   |
| 2 Be able to identify opportunities for customer service improvement through the use of technology | 2.1 Review the effectiveness of customer service delivery against agreed criteria<br><br>2.2 Identify how customer service delivery could be improved by the introduction or adaptation of technology<br><br>2.3 Assess the costs of changes in the use of technology to improve customer service delivery<br><br>2.4 Make recommendations for changes in the use of technology through a costed business case   |
| 3 Be able to implement changes in technology to improve customer service                           | 3.1 Plan the implementation of changes in the use of technology in a way that minimises disruption to business<br><br>3.2 Update colleagues on the implementation and expected benefits of new technology<br><br>3.3 Provide staff with training in the use of new technology<br><br>3.4 Monitor the implementation of changes in the use of technology in line with the plan<br><br>3.5 Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria |

## Unit Y/506/2166

### Develop resources to support consistency of customer service delivery

| Learning Outcome - The learner will: |  | Assessment Criterion - The learner can: |  |
|--------------------------------------|--|---|--|
| 1                                    | Understand how knowledge resources are used to support customer service delivery | 1.1                                     | Explain the structure of a customer service knowledge base   |
|                                      |  | 1.2                                     | Explain the uses of a customer service knowledge base  |
|                                      |  | 1.3                                     | Explain the use of customers' frequently asked questions to support customer service delivery                  |
|                                      |  | 1.4                                     | Explain the input and update routines for adding to the knowledge base   |
|                                      |  | 1.5                                     | Explain the content requirements of resource materials and how they should be expressed                        |
| 2                                    | Be able to create and maintain a customer service knowledge base                 | 2.1                                     | Identify the information that should be included in a customer service knowledge base                          |
|                                      |  | 2.2                                     | Confirm that a knowledge base is kept up to date   |
|                                      |  | 2.3                                     | Promote the contents and use of a knowledge base   |
| 3                                    | Be able to develop customer service resource materials                           | 3.1                                     | Describe the types of questions frequently asked by customers  |
|                                      |  | 3.2                                     | Identify the types of resources needed to support customer service delivery from an analysis of customer needs |
|                                      |  | 3.3                                     | Identify who will use the resources and in what way  |
|                                      |  | 3.4                                     | Develop resources that meet organisational requirements  |
|                                      |  | 3.5                                     | Communicate the availability and nature of the resources to those who will use them                            |

## Unit D/506/2167

### Use service partnerships to deliver customer service

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:  |
|---|--|
| 1 Understand the use of a service partnership in customer service delivery        | 1.1 Explain the roles and responsibilities of the partners involved in a service chain<br>1.2 Explain the advantages and limitations of using a service partnership<br>1.3 Explain the use and value of formal and informal service level agreements   |
| 2 Understand ways of building relationships within a customer service partnership | 2.1 Describe effective communication methods for dealing with service partners<br>2.2 Explain how to develop positive relationships with service partners<br>2.3 Describe negotiating techniques for dealing with service partners<br>2.4 Describe actions that can be taken to resolve any conflict of interest with service partners   |
| 3 Be able to deliver customer service within a customer service partnership       | 3.1 Identify the levels of authority that exist within a service partnership<br>3.2 Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery<br>3.3 Establish service procedures that are acceptable to all members of a service partnership<br>3.4 Agree with service partners priorities and resolutions relating to conflicts of interest<br>3.5 Identify areas for improvement from the analysis of a range of sources of information |

## Unit K/506/2169

### Resolve customers' problems

| Learning Outcome - The learner will:                              | Assessment Criterion - The learner can:  |
|---|--|
| 1 Understand the monitoring and resolution of customers' problems | 1.1 Assess the suitability of a range of techniques for monitoring customer problems<br>1.2 Explain how to use the resolution of customers' problems to improve products and/or services<br>1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance<br>1.4 Explain the features of negotiating techniques used to resolve customers' problems   |
| 2 Be able to deal with customers' problems                        | 2.1 Confirm the nature and cause of customers' problems<br>2.2 Explain when customers' problems should be treated as complaints<br>2.3 Explain the benefits to customers and the organisation of the options available to solve problems<br>2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems<br>2.5 Explain to customers the options for resolving their problems<br>2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority<br>2.7 Inform colleagues of the nature of problems and actions taken<br>2.8 Evaluate the effectiveness of the resolution of customers' problems |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems



## Unit R/506/2151

### Resolve customers' complaints

| Learning Outcome - The learner will:                                       | Assessment Criterion - The learner can:   |
|--|---|
| <p>1 Understand the monitoring and resolution of customers' complaints</p> | <p>1.1 Assess the suitability of a range of monitoring techniques for customers' complaints</p> <p>1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery</p> <p>1.3 Explain negotiating techniques used to resolve customers' complaints</p> <p>1.4 Explain conflict management techniques used in dealing with upset customers</p> <p>1.5 Explain organisational procedures for dealing with customer complaints</p> <p>1.6 Explain when to escalate customers' complaints</p> <p>1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint</p> <p>1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services</p> |
| <p>2 Be able to deal with customers' complaints</p>                        | <p>2.1 Confirm the nature, cause and implications of customers' complaints</p> <p>2.2 Take personal responsibility for dealing with complaints</p> <p>2.3 Communicate in a way that recognises customers' problems and understands their points of view</p> <p>2.4 Explain the advantages and limitations of different complaint response options to customers</p> <p>2.5 Explain the advantages and limitations of different complaint response options to the organisation</p>  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 2.6 Keep customers informed of progress
- 2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority
- 2.8 Record the outcome of the handling of complaints for future reference
- 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

## Unit D/506/2170

### Gather, analyse and interpret customer feedback

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

**Learning Outcome - The learner will:****Assessment Criterion - The learner can:**

|   |     |  |
|---|-----|--|
|   | 3.3 | Verify that all data is handled in line with legal, organisational and ethical policies and procedures |
| 4 |     | Be able to analyse and interpret customer feedback to recommend improvements                           |
|   | 4.1 | Use data analysis methods to identify patterns and trends in customer feedback                         |
|   | 4.2 | Use the findings of a data analysis to identify areas for improvement to customer service              |
|   | 4.3 | Present the findings of an analysis in the agreed format   |
|   | 4.4 | Recommend improvements in response to the findings of an analysis                                      |

## Unit K/506/2172

### Monitor the quality of customer service interactions

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| 1 Understand how to monitor the quality of customer service interactions     | 1.1 Describe techniques for monitoring the quality of customer service interactions<br>1.2 Explain organisational procedures and guidelines for customer service delivery<br>1.3 Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions<br>1.4 Explain how to construct a representative sample of customer service interactions for monitoring purposes<br>1.5 Explain how data protection legislation applies to monitoring the quality of customer service interactions<br>1.6 Explain how monitoring actions taken can identify possible improvements in customer service interactions<br>1.7 Explain techniques to gather customer feedback |
| 2 Be able to prepare to monitor the quality of customer service interactions | 2.1 Identify the criteria against which the quality of customer service interactions will be monitored<br>2.2 Specify a sampling frame that would provide information to meet monitoring objectives<br>2.3 Select monitoring techniques that are capable of collecting the required information<br>2.4 Ensure that staff and customers are made aware of the fact that they will be monitored   |
| 3 Be able to monitor the quality of customer service interactions            | 3.1 Monitor the quality of customer service interactions with minimal disruption to business<br>3.2 Assess the quality of customer service interactions against agreed criteria   |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

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

## Unit R/506/2960

### Develop a customer service strategy

| Learning Outcome - The learner will:                        | Assessment Criterion - The learner can:   |
|---|---|
| 1 Understand the development of a customer service strategy | 1.1 Explain the relationship between a customer service strategy and the organisation's overall business strategy<br><br>1.2 Assess sources of information about customers and their expectations<br><br>1.3 Analyse the value of customer loyalty<br><br>1.4 Evaluate practices that can help build customer loyalty<br><br>1.5 Explain the components of an effective customer service strategy<br><br>1.6 Explain the relationship between customer expectations and the service offer as defined in the business strategy   |
| 2 Be able to develop a customer service strategy            | 2.1 Evaluate current thinking on good practice in customer service from research<br><br>2.2 Identify organisational values, aims and objectives to be considered in developing the customer service strategy<br><br>2.3 Assess the implications of legal and regulatory requirements, codes of practice and ethical considerations for customer service<br><br>2.4 Develop a customer service strategy that is consistent with best practice and organisational values, aims and objectives<br><br>2.5 Analyse the roles of those responsible for achieving different parts of the customer service strategy<br><br>2.6 Specify mechanisms to evaluate the customer service strategy<br><br>2.7 Evaluate the implications of a customer service strategy for the organisation |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 2.8 Obtain approval for the customer service strategy from decision makers



## Unit D/506/2962

### Develop a social media strategy for customer service

| Learning Outcome - The learner will:                                     | Assessment Criterion - The learner can:  |
|--|--|
| 1 Understand the development of a customer service social media strategy | 1.1 Explain the role of social media within the organisation's customer service strategy<br>1.2 Analyse the components and scope of a social media strategy and its links with other aspects of the organisation<br>1.3 Explain the importance of marketing and brand values for the organisation's strategy<br>1.4 Explain the functionality and features of external social media tools<br>1.5 Analyse media management tools in relation to social networking<br>1.6 Evaluate the way in which the organisation's use of social media contributes to business performance   |
| 2 Be able to develop a customer service social media strategy            | 2.1 Evaluate the factors affecting the development of a customer service social media strategy<br>2.2 Assess the suitability of different methods of engaging customers using social media<br>2.3 Analyse competitor presence and activity in social media<br>2.4 Formulate a vision for a social media strategy that takes account of the organisation's operating environment and practical constraints<br>2.5 Develop a strategy that is consistent with the organisation's overall business strategy and objectives and addresses identified risks<br>2.6 Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- |   |  |     |  |
|---|--|-----|--|
| 3 | Be able to promote the benefits of social media networking to customer service | 3.1 | Evaluate the benefits and drawbacks of using social media for dissemination purposes |
|   |  | 3.2 | Analyse the benefits and consequences of social media engagement with customers      |
|   |  | 3.3 | Promote on-going dialogue with customers through social networking                   |
|   |  | 3.4 | Act as a social media “champion” within the organisation                             |
|   |  | 3.5 | Analyse the risks attached to the use of social media                                |

## Unit H/506/2963

### Develop customer service through social media

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| 1 Understand the use of social media for customer service  | 1.1 Assess the role of social media in achieving organisational objectives<br>1.2 Describe how mainstream and niche social media platforms are used by customers<br>1.3 Explain the legislation and regulations that affect the use of social media<br>1.4 Explain the etiquette required when engaging customers via different social media platforms<br>1.5 Explain how to establish key performance indicators (KPIs) to measure improvements in customer service performance  |
| 2 Be able to identify the scope for improvements to customer service through the use of social media | 2.1 Identify social media platforms that are most likely to be used by the organisation's customers<br>2.2 Identify developments within the organisation that could benefit from promotion through social media networks<br>2.3 Analyse how the organisation and its competitors use social media<br>2.4 Develop profiles of how customers and potential customers use social media<br>2.5 Define improvements to customer service that could be achieved through the organisation's use of social media<br>2.6 Specify objectives and organisational policy for participating in social media networks |
| 3 Be able to develop customer service provision through social media networks                        | 3.1 Develop a plan for the enhanced use of social media to deliver customer service based on analyses of data gathered and profiles   |

**Learning Outcome - The learner will:****Assessment Criterion - The learner can:**

- 3.2 Allocate responsibilities for making improvements to customer service through the use of social media
- 3.3 Develop procedures for providing customer service to customers via social media networks in line with organisational guidelines
- 3.4 Measure the impact and effectiveness of the use of customer service through social media networks against agreed criteria

## Unit M/506/1962

### Encourage learning and development

| Learning Outcome - The learner will: |   | Assessment Criterion - The learner can: |   |
|--------------------------------------|---|---|---|
| 1                                    | Understand the principles of learning and development     | 1.1                                     | Assess the role of continuous professional development (CPD) in identifying and meeting individuals' learning and development for current and future business needs |
|                                      |   | 1.2                                     | Analyse the advantages and limitations of different learning and development methods  |
|                                      |   | 1.3                                     | Explain how to identify individuals' learning and development needs   |
|                                      |   | 1.4                                     | Evaluate the role of self-reflection in learning and development  |
| 2                                    | Be able to support individuals' learning and development  | 2.1                                     | Promote the benefits of learning to people in own area of responsibility  |
|                                      |   | 2.2                                     | Support individuals in identifying their current and likely future learning and development needs from a range of information sources                               |
|                                      |   | 2.3                                     | Agree with individuals the learning activities to be undertaken, ensuring they are within agreed budgets and consistent with business needs                         |
|                                      |   | 2.4                                     | Summarise agreed learning objectives, learning activities, review mechanisms and success criteria in a personal development plan                                    |
|                                      |   | 2.5                                     | Create an environment that encourages and promotes learning and development   |
|                                      |   | 2.6                                     | Provide opportunities for individuals to apply their developing competence in the workplace   |
| 3                                    | Be able to evaluate individuals' learning and development | 3.1                                     | Analyse information from a range of sources on individuals' performance and development   |
|                                      |   | 3.2                                     | Evaluate the effectiveness of different learning and development methods  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 3.3 Agree revisions to personal development plans in the light of feedback

## Unit T/506/1980

### Initiate and implement operational change

| Learning Outcome - The learner will: |   | Assessment Criterion - The learner can: |   |
|--------------------------------------|---|---|---|
| 1                                    | Understand the implementation of operational change         | 1.1                                     | Explain sources of information indicating the need for change   |
|                                      |   | 1.2                                     | Analyse the advantages and limitations of different project and change management techniques  |
|                                      |   | 1.3                                     | Analyse the characteristics, strengths and weaknesses of evaluation techniques used in change management                              |
| 2                                    | Be able to plan for operational change                      | 2.1                                     | Develop an operational plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and resources |
|                                      |   | 2.2                                     | Take action to ensure that colleagues are briefed on their roles, responsibilities and change objectives                              |
|                                      |   | 2.3                                     | Provide colleagues with the support needed to implement operational change  |
| 3                                    | Be able to manage operational change                        | 3.1                                     | Implement the change plan within the agreed timescale using available resources   |
|                                      |   | 3.2                                     | Assess the significance of deviations from the change plan  |
|                                      |   | 3.3                                     | Address interdependency issues and tensions that affect the achievement of change objectives  |
|                                      |   | 3.4                                     | Assess the value and risks of unintended outcomes from operational change   |
|                                      |   | 3.5                                     | Inform stakeholders of any unforeseen obstacles or problems and the actions that have been taken                                      |
| 4                                    | Be able to evaluate the effectiveness of operational change | 4.1                                     | Evaluate the effectiveness of operational change  |
|                                      |   | 4.2                                     | Identify areas for improvement, justifying conclusions and recommendations with evidence  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 4.3 Communicate to stakeholders the lessons learned from the change



## Unit R/506/1999 Manage a project

| Learning Outcome - The learner will: |  | Assessment Criterion - The learner can: |   |
|--------------------------------------|--|---|---|
| 1                                    | Understand the management of a project | 1.1                                     | Explain how to carry out a cost-benefit analysis for a project  |
|                                      |  | 1.2                                     | Evaluate the use of risk analysis techniques  |
|                                      |  | 1.3                                     | Evaluate project planning and management tools and techniques   |
|                                      |  | 1.4                                     | Evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources   |
|                                      |  | 1.5                                     | Analyse the requirements of project governance arrangements   |
| 2                                    | Be able to plan a project              | 2.1                                     | Analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work  |
|                                      |  | 2.2                                     | Agree the objectives and scope of proposed projects with stakeholders   |
|                                      |  | 2.3                                     | Assess the interdependencies and potential risks within a project   |
|                                      |  | 2.4                                     | Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan |
|                                      |  | 2.5                                     | Develop proportionate and targeted plans to manage identified risks and contingencies   |
|                                      |  | 2.6                                     | Apply project lifecycle approaches to the progress of a project   |
| 3                                    | Be able to manage a project            | 3.1                                     | Allocate resources in accordance with the project plan  |
|                                      |  | 3.2                                     | Brief project team members on their roles and responsibilities  |
|                                      |  | 3.3                                     | Implement plans within agreed budgets and timescales  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- |   |     |   |
|---|-----|---|
|   | 3.4 | Communicate the requirements of the plans to those who will be affected   |
|   | 3.5 | Revise plans in the light of changing circumstances in accordance with project objectives and identified risks    |
|   | 3.6 | Keep stakeholders up to date with developments and problems   |
|   | 3.7 | Complete close-out actions in accordance with project plans   |
|   | 3.8 | Adhere to organisational policies and procedures, legal and ethical requirements when managing a project          |
| 4 |     | Be able to evaluate the effectiveness of a project  |
|   | 4.1 | Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources |
|   | 4.2 | Evaluate the effectiveness of capturing and managing project-related knowledge                                    |
|   | 4.3 | Report on the effectiveness of plans  |

## Unit L/506/2004

### Manage business risk

| Learning Outcome - The learner will:                | Assessment Criterion - The learner can:   |
|---|---|
| <p>1 Understand the management of business risk</p> | <p>1.1 Explain what is meant by business risk</p> <p>1.2 Analyse business risk identification theories and models</p> <p>1.3 Explain measures and techniques to mitigate business risk</p> <p>1.4 Explain their own level of authority in managing risk</p>   |
| <p>2 Be able to address business risk</p>           | <p>2.1 Monitor work in line with organisational risk procedures</p> <p>2.2 Identify potential risks using agreed risk criteria</p> <p>2.3 Assess identified risks, their potential consequences and the probability of them happening</p> <p>2.4 Communicate to stakeholders the likelihood of the risk occurring and its potential consequences</p> <p>2.5 Explain organisational business risk management policies</p>  |
| <p>3 Be able to mitigate business risk</p>          | <p>3.1 Develop risk management plans and processes that are proportionate to the risk and the available resources</p> <p>3.2 Implement risk management plans in accordance with organisational requirements</p> <p>3.3 Monitor on-going risk-related developments and amend plans in the light of changing circumstances</p> <p>3.4 Keep stakeholders informed of any developments and their possible consequences</p> <p>3.5 Evaluate the effectiveness of actions taken, identifying possible future improvements</p> |

## Unit R/506/1954

### Support environmental sustainability in a business environment

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:  |
|--|--|
| 1 Understand the principles supporting environmental sustainability in a business environment  | 1.1 Describe current legislation in relation to environmental sustainability in a business environment   |
|  | 1.2 Explain government incentives that support environmental sustainability in a business environment  |
|  | 1.3 Analyse the relationship between environmental sustainability and corporate social responsibility  |
|  | 1.4 Explain the health and safety considerations for environmental sustainability and waste management   |
|  | 1.5 Explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures                    |
| 2 Be able to implement best practice in environmental sustainability in a business environment | 2.1 Identify the environmental standards that are relevant to an organisation  |
|  | 2.2 Evaluate the impact of an organisation's business on its environment   |
|  | 2.3 Promote a culture of efficient consumption of energy in line with an organisation's energy management policies                             |
|  | 2.4 Establish procedures to minimise waste and maximise the recycling of materials   |
|  | 2.5 Establish procedures to meet hazardous waste regulations   |
|  | 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment |

## Unit D/504/4056

### Manage Health and Safety in own area of responsibility

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:  |
|--|--|
| 1 Understand responsibilities and liabilities in relation to health and safety legislation             | 1.1 Evaluate personal responsibilities and liabilities under health and safety legislation                                 |
|  | 1.2 Describe an organisation's responsibilities and liabilities under health and safety legislation                        |
|  | 1.3 Identify specialists to consult with when health and safety issues outside own remit are identified                    |
| 2 Understand how to assess, monitor and minimise health and safety risks in own area of responsibility | 2.1 Describe the types of hazards and risks that may arise in relation to health and safety                                |
|  | 2.2 Explain how to use systems for identifying hazards and assessing risks   |
|  | 2.3 Explain how to monitor, evaluate and report on health and safety within own area of responsibility                     |
|  | 2.4 Describe the types of actions which should be undertaken to control or eliminate health and safety hazards.            |
| 3 Be able to review health and safety policy in own area of responsibility                             | 3.1 Review written health and safety policy against requirements for own area of responsibility                            |
|  | 3.2 Communicate any recommendations for changes to health and safety policy to relevant individuals                        |
| 4 Be able to communicate health and safety policy in own area of responsibility                        | 4.1 Communicate written health and safety policy to all people in own area of responsibility and other relevant parties    |
|  | 4.2 Ensure all people in own area of responsibility and other relevant parties understand written health and safety policy |

| Learning Outcome - The learner will:                                 | Assessment Criterion - The learner can:  |
|--|--|
| 5 Be able to monitor health and safety in own area of responsibility | 5.1 Evaluate systems for identifying and assessing health and safety hazards and risks within own area of responsibility<br><br>5.2 Assess working environment within own area of responsibility against organisation's health and safety policy<br><br>5.3 Identify and evaluate non-compliance with health and safety policy and practices within own area of responsibility<br><br>5.4 Take appropriate action to eliminate or control identified hazards and identified risks<br><br>5.5 Evaluate health and safety requirements in project or operational plans within own area of responsibility |

## Unit H/503/0417

### Manage incident management systems in a contact centre

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:  |
|--|--|
| 1 Be able to ensure the effective management of incidents through a contact centre                                     | 1.1 Ensure compliance with organisational procedures for handling reported incidents through an analysis of incident handling against agreed criteria<br><br>1.2 Use feedback to identify areas for enhancements to incident management systems<br><br>1.3 Identify metrics that measure changes in performance in incident handling<br><br>1.4 Use the findings of reviews to make recommendations for the enhancement of performance in accordance with organisational procedures<br><br>1.5 Implement agreed changes in accordance with organisational procedures |
| 2 Be able to contribute to the development of organisational strategy for incident management through a contact centre | 2.1 Use an analysis of evidence to establish the need for changes in incident management handling<br><br>2.2 Develop recommendations for the ongoing review of organisational strategy for handling incidents in incident management<br><br>2.3 Ensure that the revised strategy meets organisational objectives   |
| 3 Understand the management of incidents reported to a contact centre  | 3.1 Explain the incident management services offered by the contact centre<br><br>3.2 Evaluate the strengths and weaknesses of methods of monitoring contact handling which leads to incident management<br><br>3.3 Evaluate the efficiency of techniques for analysing data and metrics relating to the handling of contacts which lead to incident management  |

**Learning Outcome - The learner will:****Assessment Criterion - The learner can:**

- 3.4 Evaluate methods of assessing the effectiveness of incident management against agreed criteria
- 3.5 Explain the importance of defining the boundaries of procedures dealing with incident management and contact centre responsibilities
- 3.6 Explain the importance of consultation with colleagues regarding possible changes in procedures
- 3.7 Explain the organisational strategy relevant to incident management by the contact centre



## Unit T/506/1820

### Promote equality, diversity and inclusion in the workplace

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:   |
|---|---|
| 1 Understand the organisational aspects of equality, diversity and inclusion in the workplace | 1.1 Explain the difference between equality, diversity and inclusion<br>1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy<br>1.3 Explain the potential consequences of breaches of equality legislation<br>1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion               |
| 2 Understand the personal aspects of equality, diversity and inclusion in the workplace       | 2.1 Explain the different forms of discrimination and harassment<br>2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace<br>2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace   |
| 3 Be able to support equality, diversity and inclusion in the workplace                       | 3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace<br>3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace<br>3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace |

## Unit A/506/1821

### Manage team performance

| Learning Outcome - The learner will:                 | Assessment Criterion - The learner can:   |
|--|---|
| 1 Understand the management of team performance      | 1.1 Explain the use of benchmarks in managing performance<br>1.2 Explain a range of quality management techniques to manage team performance<br>1.3 Describe constraints on the ability to amend priorities and plans   |
| 2 Be able to allocate and assure the quality of work | 2.1 Identify the strengths, competences and expertise of team members<br>2.2 Allocate work on the basis of the strengths, competences and expertise of team members<br>2.3 Identify areas for improvement in team members' performance outputs and standards<br>2.4 Amend priorities and plans to take account of changing circumstances<br>2.5 Recommend changes to systems and processes to improve the quality of work   |
| 3 Be able to manage communications within a team     | 3.1 Explain to team members the lines of communication and authority levels<br>3.2 Communicate individual and team objectives, responsibilities and priorities<br>3.3 Use communication methods that are appropriate to the topics, audience and timescales<br>3.4 Provide support to team members when they need it<br>3.5 Agree with team members a process for providing feedback on work progress and any issues arising<br>3.6 Review the effectiveness of team communications and make improvements |

## Unit J/506/1921

### Manage individuals' performance

| Learning Outcome - The learner will:                             | Assessment Criterion - The learner can:  |
|--|--|
| 1 Understand the management of underperformance in the workplace | 1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance<br><br>1.2 Explain how to identify causes of underperformance<br><br>1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively<br><br>1.4 Explain how to address issues that hamper individuals' performance<br><br>1.5 Explain how to agree a course of action to address underperformance  |
| 2 Be able to manage individuals' performance in the workplace    | 2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives<br><br>2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs<br><br>2.3 Apply motivation techniques to maintain morale<br><br>2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards<br><br>2.5 Monitor individuals' progress towards objectives in accordance with agreed plans<br><br>2.6 Recognise individuals' achievement of targets and quality standards<br><br>2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace |

## Unit F/502/8612

### Negotiating, handling objections and closing sales

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| <p>1 Understand how to handle objections and negotiate with the customer</p> | <p>1.1 Describe the scope of authority and responsibility when dealing with objections</p> <p>1.2 Identify the resources available to counter the sales objections</p> <p>1.3 Describe how to plan and prepare for negotiation</p> <p>1.4 Describe how to use testimonials to progress a sale</p> <p>1.5 Explain the advantages and disadvantages of different methods of closing a sale</p> <p>1.6 Explain organisational procedures for documenting the negotiated sale</p> |
| <p>2 Be able to prepare for objections and negotiation with the customer</p> | <p>2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer</p> <p>2.2 Confirm authorisation to negotiate</p> <p>2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome</p>   |
| <p>3 Be able to handle objections</p>  | <p>3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques</p> <p>3.2 Identify and prioritise customers' concerns</p> <p>3.3 Provide evidence to the customer of the strengths of the organisation's products or services</p> <p>3.4 Confirm with the customer that the objection(s) have been overcome</p>  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

|   |   |   |
|---|---|---|
|   | 3.5   | Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals |
| 4 | Be able to negotiate with the customer          | 4.1 Carry out negotiations according to negotiation plan  |
|   | 4.2   | Promote the benefits of what is being offered to the customer   |
|   | 4.3   | Explain to the customer when and why no further adjustment is possible  |
|   | 4.4   | Obtain support to progress negotiation that is outside own level of authority   |
| 5 | Be able to close the sale following negotiation | 5.1 Apply a trial close in accordance with the negotiation plan   |
|   | 5.2   | Respond to any further objections and concerns  |
|   | 5.3   | Identify and make use of potential add-on, up-selling or cross-selling opportunities                                    |
|   | 5.4   | Summarise agreements made in accordance with organisational procedures and close the sale                               |

## Unit R/502/8615

### Obtaining and analysing sales-related information

| Learning Outcome - The learner will: |  | Assessment Criterion - The learner can: |   |
|--------------------------------------|--|---|---|
| 1                                    | Understand the uses of sales-related information                                     | 1.1                                     | Explain the importance of up-to-date information for sales planning purposes  |
|                                      |  | 1.2                                     | Explain the benefits and risks of using a range of information sources to support sales activities  |
|                                      |  | 1.3                                     | Explain the limitations of sales-related information  |
|                                      |  | 1.4                                     | Explain the importance of reviewing sales data requirements for current and future use  |
| 2                                    | Understand how to use tools and methods to analyse sales-related information         | 2.1                                     | Explain the advantages and disadvantages of different systems to gather sales-related information   |
|                                      |  | 2.2                                     | Explain how to use different software packages for analysing and presenting sales-related information   |
| 3                                    | Be able to obtain sales-related information about customers, markets and competitors | 3.1                                     | Specify the information needed to develop an understanding of customers, competitors and markets  |
|                                      |  | 3.2                                     | Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors   |
|                                      |  | 3.3                                     | Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation |
| 4                                    | Be able to use tools and methods to analyse sales-related information                | 4.1                                     | Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information  |
|                                      |  | 4.2                                     | Define the information needs of the target audience for different types of sales-related information  |
|                                      |  | 4.3                                     | Use the analytical protocols that are appropriate to the selected tools and methods   |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information
- 4.5 Validate the reliability and validity of the findings of the analysis
- 4.6 Provide sales-related information to the target audience within the agreed timescale and budget

## Unit K/502/8622

### Buyer behaviour in sales situations

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:  |
|--|--|
| <p>1 Understand the impact of different models of buyer behaviour on the sales cycle</p> | <p>1.1 Explain the consumer buying decision-making process</p> <p>1.2 Explain how the consumer buying decision-making process affects the sales cycle</p> <p>1.3 Describe the influences that affect the consumer decision-making process</p> <p>1.4 Explain the organisational buying decision-making process</p> <p>1.5 Explain how the organisational buying decision-making process affects the sales cycle</p> <p>1.6 Describe the influences that affect the organisational buying decision-making process</p> <p>1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle</p> |
| <p>2 Be able to respond to the buyer at each stage of the decision making process</p>    | <p>2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process</p> <p>2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role</p> <p>2.3 Use objections as buying opportunities</p> <p>2.4 Confirm solution(s) offered meet the needs and wants of decision-makers</p>  |



## Unit K/503/0418

### Manage incidents referred to a contact centre

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| <p>1 Be able to manage incidents through a contact centre</p>                                | <p>1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures</p> <p>1.2 Select resources that are available to deal with reported incidents</p> <p>1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures</p> <p>1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures</p> <p>1.5 Monitor the management of the incident in accordance with organisational procedures</p> <p>1.6 Ensure that the correct decision paths have been followed to manage reported incidents</p> <p>1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures</p> |
| <p>2 Be able to provide support to colleagues on incident management in a contact centre</p> | <p>2.1 Agree with colleagues the areas in which they need support and guidance in incident management</p> <p>2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs</p> <p>2.3 identify actions to improve team performance in incident handling from a review of incident management results</p>  |
| <p>3 Understand how to manage incidents reported to a contact centre</p>                     | <p>3.1 Explain the incident management services offered by the contact centre</p> <p>3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident</p>  |

**Learning Outcome - The learner will:****Assessment Criterion - The learner can:**

- 3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents
- 3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident
- 3.5 Describe the strengths and weaknesses of different types of support for colleagues
- 3.6 Explain the importance of reviewing incident management results

## Unit D/506/2055

### Design business processes

| Learning Outcome - The learner will:   | Assessment Criterion - The learner can:   |
|--|---|
| <p>1 Understand techniques and tools that support the design of business processes</p> | <p>1.1 Analyse the principles of business change and business process re-engineering</p> <p>1.2 Evaluate the concept and application of workflow patterns and usability testing</p> <p>1.3 Evaluate a range of modelling tools</p> <p>1.4 Analyse the factors to be taken into account when evaluating the effectiveness of business processes</p>  |
| <p>2 Be able to develop business processes</p>   | <p>2.1 Evaluate the scope for business process improvement and constraints</p> <p>2.2 Generate ideas that meet defined business needs</p> <p>2.3 Test a proposed process through a modelling exercise</p> <p>2.4 Evaluate the feasibility and viability of a proposed process against agreed criteria</p> <p>2.5 Establish the degree of overlap between a proposed process and existing processes and systems</p> <p>2.6 Resolve tensions between existing and proposed systems and processes</p> <p>2.7 Adhere to organisational policies and procedures, legal and ethical requirements when developing business processes</p> |
| <p>3 Be able to evaluate the effectiveness of business processes</p>                   | <p>3.1 Analyse valid information using techniques that are appropriate to the process being evaluated</p> <p>3.2 Assess the cost and benefit of a business process to the organisation</p>  |

**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

- 3.3 Justify recommendations for the rejection, adoption or enhancements to processes with evidence

## Unit Y/503/0401

### Manage direct sales operations in a contact centre

| Learning Outcome - The learner will: |   | Assessment Criterion - The learner can: |  |
|--------------------------------------|---|---|--|
| 1                                    | Be able to contribute to the development of organisational sales strategy in a contact centre                 | 1.1                                     | Identify the features of organisational sales strategy that have an impact on direct sales operations                                      |
|                                      |   | 1.2                                     | Recommend developments to the sales strategy that are capable of enhancing sales performance   |
| 2                                    | Be able to develop procedures and guidelines to be used for direct sales through a contact centre             | 2.1                                     | Assess the importance of sales information that is needed to achieve the sales objectives  |
|                                      |   | 2.2                                     | Confirm that the required sales information can be collected with minimum disruption to sales activities                                   |
|                                      |   | 2.3                                     | Define the sales style and techniques to be used to achieve direct sales objectives  |
|                                      |   | 2.4                                     | Confirm the fitness for purpose of the draft procedures and guidelines through a test and trial  |
| 3                                    | Be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre | 3.1                                     | Review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria |
|                                      |   | 3.2                                     | Identify the actions needed to achieve sales objectives and plans  |
|                                      |   | 3.3                                     | Design sales analysis tools that are capable of monitoring sales and enhancing performance   |
|                                      |   | 3.4                                     | Implement the agreed actions to enhance performance in accordance with the sales plan  |
|                                      |   | 3.5                                     | Define sales reporting requirements that are capable of capturing the required monitoring and sales performance information                |

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:  |
|---|--|
| <p>4 Understand the principles underpinning direct sales activities in a contact centre</p> | <p>4.1 Evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales</p> <p>4.2 Evaluate current organisational approaches and systems for direct sales</p> <p>4.3 Evaluate the impact of regulation and legislation on direct sales operations</p> <p>4.4 Explain how to specify sales analysis requirements</p> <p>4.5 Evaluate the implications of the options for sales monitoring tools</p> <p>4.6 Evaluate how an organisational sales strategy drives direct sales operations</p> |

## Unit J/502/4397 Bespoke Software

| Learning Outcome - The learner will:  | Assessment Criterion - The learner can:   |
|---|---|
| 1 Input and combine information using bespoke software                                      | 1.1 Input relevant information accurately so that it is ready for processing<br><br>1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications   |
| 2 Create and modify appropriate structures to organise and retrieve information efficiently | 2.1 Evaluate the use of software functions to structure, layout and style information<br><br>2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently<br><br>2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available  |
| 3 Exploit the functions of the software effectively to process and present information      | 3.1 Select and use appropriate tools and techniques to edit, analyse and format information<br><br>3.2 Check information meets needs, using IT tools and making corrections as necessary<br><br>3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs<br><br>3.4 Select and use presentation methods to aid clarity and meaning |

## Unit J/506/2292

### Encourage innovation

| Learning Outcome - The learner will:                                       | Assessment Criterion - The learner can:   |
|--|---|
| <p>1 Be able to identify opportunities for innovation</p>                  | <p>1.1 Analyse the advantages and disadvantages of techniques used to generate ideas</p> <p>1.2 Explain how innovation benefits an organisation</p> <p>1.3 Explain the constraints on their own ability to make changes</p> <p>1.4 Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement</p> <p>1.5 Engage team members in finding opportunities to innovate and suggest improvements</p> <p>1.6 Monitor performance, products and/or services and developments in areas that may benefit from innovation</p> <p>1.7 Analyse valid information to identify opportunities for innovation and improvement</p> |
| <p>2 Be able to generate and test ideas for innovation and improvement</p> | <p>2.1 Generate ideas for innovation or improvement that meet the agreed criteria</p> <p>2.2 Test selected ideas that meet viability criteria</p> <p>2.3 Evaluate the fitness for purpose and value of the selected ideas</p> <p>2.4 Assess potential innovations and improvements against the agreed evaluation criteria</p>   |
| <p>3 Be able to implement innovative ideas and improvements</p>            | <p>3.1 Explain the risks of implementing innovative ideas and improvements</p> <p>3.2 Justify conclusions of efficiency and value with evidence</p> <p>3.3 Prepare costings and schedules of work that will enable efficient implementation</p>   |



**Learning Outcome - The learner will:**

**Assessment Criterion - The learner can:**

3.4 Design processes that support efficient implementation



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