

Guidance and units

BTEC Short Courses

Edexcel Level 3 BTEC Certificate in Customer Service

September 2008

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Qualification titles covered by this specification

Edexcel Level 3 BTEC Certificate in Customer Service

This qualification has been accredited to the National Qualifications Framework (NQF) and is eligible for public funding as determined by the DfES under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfES and the regularly updated website www.dfes.gov.uk/. The NQF Qualifications Accreditation Number (QAN) should be used by centres when they wish to seek public funding for their learners. The QAN for this qualification is listed in *Annexe A*.

This qualification title is as it will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel. Providing this happens, centres are able to describe the programme of study leading to the award of the qualification in different ways to suit the medium and the target audience.

Technical Certificates

This qualification has been approved as a Technical Certificate for the Level 3 Customer Service Advanced Apprenticeship framework.

This qualification is assessed through onscreen objective testing which is externally set and marked by Edexcel. Centres will need to seek approval to offer the qualification. This qualification cannot be assessed through an externally verified portfolio. Please refer to the *Level 3 BTEC Certificate in Customer Service* section on page 4 for further details.

Introduction

This document contains the units and associated guidance for the National Qualifications Framework (NQF) Edexcel Level 3 BTEC Certificate in Customer Service. Each unit sets out the required outcomes and content and includes advice regarding appropriate delivery. This guidance contains further details of the assessment and quality assurance of these qualifications. It includes advice about Edexcel's policy regarding access to its qualifications, the design of programmes of study and delivery modes.

BTEC Short Courses are designed to meet a range of different needs. BTEC Short Courses at Levels 1-3 offer:

- maximum flexibility with programmes of usually 90, 180 or 300 hours available across all levels of the NQF
- the opportunity to certificate smaller blocks of learning which are designed to motivate learners and encourage widening participation in education and training
- courses that relate to the particular training and employment patterns in a sector
- courses that may offer preparation for specific jobs and subsequent achievement of NVQs or Apprenticeship Diplomas when in employment
- the opportunity to use a range of delivery methods
- opportunities for learners to develop skills that support career and professional development
- underpinning knowledge, skills and understanding linked, where appropriate, to named NVQs
- programmes that can enable progression either to higher levels of study or to other courses at the same level of study.

Structure of the qualification

The Edexcel Level 3 BTEC Certificate in Customer Service is a 90-hour qualification consisting of two mandatory units. Unit 1 consists of 40 guided learning hours, and Unit 2 consists of 50 guided learning hours.

To achieve the whole qualification, a learner must successfully complete the two units through completing the single external assessment.

Structure of the Level 3 BTEC Certificate in Customer Service	
Unit 1	Principles of Customer Service Delivery and Development
Unit 2	Knowing the Rules to Follow When Developing Customer Service

Key features

BTEC Short Course Awards, Certificates and Diplomas are designed to provide focused and specialist work-related qualifications in a range of sectors. The qualifications can provide a specialist emphasis for learners following a general vocational programme of study. BTEC Short Courses offer focused qualifications for learners, particularly more mature learners, who wish to follow a short programme of study directly related to their work experience or to an aspect of employment that they wish to move into.

On successful completion of these qualifications, learners may progress into or within employment and/or continue their study in the vocational area.

National Occupational Standards

Where appropriate, BTEC Short Courses are designed to relate to the National Occupational Standards in the relevant sector which, in turn, form the basis of National Vocational Qualifications (NVQs). They do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context. However, the qualifications can provide areas of underpinning knowledge for the National Occupational Standards, as well as developing practical skills in preparation for work and possible achievement of NVQs in due course.

This Level 3 BTEC Certificate in Customer Service relates to the National Occupational Standards for Customer Service.

Level 3 BTEC Certificate in Customer Service

The Level 3 BTEC Certificate in Customer Service has been approved as a Technical Certificate for the Level 3 Advanced Apprenticeship framework. A mapping of the links between the Edexcel Level 3 BTEC Certificate in Customer Service and the Level 3 NVQ in Customer Service showing the underpinning knowledge and understanding of the core units is provided in *Annexe C*. **For candidates who are also registered with Edexcel for their NVQ**, successful completion of this qualification will therefore provide sufficient evidence for the related underpinning knowledge of the appropriate NVQ units.

Alternative Edexcel qualifications which have been approved as Technical Certificates on the Customer Service Advanced apprenticeship framework are also available, for example, the Edexcel Level 3 BTEC Award in Customer Service which is assessed through an externally verified portfolio.

The Level 3 BTEC Certificate in Customer Service is designed to provide:

- education and training for those with a responsibility to provide customer service
- opportunities for employees responsible for customer service delivery to achieve a nationally recognised Level 3 vocationally specific qualification
- opportunities for full-time learners to gain a nationally recognised vocationally specific qualification to enter employment in the field of customer service or to progress to vocational qualifications such as the Level 4 NVQ in Customer Service

- the knowledge and understanding learners need to deliver and develop customer service
- opportunities for learners to focus on the development of the major key skills and the wider key skills, such as improving own learning and performance, problem solving and working with others, in a customer-service context
- opportunities for learners to develop a range of personal qualities and attitudes essential for successful performance in working life.

Unit format

All units in Edexcel BTEC Short Courses have a format which is designed to provide clear guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit is set out in the following way.

Unit title

The unit title is accredited by QCA and this form of words will appear on the learner's Notification of Performance (NOP).

NQF level

This is the level of study of the qualification as determined by the National Qualifications Framework (NQF).

Guided learning hours

Guided learning hours is 'a notional measure of the substance of a unit'. It includes an estimate of time that might be allocated to direct teaching, instruction and assessment, together with other structured learning time such as directed assignments or supported individual study. It excludes learner-initiated private study. Centres are advised to consider this definition when planning the programme of study associated with this specification.

Unit abstract

The unit abstract is designed to give the reader an appreciation of the value of the unit in the vocational setting of the qualification as well as highlighting the focus of the unit. It provides the reader with a snapshot of the aims of the unit and the key knowledge, skills and understanding developed while studying the unit. The unit abstract also emphasises links to the sector by describing what the unit offers the sector.

Learning outcomes

Learning outcomes state exactly what a learner should 'know, understand or be able to do' as a result of completing the unit.

Unit content

The unit content identifies the depth and breadth of knowledge and understanding needed for learners to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS). The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the qualification.

Each learning outcome is stated in full and then the prescribed key phrases or concepts related to that learning outcome are listed in italics, followed by the content that the learner needs to know and understand.

The unit content section will often have lists of topics that provide the range of the subject material required to be covered. Subject material may be further detailed by lists enclosed within brackets or an elongated dash which provide the defined elements of the specific topic item.

Assessment – Indicative assessment statements

For each learning outcome, suitable indicative assessment statements are given as a guide to the depth and breadth of assessment. These are indicative of test questions, but questions may be set on any mandatory content.

Any of the mandatory content may be used as the basis for assessment questions and centres should expect broad content coverage.

Essential guidance for tutors

This section is designed to give tutors additional guidance and amplification on the unit in order to provide for a coherence of understanding and a consistency of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content and its relationship with the learning outcomes and offers guidance about possible approaches to delivery. This advice is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – provides amplification about the nature and type of assessment of the unit.
- *Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications* – sets out links with other units within the qualification. These could be used to ensure that learners can relate different aspects within the qualification and offer opportunities for integration of learning, delivery and assessment. Links to the Occupational Standards will be highlighted here.
- *Essential resources* – identifies any specialist resources required to deliver the unit.
- *Indicative reading for learners* – provides a short list of learner resource material that benchmarks the level of study.

Key skills

This section identifies where there may be opportunities within the unit for the generation of evidence to meet the requirements of key skills units. Assessors should take care to become familiar with the key skills specifications and evidence requirements and not to rely on the contents of this section when presenting key skills evidence for moderation. Centres should refer to the QCA website (www.qca.org.uk) for the latest version of the key skills standards.

Assessment guidance

The overall grading for the Level 3 BTEC Certificate in Customer Service is a pass, based on the successful completion of both units through completing the single external assessment.

The purpose of assessment is to ensure that effective learning of the content of each unit has taken place.

In the Edexcel Level 3 BTEC Certificate in Customer Service, both units are assessed by means of a single one-hour externally set and marked on-screen test. The test will provide the only necessary assessment for the Level 3 BTEC Certificate in Customer Service and will address the range of content for both units. Centres must follow the *Centre Guidance for Online Tests: BTEC Certificates in Customer Service* which is available on Edexcel's website (www.edexcel.com).

All of the content in the specification is mandatory. Therefore, tutors should ensure that learners have covered all of the content before attempting to sit the test.

The test will be designed so that the recommended guided learning hours relating to each learning outcome will be reflected by the number of questions in the paper. For the Edexcel Level 3 BTEC Certificate in Customer Service the recommended guided learning hour weightings are:

Unit 1	
Learning outcome	Guided learning hours
Learning outcome 1	17
Learning outcome 2	11
Learning outcome 3	12
Unit 2	
Learning outcome 1	9
Learning outcome 2	9
Learning outcome 3	8
Learning outcome 4	14
Learning outcome 5	10

The indicative assessment statements, which are set out in the unit, give some idea of the types of questions which will be asked on different areas of content. There are two types of question — those assessing knowledge and those assessing understanding. At Level 3 approximately 60 per cent of the questions will assess understanding and the remaining 40 per cent of the questions will assess knowledge.

Indicative assessment statements beginning with the word 'identify' or 'describe' tend to lead to questions assessing knowledge. Indicative assessment statements beginning with the word 'explain' tend to lead to questions assessing understanding.

For example, the indicative assessment statement:

'Identify the factors which determine the customer service offer,' could lead to the question:

Which would most affect the extent of an organisation's service offer?

- 1 The number of local branches it has
- 2 The number of after sales-services offered by a competitor*
- 3 The number of staff it has
- 4 The number of customers it has'

And the indicative assessment statement:

'Explain how an organisation can gain competitive advantage'
could lead to the question:

A hardware store wishes to develop an advantage over a competitor. Which would best achieve this?

- 1 Providing free delivery.*
- 2 Increasing staff.
- 3 Changing to a new supplier.
- 4 Relocating the organisation to larger premises.'

However, sometimes an indicative assessment statement can lead to both types of question. For example, the indicative assessment statement:

‘Explain how the ethics and values base of an organisation can affect its approach to customer service.’

could lead to the question:

‘An organisation has ethical standards. This means it will:

- 1 Treat all suppliers differently
- 2 Pay less than the minimum wage
- 3 Sell organically grown produce*
- 4 Exploit suppliers in poorer countries’

which could be seen as a question assessing knowledge.

*Indicates the correct answer for each question.

If a learner should fail the test, they will receive information telling them how well they did in each part of the test. Tutors and learners should use this information to judge how well prepared the learner was for the test and in what areas they need to improve their knowledge and understanding before they attempt the test again.

Quality assurance

For this qualification assessment is externally set and marked by Edexcel. Edexcel implements a series of measures to ensure the effective development, delivery and monitoring of assessments.

As part of approval centres agree to abide by the conditions for delivery of onscreen testing and must follow invigilation guidance (see *Centre Handbook: Delivery and Quality Assurance for BTEC Qualifications with External Tests*).

Centres should enter learners for tests, and if necessary for retakes of tests, in accordance with the guidance given in the Centre Handbook. In particular centres’ should ensure that learners are adequately prepared and should not enter learners on a practise basis.

Edexcel will monitor centre performance in tests and pattern of test taking and reserves the right to externally inspect the invigilation of tests.

If a centre believes that any learner or assessor has acted inappropriately in relation to the conduct of tests then Edexcel should be notified.

Full information on quality assurance and feedback arrangements for externally set tests will be available through annual centre guidance issued on the website.

External assessment

The onscreen tests are set and marked by Edexcel and are available on demand.

Edexcel reserves the right to conduct an audit of the administration of the tests at short notice to guarantee their integrity.

Risk assessment

Edexcel has an approval process which creates a quality profile of each qualification programme in each centre and for the centre as a whole. This profile contributes to the determination of the nature of external verification activity for each programme and will also be used to initiate other quality-control measures by Edexcel.

Approval

When a centre applies for approval to offer a BTEC qualification it will be required to enter into an approvals contract.

The approvals contract is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and linked codes or regulations. Sanctions and tariffs will be applied if centres do not comply with the contract. This could ultimately result in the suspension of certification or withdrawal of approval.

Centres will need to apply to offer onscreen testing as part of qualification approval.

Programme design and delivery

The qualification consists of two mandatory units.

In the Level 3 BTEC Certificate in Customer Service, Unit 1 consists of 40 guided learning hours and Unit 2 consists of 50 guided learning hours. The definition of guided learning hours is 'a notional measure of the substance of a qualification'. It includes an estimate of time that might be allocated to direct teaching, instruction and assessment, together with other structured learning time such as directed assignments or supported individual study. It excludes learner-initiated private study. Centres are advised to consider this definition when planning the programme of study associated with this specification.

Mode of delivery

Edexcel does not define the mode of study for BTEC qualifications. Centres are free to offer the qualifications using any mode of delivery that meets the needs of their learners. This may be through traditional classroom teaching, open learning, distance learning or a combination of these. Whatever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specifications and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. Those planning the programme should aim to enhance the vocational nature of the BTEC qualifications by:

- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and,
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

BTEC qualifications are designed to prepare learners for employment in specific sectors. Physical resources need to support the delivery of the programme and the proper assessment of the outcomes and therefore should normally be of industry standard. Staff delivering programmes and conducting the assessments should be fully familiar with current practice and standards in the sector concerned. Centres will need to meet any specialist resource requirements when they seek approval from Edexcel.

Resources for the Level 3 BTEC Certificate in Customer Service should include research facilities such as the internet and relevant trade publications (for example, *Customer First* published by the Institute of Customer Service).

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the specialist vocational nature of the Level 3 BTEC Certificate in Customer Service. Tutors and assessors need to ensure that the knowledge base is applied to the sector. This will require the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of the learner's experience.

As the qualification has been designated and approved as a Technical Certificate and forms part of an Advanced Apprenticeship scheme, particular care needs to be taken to build strong links between the learning and assessment for this Level 3 BTEC Certificate and the NVQs and key skills that also contribute to the scheme.

Centres should note that the qualification set out in this specification has been developed in consultation with centres and employers, particularly the Institute of Customer Service. The units are designed to meet the skill needs of the sector and to lead to or support employment within the sector.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- the qualifications should be available to everyone who is capable of reaching the required standards
- the qualifications should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should also show regard for Edexcel's policy on learners with particular requirements.

Centres will need to review the profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a Level 3 qualification. For learners who have recently been in education, the profile is likely to include one of the following:

- a standard of literacy and numeracy supported by a general education equivalent to GCSEs at grade A*-C
- related work experience
- other related Level 2 qualifications.

More mature learners may present a more varied profile of achievement that is likely to include experience of paid and/or unpaid employment.

Restrictions on learner entry

The Edexcel Level 3 BTEC Certificate in Customer Service is accredited on the NQF for learners aged 16 years and over. Learners aged 15 and under cannot be registered for this qualification.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Disability Discrimination Act 1995 and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications, which is on the Edexcel website (www.edexcel.com). This policy replaces the previous Edexcel policy (Assessment of Vocationally Related Qualification: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

Key skills

All BTEC Short Courses include signposting of key skills. These are transferable skills which play an essential role in developing personal effectiveness for adult and working life and in the application of specific vocational skills.

In each unit, the opportunities for the generation of evidence for key skills are signposted. These are indicative links only. Staff will need to become familiar with key skills specifications and their evidence requirements and they are advised not to rely on the signposting in the units when presenting key skills evidence for moderation. Centres should refer to the QCA website (www.qca.org.uk) for the latest key skills standards.

Key skills provide a foundation for continual learning. They enable and empower individuals who inevitably face a series of choices in work, education and training throughout their lives. Current and future initiatives such as learndirect, lifelong learning, and widening participation all require a more flexible population in the workplace and key skills play a role in setting the framework.

Learners need the chance to show current and future employers that they can:

- communicate effectively, in a variety of situations, using a wide range of techniques
- work well with others – individuals or teams – so that work can be properly planned and targets met
- manage their own development, so that they are always ready to take on the challenges of change and diversification
- use numeracy, not just within routine tasks and functions but to help them be more effective and efficient in all they do
- use ICT in a range of applications to support all aspects of their role
- solve problems in a variety of circumstances.

The wider curriculum

The study of the Level 3 BTEC Certificate in Customer Service provides opportunities for the learner to develop an understanding of spiritual, moral, ethical, social and cultural issues and an awareness of environmental issues, health and safety considerations, and European developments. These wider curriculum opportunities are indicated in the units as appropriate.

Spiritual, moral, ethical, social and cultural issues

The specification gives learners opportunities to develop an understanding of:

- **moral and ethical issues** through considering the ethics base of organisations; types of customer service offer; the legislation affecting customer service delivery
- **social and cultural issues** through considering different types of customer service offer, customer service delivery and how to communicate with customers.

Environmental, health and safety issues and European developments

The specification gives learners opportunities to develop an understanding of:

- **environmental issues** through considering the ethical and values base of organisations
- **health and safety issues** through considering health and safety legislation.

Useful publications

Further copies of this document and related publications can be obtained from:

Edexcel Publications

Adamsway

Mansfield

Nottinghamshire NG18 4FN

Telephone: 01623 467 467

Fax: 01623 450 481

Email: publications@linneydirect.com

Related publications include:

- Centre Guidance for Online Tests: Edexcel Level 2 BTEC Certificate in Business Administration — available on our website: www.edexcel.com
- Centre Handbook: Delivery and Quality Assurance for BTEC Qualifications with External Tests — available on our website
- the current Edexcel publications catalogue and update catalogue
- key skills publications — specifications, tutor support materials and question papers

- Accreditation of Prior Learning – available on our website
- *The Statutory Regulation of External Qualifications in England, Wales and Northern Ireland* (QCA, 2004).

Edexcel publications on the Quality Assurance System and on-screen objective testing of vocationally related programmes can be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Most of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

National Occupational Standards for Customer Service are available from:

The Institute of Customer Service

Telephone: 01206 571716

Fax: 01206 546688

Email: enquiries@icsmail.co.uk

Website: www.instituteofcustomerservice.com

Professional development and training

Edexcel supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building key skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DIDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

The training we provide:

- is active — ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training will also underpin many areas of the LLUK standards for teachers working towards them.

Further information

Edexcel produces regular policy statements on Edexcel qualifications and accompanying procedures. Please check our website for current information.

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for training purposes) or visit our website at www.edexcel.com

Units

Unit 1: Principles of Customer Service Delivery and Development

NQF Level 3

Guided learning hours: 40

Unit abstract

This unit reviews how organisations have developed an approach to and terminology for customer service that are recognised and understood as the basic principles for service excellence.

Learners will consider the way in which organisations of different types plan and build a customer service offer. They will learn about the similarities and differences in approaches operated by both profit and non-profit making organisations. Learners will explore the range of factors that organisations need to consider when planning their customer service offer, including the financial and resource constraints within which the offer must be designed, the need to balance overall organisational goals (such as to make a profit) with a high-quality customer service offer, and the organisation's ethics and values base. Learners will then look at the way in which a customer service offer is influenced by the customer service base, including customer expectations and any data or knowledge relating to customers collected by the organisation.

Learners will explore what constitutes good-quality customer service delivery and how to achieve it, in particular the value of effective communication and teamwork. They will also learn how effective customer service results in high levels of customer satisfaction and why this is important to an organisation. Learners will consider how a culture of continuous review and improvement contributes to maintaining high standards. They will learn about benchmarking and comparing a customer service offer against that of rival organisations in order to add value and gain a competitive edge.

Learning outcomes

On completion of this unit a learner should:

- 1 Understand how organisations plan and build a customer service offer
- 2 Understand how customer service can provide a competitive advantage for or add value to an organisation
- 3 Understand how effective delivery of customer service contributes to customer satisfaction.

Unit content

1 Understand how organisations plan and build a customer service offer

The customer service offer: definition — the extent and limits of the customer service offered by an organisation; determined by price and service offer of competitors; aiming to be over and above what an organisation would usually do (friendly service, money back if goods returned, call back in 24 hours, next-day delivery, dedicated helpline, set queuing times); definition of customer service promise (several customer service offers packaged together)

The customer service base: customer needs, desires; customer expectations formed by what they hear, see, read, what organisation tells them through advertising, promotional campaigns, their customer service experience, past experiences

Key factors: organisational aim (to make a profit), organisational objectives (to break even, increase market share, increase size of organisation, update products, develop new products, keep customers happy); the need to balance customer expectations and needs with organisational aims and objectives; the service chain (the need to ensure that several services are integrated to meet customer needs — production, finance, marketing, selling, logistics, customer service)

Finance and resource limitations within which offer must operate: cost (overheads, resources required to manufacture product, staff salaries); resources (raw materials to manufacture product, staff to meet demand in producing product, staff providing services such as taking orders, delivery, dedicated customer service staff); working conditions (EU labour regulations and transit workers, national pay rates); organisation structures (scope of job role, working conditions, rotas, holidays, sickness)

Ethical and values base of organisations: sourcing raw materials, products, saving carbon emissions in delivery, paying fair wage to employees, not exploiting employees, not exploiting customers or suppliers in poor communities/countries; using ethics base as part of customer service promise (eg only free-range eggs/meat used, no animal testing, materials sourced ethically); danger of adverse publicity if organisation does not behave ethically leading to reduction in customers

Customer service offer of private-sector organisations: aim (to increase profit, to grow market share); customer service offer (may include a range of products/services, price reduction, sales, special offers, longer opening hours, dedicated customer service staff)

Customer service offer of not-for-profit and voluntary-sector organisations: aim (to make money for charitable use or to provide a service; to continue to fund activities); customer service offers (may include a range of products/services to benefit the community, ethically sourced products/services, price reductions)

Customer service offer of public-sector organisations: aim (to provide services to the community); customer service offer (may include benefits or support to the community, eg within education, further education colleges offering wide range of courses for different people, evening classes; within leisure, publicly run leisure centres offering wide range of sports facilities, special clubs for people of different needs, ages, evening opening; within the health sector, doctors' surgeries offering early/late appointments, treatment at home, counselling)

2 Understand how customer service can provide a competitive advantage or add value to an organisation

Competitive advantage: motivating staff (providing resources in support of customer service, recognition and reward, training and development); exceeding customer expectations in level of service offered (in providing value for money, extra services — free delivery, dedicated help line, follow-up service); methods of comparing an organisation's customer service offer with that of competitors (gathering information through published data, eg Comparison.com); reasons for comparing (to introduce similar measures, to seek to surpass them); achieving and sustaining competitive advantage; unique selling points

Added value: providing value for money; keeping customers up to date with new products and services; going beyond a basic satisfactory level of service; providing more than customer was expecting

Benchmarking: the benchmarks available (Customer Service National Occupational Standards, service offers of competitor organisations); reasons for benchmarking (keeping up to date, Kite Marking™, identifying areas of weakness, target setting for improvements, developments)

Continuous improvement: purpose (to consistently keep ahead of competitors by providing better customer service); gathering and analysing information from customers and colleagues; customer research techniques (informal feedback, eg customer comments; formal feedback, eg questionnaires, comment cards, focus groups, compliment/complaint letters); balancing customer satisfaction with cost of providing service and regulatory requirements

3 Understand how effective delivery of customer service contributes to customer satisfaction

Customer satisfaction: matching or surpassing customer needs/expectations; providing a personal service; staff knowledge and understanding of organisation's products and services; providing accurate information

Communication: ability to communicate with diverse group of customers; methods of communication (face to face, telephone, email, text message, writing); different groups of customers (customers of different ages, different cultures, individuals, families); customers with particular needs (English not first language, visual difficulties, hearing difficulties); techniques to ascertain customer needs (questioning, listening, clarifying); the need to provide clear, accurate information

Behaviour: customer service deliverer (calm, polite manner, tone of voice, pitch, listening, body language, appropriateness to situation); dealing with different customer behaviour, personalities; how the behaviour of the service deliverer can affect the customer service experience

Teamwork: ensuring each member of the team carries out their own role in providing customer service (providing information, providing resources, developing products, producing products, collecting and delivering products at set times); service partnership (when two organisations or departments in same organisation combine to provide effective customer service – encourages teamwork and cooperation)

Review of systems: to bring about improvements; customer profiling, customer research techniques (informal customer feedback, customer questionnaires, comment cards, staff feedback, mystery customers); complaint/compliment letters; evaluating feedback, level of sales, repeat customers, new customers, level of complaints, staff turnover; planning for change in competitive environment (improvements to quality of service, reliability, keeping staff by improving job satisfaction, working environment, attracting new customers, increasing turnover, complying with legal obligations)

Assessment – indicative assessment statements

The Assessment guidance section on page 7 shows the types and weighting of test questions. The indicative assessment statements against each learning outcome show the types of questions that may be set. They are not definitive; questions may be set against any part of the obligatory content.

Learning outcomes	Indicative assessment statements Examples of indicative assessment statements which test questions may cover
1 Understand how organisations plan and build a customer service offer	<ul style="list-style-type: none">• Define a customer service offer• Explain what determines the customer service offer• Identify the factors which determine the customer service offer• Describe the key factors an organisation would take into account when planning its customer service offer• Define the customer service chain• Identify the financial and resource limitations within which a customer service offer must operate• Identify the customer service base• Explain how customer expectations are formed• Explain how the ethics and values base of an organisation can affect its approach to customer service• Describe the customer service offer of a private organisation• Describe the customer service offer of a not-for-profit/voluntary organisation• Describe the customer service offer of a public service organisation• Explain why customer service offers differ between different types of organisation

Learning outcomes	Indicative assessment statements Examples of indicative assessment statements which test questions may cover
2 Understand how customer service can provide a competitive advantage for or add value to an organisation	<ul style="list-style-type: none"> • Explain how an organisation can gain competitive advantage • Describe how an organisation can motivate its staff • Describe how an organisation can exceed customer expectations • Explain why an organisation might compare its service offer with that of competitors • Explain how an organisation could provide added value for customers • Explain why an organisation would benchmark its customer service • Explain why organisations continually strive to improve customer service • Identify types of customer feedback
3 Understand how effective delivery of customer service contributes to customer satisfaction	<ul style="list-style-type: none"> • Explain how an organisation can provide customer satisfaction • Explain the importance of communication in delivering customer service • Identify different methods of communication used with customers • Identify different types of customers • Identify particular needs customers might have • Explain techniques to ascertain customer needs • Describe the type of behaviour appropriate for the delivery of customer service • Explain how the behaviour of the service deliverer can affect the customer service experience • Explain the importance of effective teamwork in providing customer service • Explain why an organisation may review its systems for delivering customer service

Essential guidance for tutors

Delivery

The focus of this unit is on how organisations build a customer service offer to gain competitive advantage and ensure customer satisfaction.

These principles can be explored through discussion and it would be beneficial if the learners could link these discussions to their own experiences. If learners have little experience of work then use should be made of visits, work placements, job shadowing, team activities, group projects or learners' experience of teamwork which may have been gained from part-time employment or social activities.

Case-study material would also be useful to help the learners to develop an understanding of the content of the unit.

For learning outcome 3, learners could use role play to practise communicating and working as a team. Learners could practise scenarios to illustrate customer service delivery, one taking the part of the customer, the other the part of the customer service professional.

Assessment

See *Assessment guidance* on page 7.

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit links with the Level 3 NVQ in Customer Service, in particular *Unit 7: Understand customer service to improve service delivery*, *Unit 13: Make customer service personal* and *Unit 14: Go the extra mile in customer service*.

Essential resources

There are no essential resources for this unit.

Indicative reading for learners

Boden A — *The Handling Complaints Pocketbook* (Management Pocketbooks, 2002)
ISBN 1870471911

Hayes J and Dredge F — *Managing Customer Service* (Gower Publishing, 1998)
ISBN 0566080052

Leland K and Bailey K — *Customer Service for Dummies* (John Wiley & Sons, 2006)
ISBN 0471768693

Journal

Customer First (Institute of Customer Service)

Website

www.instituteofcustomerservice.com

Key skills

Achievement of key skills is not a requirement of this qualification but it is encouraged. Suggestions of opportunities for the generation of Level 3 key skills evidence during the delivery of the qualification are given here. Tutors should check that learners have produced all the evidence required by part B of the key skills specifications when assessing this evidence. Learners may need to develop additional evidence elsewhere to fully meet the requirements of the key skills specifications.

Communication Level 3	
When learners are	They should be able to develop the following key skills evidence:
<ul style="list-style-type: none">discussing how organisations plan and build a customer service offer; how customer service provides a competitive advantage to an organisation; how customer service contributes to customer satisfactionreading customer service offers, customer letters, benchmarks such as customer service National Occupational Standardspractising communicating with customers in writing.	<p>C3.1a Take part in a group discussion.</p> <p>C3.1b Make a formal presentation of at least eight minutes using an image or other support material.</p> <p>C3.2 Read and synthesise information from at least two documents about the same subject. Each document must be a minimum of 1000 words long.</p> <p>C3.3 Write two different types of documents, each one giving different information about complex subjects. One document must be at least 1000 words long.</p>
Improving own learning and performance Level 3	
When learners are:	They should be able to develop the following key skills evidence:
<ul style="list-style-type: none">discussing improvements to customer service.	<p>LP.3.1 Set targets using information from appropriate people and plan how these will be met.</p>
Problem solving Level 3	
When learners are:	They should be able to develop the following key skills evidence:
<ul style="list-style-type: none">discussing improvements to customer service.	<p>PS.3.1 Explore a problem and identify different ways of tackling it.</p>

Working with others Level 3	
When learners are:	They should be able to develop the following key skills evidence:
<ul style="list-style-type: none"> discussing improvements to customer service. 	W03.1 Plan work with others.

Unit 2: Knowing the Rules to Follow When Developing Customer Service

NQF Level 3

Guided learning hours: 50

Unit abstract

This unit focuses on the planning, development and improvement of a customer service offer. Learners will explore the framework of rules, including organisational policies and procedures, key legislation and regulatory requirements, in which customer service professionals operate. They will consider how organisational policies can help ensure that any developments are consistent with overall organisational methods, aims and values. Learners will also learn why it is important to act within the limits of their own authority.

Learners will review relevant legislation to identify how it affects customer service development, including legislation relating to consumer protection, data protection, equal opportunities, diversity and inclusion and health and safety. Learners will explore how organisations have to balance their own needs and objectives with key legal or regulatory requirements, even when these may conflict.

Learners will consider the different ways customer service professionals work with others in their organisation to plan and implement improvements and developments. They will identify how and why certain individuals or groups should be involved and in what capacity.

Learning outcomes

On completion of this unit a learner should:

- 1 Understand why it is important to take into account organisational policies and procedures when developing customer service
- 2 Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments
- 3 Understand how and why an individual's authority to plan or implement change is limited
- 4 Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
- 5 Understand how organisations balance legal and regulatory requirements against their own needs and objectives when developing customer service.

Unit content

1 Understand why it is important to take into account organisational policies and procedures when developing customer service

Role of organisational policies and procedures: purpose – to ensure consistency with organisational practice, aims, goals, values; helping to keep within restrictions set by legislation and regulatory bodies where they exist (to ensure legislation/regulation complied with); helping organisations surpass minimum requirements and adding value to offer competitive advantage (eg quality products, value for money, speed of service); protecting individuals in potentially vulnerable circumstances (referring difficult customers to senior staff, procedures regarding health and safety, security of information)

Types of organisational procedure: staff training; customer research; handling customer queries; handling customer complaints; keeping customer records; updating customers; procedures for improving products/services; procedures for introducing new products/services; pricing strategies; communication within organisation; completing financial transactions

External regulations: key regulated industries (eg health and social care; education; finance; transport; telecommunications); regulatory organisations (eg Ofsted, Ofqual, Financial Services Authority, Office of Rail Regulator, Ofcom); role of regulations (eg setting standards, ensuring parity across sector, ensuring range of services offered, consumer protection, health and safety)

2 Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments

Purpose: to ensure changes made comply with aims and objectives of business (eg to provide service, grow profit, increase market share); to ensure agreement regarding provision of necessary resources (eg finance, staff)

Involving others: deciding who to involve – internal colleagues (own team, line manager, department, those in other departments)

How to involve others: giving authority, consulting, informing, changing management, whole staff buy-in

3 Understand how and why an individual's authority to plan or implement change is limited

Types of change: changes to products/services offered; changes in availability of product/service; changes to price; changes to procedures dealing with customer queries, complaints; organisation restructures, changes in employee roles, changes to number of staff employed (eg to sell/deliver product service)

Limits of individual authority to develop or change practices: reasons for limits of authority; checking for consistency with overall organisation aims, values, corporate or collective responsibility, checking for consistency with legislation/regulatory requirements, checking financial and other resources; implications; need for management buy-in

Implementing change: protocols and procedures for changing practices within organisations (communicating changes and proposals, telling, selling and involving colleagues when introducing change, writing reports and submissions on proposals, reviewing and evaluating within a programme for change)

4 Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service

Equal opportunities and discrimination: recognising diversity, treating everyone equally, race, colour and creed, Race Relations Act 1976 — unlawful to treat a person less favourably than others on racial grounds (race, colour, nationality, national or ethnic origin); employment legislation — illegal to treat an employee less favourably on grounds of marital status, religion, belief, sexual orientation, gender reassignment, disability; Disability Discrimination Act (DDA), gives disabled people rights in areas of employment, education, access to goods, facilities and services, buying or renting land or property; public bodies must promote equality of opportunity for disabled people; minimum standards for use of public transport; importance of reasonable adjustments for access and amenities (varies according to type, size, age of organisation)

Data Protection Act 1998 and confidentiality: Data Protection Act lays down principles for those handling personal information; information must be fairly and lawfully processed; processed for limited purposes; adequate, relevant, not excessive; accurate and up to date; not kept for longer than necessary; processed in line with rights; secure; not transferred to other countries without adequate protection; the right of individuals to find out what personal information is found about them on computer and paper records

Health and safety: health and safety within the organisation, rules that govern health and safety within the job role, balancing cost of health and safety legislation and an organisation's objectives; Health and Safety at Work Act — employers must maintain workplace, machinery and ensure equipment is safe and without risk to health; provide training to employees to carry out work safely; keep the environment safe; keep work areas safe (eg access to and from); each organisation to have written safety policy; to consult with safety reps of trade union or establish safety committee (varies according to number of employees)

Trade Descriptions Act 1968: any descriptions of goods and services (including verbally, in writing, eg advertisement, packaging, or implication) given by a person acting in the course of trade or business should be accurate and not misleading; descriptions include quantity, size, gauge; method of manufacture; composition; fitness for purpose; physical characteristics; results of testing; place or date of manufacture; person by whom manufactured; previous ownership or use

Sale of Goods Act 1979: wherever goods are bought it is the responsibility of the seller to ensure they must be as described, fit for purpose, of satisfactory quality (free from minor defects, appearance and finish, durability and safety); if goods do not conform to contract, purchasers can request money back within a reasonable time

Supply of Goods and Services Act 1982: supplier of service must carry out that service with reasonable care and skill, within reasonable time, and make reasonable charge; strict limits on circumstances in which an exclusion or variation will be effective; if conditions of contract are breached, consumer can claim compensation or cancel contract; any goods supplied must be as described, of satisfactory quality, fit for purpose; if not consumer is entitled to repair, replacement or compensation

Consumer Protection Act 1987: strict liability on producers for harm caused by defective products; people injured by defective products can sue for compensation without having to prove producer negligent, provided they can prove the product was defective and the defect in the product caused the injury

Distance Selling Regulations 2000: if goods or services sold via the internet, digital television, mail order, phone or fax, seller must give consumer clear prior information in writing including details of good(s) or service(s) offered, delivery arrangements and payment, supplier's details and consumer's cancellation right before they buy; consumer has cooling-off period of seven days

5 Understand how organisations balance legal and regulatory requirements against their own needs and objectives when developing customer service

Needs and objectives of organisation: needs (to break even, make a profit, stay in business); objectives (to grow profit, to increase market share, to target new market sectors); possible areas of conflict with legislation (the need to invest in materials, premises, staff; in order to provide quality, safe products/services)

Ensuring goods are of advertised quality and description: investing in correct raw materials; skilled production staff; training staff to know own job roles

Staffing: ensuring sufficient staff are employed to meet customer demand (to provide products/services, to carry out additional services such as call back at particular time, delivery times, as stated in customer service offer), providing staff training in relevant aspects of legislation

Facilities: ensuring premises meet health and safety requirements; ensuring premises meet DDA requirements in providing access

Clear information for customers: providing clear written procedures for returning goods if not satisfied; claiming money back; claiming compensation; claiming replacement goods; cooling-off period

Assessment – indicative assessment statements

The *Assessment guidance* section on page 7 shows the types and weighting of test questions. The indicative assessment statements against each learning outcome show the types of questions that may be set. They are not definitive; questions may be set against any part of the obligatory content.

Learning outcomes	Indicative assessment statements Examples of indicative assessment statements which test questions may cover
1 Understand why it is important to take into account organisational policies and procedures when developing customer service	<ul style="list-style-type: none">• Identify the purpose of organisational procedures• Explain how surpassing minimum requirements can add value for customers• Explain how procedures can help an organisation to gain competitive advantage• Explain how procedures can protect individuals• Explain why procedures may be needed with regard to legislation• Identify areas which may be subject to organisational procedures
2 Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments	<ul style="list-style-type: none">• Explain why a customer service professional has to involve others when planning improvements• Identify the types of areas which need to be agreed when planning improvements• Identify who else should be involved when planning improvements• Explain how you would decide who else to involve• Describe the different ways other members of staff could be involved in planning change• Explain how you would go about involving others in planning and implementing improvements

Learning outcomes	Indicative assessment statements Examples of indicative assessment statements which test questions may cover
3 Understand how and why an individual's authority to plan or implement change is limited	<ul style="list-style-type: none"> • Identify the types of change which may affect customer service • Explain why individual authority to develop or change practices is limited • Explain why the organisation's aims need to be considered when planning change • Explain why legislation needs to be considered when planning change • Explain why the availability of resources needs to be considered when planning change • Explain why the implementation of procedures necessary when planning change • Identify the types of procedures for implementing change
4 Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service	<ul style="list-style-type: none"> • Identify the main legislation and regulatory requirements relating to: <ul style="list-style-type: none"> - equal opportunities and discrimination - data protection - health and safety - consumer protection • Explain how key legislation and regulatory requirements are taken into account when developing customer service including: <ul style="list-style-type: none"> - equal opportunities and discrimination - data protection - health and safety - consumer protection

Learning outcomes	Indicative assessment statements Examples of indicative assessment statements which test questions may cover
<p>5 Understand how organisations balance legal and regulatory requirements against their own needs and objectives when developing customer service</p>	<ul style="list-style-type: none"> • Explain how an organisation's needs and objectives may conflict with legal and regulatory requirements • Explain how an organisation would ensure goods are of advertised quality and description • Explain staffing considerations in relation to legal and regulatory requirements • Identify the legal requirements that an organisation's facilities should meet in relation to health and safety • Identify the types of information customers may need in relation to consumer protection legislation

Essential guidance for tutors

Delivery

Learners who are already working in customer service may be able to apply the principles contained within the outcomes to their organisations. Learners without this type of experience will need to use contacts with organisations or suitable case studies to develop the necessary understanding. Alternatively, learners could visit organisations to see how their customer service departments work, or visiting speakers could explain how legislation and procedures impact on developing customer service.

Learners could research the information needed for learning outcome 4 using suitable websites and present the results of their research to their fellow learners.

Assessment

See *Assessment guidance* on page 7.

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit links with the Level 3 NVQ in Customer Service, in particular *Unit 8: Know the rules to follow when developing customer service*, *Unit 23: Recognise diversity when delivering customer service*, *Unit 26: Improve the customer relationship*, *Unit 33: Apply risk assessment to customer service*, *Unit 39: Work with others to improve customer service* and *Unit 40: Promote continuous improvement in customer service*.

Essential resources

There are no essential resources for this unit.

Indicative reading for learners

Boden A — *The Handling Complaints Pocketbook* (Management Pocketbooks, 2002)
ISBN 1870471911

Hayes J and Dredge F — *Managing Customer Service* (Gower Publishing, 1998)
ISBN 0566080052

Leland K and Bailey K — *Customer Service for Dummies* (John Wiley & Sons, 2006)
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Journal

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Key skills

Achievement of key skills is not a requirement of this qualification but it is encouraged. Suggestions of opportunities for the generation of Level 3 key skills evidence during the delivery of the course are given here. Tutors should check that learners have produced all the evidence required by part B of the key skills specifications when assessing this evidence. Learners may need to develop additional evidence elsewhere to fully meet the requirements of the key skills specifications.

Level 3 Communication	
When learners are:	They should be able to develop the following key skills evidence:
<ul style="list-style-type: none">• discussing how to involve others when implementing change to customer service; how organisations balance legal and regulatory requirements against own needs and objectives• reading organisational policies and procedures and key legislation• communicating proposals for change.	<p>C3.1a Take part in a group discussion.</p> <p>C3.1b Make a formal presentation of at least eight minutes using an image or other support material.</p> <p>C3.2 Read and synthesise information from at least two documents about the same subject. Each document must be a minimum of 1000 words long.</p> <p>C3.3 Write two different types of documents, each one giving different information about complex subjects. One document must be at least 1000 words long.</p>

Annexe A

QCA codes

The QCA National Qualifications Framework (NQF) code is known as a Qualification Accreditation Number (QAN). This is the code that features in the DfES Funding Schedules, Section 96 and Section 97, and is to be used for all qualification funding purposes. Each unit within a qualification will also have a QCA NQF unit code.

The QCA qualification and unit codes will appear on the learner's final certification documentation.

The QAN for the qualification in this publication is:

500/3954/4

Edexcel Level 3 BTEC Certificate in Customer Service

Annexe B

Mapping with NVQs

The grid below maps the knowledge covered in the Edexcel Level 3 BTEC Certificate in Customer Service against the underpinning knowledge of the Level 3 NVQ in Customer Service.

KEY

- ✓ indicates that the Edexcel Level 3 BTEC Certificate in Customer Service covers parts of the underpinning knowledge of relevant NVQ units

Level 3 NVQ in Customer Service	Edexcel unit	
	1	2
Unit 7: Understand customer service to improve service delivery	✓	
Unit 8: Know the rules to follow when developing customer service		✓
Unit 13: Make customer service personal	✓	
Unit 14: Go the extra mile in customer service	✓	
Unit 15: Deal with customers in writing or using ICT		
Unit 18: Use customer service as a competitive tool		
Unit 19: Organise the promotion of services or products to customers		
Unit 22: Deliver customer service on your customers' premises		
Unit 23: Recognise diversity when delivering customer service		✓
Unit 24: Deliver customer service using service partners		
Unit 25: Organise the delivery of reliable customer service		
Unit 26: Improve the customer relationship		✓
Unit 32: Monitor and solve customer service problems		
Unit 33: Apply risk assessment to customer service		✓
Unit 34: Process customer service complaints		
Unit 39: Work with others to improve customer service		✓
Unit 40: Promote continuous improvement in customer service		✓
Unit 41: Develop your own and others' customer service skills		
Unit 42: Lead a team to improve customer service		
Unit 43: Gather, analyse and interpret customer feedback		

Annexe C

Edexcel Level 3 BTEC Certificate in Customer Service

Technical Certificate mapping

NVQ Knowledge and understanding	Edexcel Level 3 BTEC Certificate in Customer Service
Unit 7	
7.1 Use accepted customer service language and apply its principles	
7.1.1 explain how your organisation builds a service offer that will meet customer expectations	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.2 describe how the service offer is affected by financial and other resource limitations	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.3 describe what effects the service offer may have on the service chain	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.4 give examples of how customers may form their expectations of the services or products	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.5 explain the importance of effective teamwork and service partnerships for the delivery of excellent customer service	Unit 1, learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.1.6 give examples of the similarities and differences in planning customer service offers for the commercial, public sector and private sector not-for-profit organisations	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.7 explain how customer service can provide added value to a public sector or private sector not-for profit organisation	Unit 1, learning outcome 2: Understand how customer service can provide a competitive advantage for or add value to an organisation
7.1.8 explain how customer service can provide a competitive advantage for a commercial organisation	Unit 1, learning outcome 2: Understand how customer service can provide a competitive advantage for or add value to an organisation

Unit 7 (continued)	
7.1.9 explain why your organisation must limit the level of customer service it gives in order to balance customer satisfaction with organisational goals	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.1.10 explain how your behaviour and the behaviour of customers can influence the level of customer satisfaction achieved	Unit 1, learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.1.11 give positive examples of how you deal with different customer behaviours and personalities when managing problems and complaints	Unit 1, learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.1.12 explain the importance of effective communication in the delivery of excellent customer service	Unit 1, learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.1.13 give examples of how you ensure that communication with diverse groups of customers is effective and efficient	Unit 1, learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.1.14 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	Unit 1, learning outcome 2: Understand how customer service can provide a competitive advantage for or add value to an organisation
7.2 Place customer service principles in context for your professional customer service role	
7.2.1 give examples of approaches different sectors may take to customer service	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.2.2 explain your organisation's policies and procedures for the delivery of services or products and why it is important to follow them	Unit 2, learning outcome 1: Understand why it is important to take into account organisational policies and procedures when developing customer service
7.2.3 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	Unit 1, learning outcome 2: Understand how customer service can provide a competitive for or add value to an organisation

Unit 7 (continued)	
7.2.4 give examples of the essential features and benefits of your organisation's services or products that influence customer service delivery and satisfaction	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer. Unit 1, Learning outcome 3: Understand how effective delivery of customer service contributes to customer satisfaction
7.2.5 describe how your organisation balances its needs with customer expectations and needs	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
7.2.6 explain the ethical and values base of your organisation's approach to customer service	Unit 1, learning outcome 1: Understand how organisations plan and build a customer service offer
Unit 8	
8.1 Develop customer service following organisational rules and procedures	
8.1.1 describe organisational policies and procedures that you would need to take into account to propose improvements or developments to customer service	Unit 2, learning outcome 1: Understand why it is important to take into account organisational policies and procedures when developing customer service
8.1.2 describe how you would obtain authorisation to change customer service practices	Unit 2, learning outcome 2: Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments
8.1.3 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	Unit 2, learning outcome 2: Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments
8.1.4 explain how you would involve colleagues or service partners in the implementation of improvements or changes	Unit 2, learning outcome 2: Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments Learning outcome 3: Understand how and why an individual's authority to plan or implement change is limited.

Unit 8 (<i>continued</i>)	
8.2 Develop customer service following external regulation and legislation	
8.2.1 explain relevant regulation and legislation relating to consumer protection	Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
8.2.2 describe relevant regulations and legislation relating to data protection	Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
8.2.3 explain relevant regulations and legislation relating to disability discrimination and equal opportunities	Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
8.2.4 explain relevant regulations and legislation relating to diversity and inclusion and discrimination for reasons other than disability	Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
8.2.5 explain relevant regulations and legislation relating to health and safety of customers and colleagues	Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service
8.2.6 explain the need to balance the requirements of regulations with the needs and objectives of your organisation	Unit 2, learning outcome 5: Understand how organisations balance legal and regulatory requirements against their own needs and objectives when developing customer service
8.2.7 describe how you would incorporate relevant regulations and legislation when planning and implementing improvements and developments	<p>Unit 2, learning outcome 2: Understand why a customer service professional might need to involve other members of their organisation when planning and implementing improvements and developments</p> <p>Unit 2, learning outcome 4: Understand the significance of key legislation and any regulatory requirements to be taken into account when developing customer service</p> <p>Unit 2, learning outcome 5: Understand how organisations balance legal and regulatory requirements against their own needs and objectives when developing customer service</p>

Annexe D

Mapping with key skills

Key skill	Unit 1	Unit 2
C3.1a	✓	✓
C3.1b	✓	✓
C3.2	✓	✓
C3.3	✓	✓
N3.1		
N3.2		
N3.3		
ICT3.1		
ICT3.2		
ICT3.3		
LP3.1	✓	
LP3.2		
LP3.3		
PS3.1	✓	
PS3.2		
PS3.3		
WO3.1	✓	
WO3.2		
WO3.3		

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