

Unit 55: Understand Working in a Customer Service Environment

Unit reference number: L/506/2083

QCF level: 1

Credit value: 3

Guided learning hours: 25

Unit type: Knowledge

Unit summary

This unit addresses what good customer service means and why it is so important to the success of an organisation. You will learn about the different types of customer that organisations deal with, how to identify and meet their different needs and, wherever possible, strive to exceed their expectations.

Working effectively in a customer service role is key to the overall success of a business and you will learn about the standards you have to work towards to offer effective customer service. You will learn about current legislative, regulatory and organisational requirements and understand how your personal behaviours and presentation affect your role in a customer service environment.

You will learn how to identify dissatisfied customers, how to resolve the issues within the limits of your responsibility and to whom you report and refer customer complaints and related issues.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria
1 Know the importance of customer service	1.1 State what is meant by "customer service" 1.2 State why effective customer service is important to an organisation
2 Know the factors affecting customer service	2.1 Outline the difference between an internal and an external customer 2.2 State how to identify customers' needs and expectations 2.3 List information sources needed to deliver reliable customer service 2.4 Describe the relationship between customer expectations and customer satisfaction
3 Know how to work in a customer service role	3.1 Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services 3.2 Identify the job roles within a team delivering customer service 3.3 State the standards of personal presentation and behaviour expected by customer service staff in different organisations 3.4 State standards and practices that relate to a service offer within different types of organisation 3.5 Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role 3.6 Describe the procedures for protecting customers' personal information and safety 3.7 State the importance of protecting customers' personal information and safety

Learning outcomes	Assessment criteria
<p>4 Know how to refer customer queries and problems to others</p>	<p>4.1 Describe types of customer behaviour that show when a customer is dissatisfied</p> <p>4.2 State the procedures to be followed when dealing with customer queries or problems</p> <p>4.3 State to whom to refer customer queries and problems</p>

Unit amplification

AC1.1: State what is meant by “customer service”

- *Customer service:* the service provided to customers in relation to goods or services purchased, used or obtained to meet customer needs and expectations

AC1.2: State why effective customer service is important to an organisation

- *Importance to an organisation:* encourages repeat business; improves organisation’s reputation and image; improves customer confidence in dealing with organisation; increases customer satisfaction

AC2.1: Outline the difference between an internal and an external customer

- *Internal customers:* working within the organisation (colleagues, supervisors, staff working in other departments); working with the organisation (manufacturers, suppliers, distributors)
- *External customers:* outside the organisation (customers obtaining or paying for goods and/or services)

AC2.2: State how to identify customers’ needs and expectations

- *Needs:* customers’ requirements of the product or service (features, benefits, specific functions)
- *Expectations:* customers’ ideas of how the product or service will meet their needs (realistic, unrealistic)
- *Identifying customers’ needs:* asking questions, e.g. open, closed, leading, questionnaires, surveys, focus groups; observing body language

AC2.3: List information sources needed to deliver reliable customer service

- *Information sources:* staff working in same organisation, e.g. manager, supervisor, those with specialist knowledge; external, e.g. suppliers, sales representatives, regulators; records, e.g. sales history, customer information; product information, e.g. sales literature, specifications

AC2.4: Describe the relationship between customer expectations and customer satisfaction

- *Customer expectations:* customers' ideas of how the product or service will meet their needs (realistic, unrealistic)
- *Customer satisfaction:* customers' opinions of how the product or service meets or exceeds their needs after purchasing goods or using services (happy, value for money, quality, fit for purpose)
- *Relationship:* customer satisfaction is dependent on how realistic customer expectations are; if customer expectations are unrealistic, the organisation may never satisfy customers even if their products or services reach a high standard

AC3.1: Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services

- *Personal behaviours:* positive attitudes (polite, friendly, approachable, knowledgeable); negative attitudes (rude, impatient, careless)
- *Customer perceptions:* individual views and opinions of the organisation and the quality of products and services

AC3.2: Identify the job roles within a team delivering customer service

- *Job roles:* e.g. managers/supervisors (handling and resolving complaints, ensuring organisational targets are met, managing teams), sales assistants (attracting sales, retaining customers, providing after sales support), receptionists (greeting customers/visitors, answering queries), administrators (answering and resolving queries/complaints, processing orders, recording customers' use of service and sales history)

AC3.3: State the standards of personal presentation and behaviour expected by customer service staff in different organisations

- *Standard of personal presentation:* business clothing (smart, clean, professional, minimal jewellery); good standard of personal hygiene, e.g. clean and brushed hair, clean and filed fingernails, no body odour
- *Personal behaviour:* polite; patient; professional; clearly spoken; approachable

AC3.4: State standards and practices that relate to a service offer within different types of organisation

- *Service offer:* extent and limits of customer service an organisation offers (pricing and range of goods unique to the organisation); service level agreements (SLAs) - what an organisation will do to meet/exceed customer needs
- *Standards and practices:* providing good customer service (agreed organisational procedures, meeting or exceeding customer needs); products and services (quality, value for money, specifications)

AC3.5: Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role

- *Legislation:* Sale of Goods Act 1979; Consumer Credit Act 1974; Trade Descriptions Act 1968; Supply of Goods and Services Act 1982; Consumer Protection Act 1987; The Consumer Protection from Unfair Trading Regulations 2008; Data Protection Act 1998
- *Organisational requirements:* agreed policies and procedures; accepted standard of customer service

AC3.6: Describe the procedures for protecting customers' personal information and safety

- *Customers' personal information:* name; address (home, email), telephone number (home, mobile); date of birth; payment details (bank account number, credit/debit card numbers)
- *Customers' safety:* preventing injury or harm (accidents, hazardous premises/working practices)
- *Procedures:* working safely, e.g. following organisational procedures, adhering to legislation (Health and Safety at Work Act 1974, Control of Substances Hazardous to Health Regulations 2002 (COSHH), RIDDOR, Data Protection Act 1998, Consumer Protection Act 1987)

AC3.7: State the importance of protecting customers' personal information and safety

- *Importance:* e.g. avoids injury to customers, prevents customer complaints, protects customers from fraud attacks, prevents prosecution, avoids expensive compensation costs to the organisation, protects the reputation of the organisation

AC4.1: Describe types of customer behaviour that show when a customer is dissatisfied

- *Customer dissatisfaction:* when the service or product supplied by an organisation fails to meet customers' needs and expectations
- *Types of dissatisfied customer behaviour:* angry; rude; aggressive; impatient
- *Description of behaviours:* e.g. shouting at customer service staff, using inappropriate language, body language, physical contact against staff, disagreeing with service provided

AC4.2: State the procedures to be followed when dealing with customer queries or problems

- *Queries relating to:* product or service, e.g. use, specifications, limitations, price, conditions, access
- *Problems relating to:* product, e.g. failure, fault, breakdown, not meeting customer needs; service obtained, e.g. not meeting customer expectations, access, support, information; after-sales service

AC4.3: State to whom to refer customer queries and problems

- *Queries relating to:* product or service, e.g. use, specifications, limitations, price, conditions, access
- *Problems relating to:* product, e.g. failure, fault, breakdown, not meeting customer needs; service obtained, e.g. not meeting customer expectations, access, support, information; after-sales service
- *Refer to:* e.g. manager, supervisor, supplier, manufacturer, sales staff, administrator

Information for tutors

Suggested resources

Books

Kamin M – *10 Steps to Successful Customer Service* (ASTD Press, 2010) ISBN 9781562865900

McManus S – *The Customer Service Pocket Book* (Management Pocket Books Ltd, 2013) ISBN 978190661055

Timm P – *Customer Service: Career Success Through Customer Loyalty* (5th edition) (Prentice Hall, 2010) ISBN 9780135063972

Watkinson M – *The Ten Principles Behind Great Customer Experiences* (FT Publishing International, 2013) ISBN 9780273775089

Websites

www.businessballs.com – Businessballs: information on different business-related topics suited to this unit, for example complaint letters, body language, customer service, games to improve skills and understanding of relevant topics

www.instituteofcustomerservice.com – Institute of Customer Service (ICS): information on customer satisfaction surveys, research information on improving customer service levels in business, and a source of other customer service resources

Other

Customer Focus – magazine produced by the Institute of Customer Service, has information on customer service practice, including topical issues relating to the customer service industry

Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

To ensure that the assessment tasks and activities enable learners to produce valid, sufficient, authentic and appropriate evidence that meets the assessment criteria, centres should apply the *Unit assessment guidance* given below. This guidance should be read in conjunction with *Section 8 Assessment*.

Wherever possible, centres should adopt a holistic approach to assessing the units in the qualification. This gives the assessment process greater rigour and minimises repetition, time and the burden of assessment on all parties involved in the process.

Unit assessment requirements

There are no sector-related assessment requirements for this unit.

Unit assessment guidance

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

To demonstrate achievement of this knowledge unit, tutors could plan to collect evidence from question and answer (Q&A) sessions, either conducted orally or through written responses, and reflective accounts. Tutors should help learners to develop their knowledge of the skills required to work in a customer service role and encourage independent research and learning. Learners should be encouraged to reflect on their experience of having worked in a customer service environment or, from a customer's perspective, of receiving customer service.

To meet all the requirements of learning outcomes 1, 2, 3 and 4 tutors could set tasks for learners to explore the meaning and importance of each assessment criterion. These could be followed by an opportunity, such as group discussion, for learners to share their experiences of either providing or receiving customer service. Once these key outcomes have been covered, tutors could plan to collect evidence of individual learner competence using the most appropriate method of assessment listed above, ensuring that it is suited to the individual needs of the learner. The final evidence collected must be the learner's own work and must demonstrate individual achievement of the assessment criteria.

To achieve AC1.2, learners must state at least two reasons why effective customer service is important to an organisation.

To meet AC2.2, learners must state at least two ways of identifying customers' needs and expectations. For AC2.3, learners must list at least three information sources needed to deliver reliable customer service.

To achieve AC3.1, learners must identify at least two personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services. For AC3.2, learners must identify all job roles within a customer service team consisting of at least three different job roles. For AC3.3, learners must state standards of personal presentation and behaviour expected in at least two different organisations. To achieve AC3.5, AC3.6 and AC3.7, learners' responses must be at the appropriate breadth and depth to meet the level of demand and should cover legislative, regulatory and organisational requirements.

To meet AC4.1, learners must describe at least three types of behaviour that show when a customer is dissatisfied.

If centres use evidence produced orally, the assessor should produce observation records which have sufficient detail to show why the assessor decided that each learning outcome has been met. Supporting evidence in the form of written materials, documents and learners' notes should be retained as part of the assessment evidence to enable internal and external quality assurance processes to be conducted. Tutors and assessors should ensure that the correct operative verbs, as used in the assessment criteria, are included in all assessments.

Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.