

all you need to know.

Qualification Specification

NCFE Level 2 NVQ Certificate in Contact
Centre Operations (600/1257/2)

Issue 1 November 2015

Contents

Section 1	4
Qualification overview	5
Introduction	5
Things you need to know	6
About this qualification	6
Geographical coverage	7
Aims and objectives of this qualification	7
Achieving this qualification	7
Barred units	10
Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)	10
Entry guidance	11
Progression opportunities	11
Credit accumulation and transfer	11
Exemption	12
Equivalent units	12
Recognition of Prior Learning (RPL)	12
Qualification dates	13
Staffing requirements	13
Resource requirements	14
Support for learners	14
Learner's Evidence Tracking Log (LETL)	14
Support for centres	14
Centre Support team	14
Reasonable Adjustments and Special Considerations Policy	14
Directory of Products and Services	15
Fees and Pricing	15
Training and support	15
Mapping to National Occupational Standards	15
Section 2	16
Unit content	17
Unit 01 Improve personal effectiveness at work in a contact centre	18
Unit 02 Comply with health and safety procedures in a contact centre	20
Unit 03 Use systems and technology during customer contact in a contact centre	22
Unit 04 Deliver customer service through a contact centre	24
Unit 05 Carry out direct sales activities in a contact centre	26
Unit 06 Communicate information to customers in different but familiar contexts through a contact centre	28
Unit 07 Provide support through a contact centre for specified products and/or services	30
Unit 08 Deal with incidents through a contact centre	32
Unit 09 Support customers and colleagues when providing contact centre services	34
Unit 10 Deal with customers using bespoke software	36
Unit 11 Deal with incoming telephone calls from customers	38
Unit 12 Promote additional services or products to customers	41
Unit 13 Using email	43

Unit 14 Using collaborative technologies	45
Unit 15 Word processing software	47
Unit 16 Using email	49
Unit 17 Using collaborative technologies	50
Unit 18 Bespoke software	52
Unit 19 Handling objections and closing sales	54
Unit 20 Time planning in sales	56
Unit 21 Selling by telephone – inbound	58
Unit 22 Selling by telephone – outbound	61
Unit 23 Inputting and accessing sales or marketing data in information systems	64
Unit 24 Maintain customer service through effective handover	66
Unit 25 Resolve customer service problems	68
Unit 26 Process information about customers	70
Unit 27 Deliver customer service to difficult customers	72
Unit 28 Buddy a colleague to develop their customer service skills	74
Unit 29 Develop your own customer service skills through self-study	77
Unit 30 Give customers a positive impression of yourself and your organisation	79
Unit 31 Support customers using on-line customer services	81
Unit 32 Follow the rules to deliver customer service	83
Unit 33 Process customer service complaints	85
Unit 34 Work with others to improve customer service	87
Unit 35 Develop working relationships with colleagues	89
Unit 36 IT communication fundamentals	91
Unit 37 Using the Internet	93
Unit 38 Using the Internet	95
Unit 39 IT communication fundamentals	98
Section 3	100
Assessment and Moderation	101
How the qualification is assessed	101
Internal assessment	101
Moderation	102
Section 4	103
General information	103
Equal opportunities	104
Diversity, access and inclusion	104
Data protection	104
Feedback	105
Contact us	106

Section 1

Qualification overview

Qualification overview

Introduction

We want to make your experience of working with NCFE as pleasant and easy as possible. This qualification specification contains everything you need to know about this qualification and should be used by everyone involved in the planning, delivery and assessment of the NCFE Level 2 NVQ Certificate in Contact Centre Operations.

All information contained in this specification is correct at the time of publishing.

To ensure that you're using the most up-to-date version of this qualification specification please check the issue date in the page headers against that of the qualification specification on our website www.ncfe.org.uk.

If you advertise this qualification using a different or shortened name you must ensure that learners are aware that their final certificate will state the regulated qualification title of NCFE Level 2 NVQ Certificate in Contact Centre Operations.

The NCFE Level 2 NVQ Certificate in Contact Centre Operations is a competence-based qualification.

A competence-based qualification is based on National Occupational Standards (NOS) and is a job-ready qualification which requires learners to demonstrate the skills and knowledge required to work in a specific industry. A competence-based qualification must be assessed in the workplace or in a realistic work environment (RWE) in accordance with the relevant assessment strategy. For further information on the strategy please visit the qualifications page on our website www.ncfe.org.uk.

Things you need to know

Qualification number (QN)	600/1257/2
Aim reference	60012572
Guided learning hours (GLH):	93–172
Credit value	28
QCF level	2
Assessment requirements	Internally assessed and externally moderated portfolio of evidence

About this qualification

The NCFE Level 2 NVQ Certificate in Contact Centre Operations is listed on the Register of Regulated Qualifications¹ and is part of the Qualifications and Credit Framework (QCF).

This qualification forms part of a suite of qualifications which make up the Intermediate Apprenticeship in Contact Centre Operations.

This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

¹ The qualifications regulators (regulators) are Ofqual in England and Northern Ireland, and Qualifications Wales in Wales.

Geographical coverage

This qualification has been regulated for use in England, Wales and Northern Ireland. We're able to provide the qualification specification and assessment materials in the Welsh and/or Irish language where requested and appropriate.

Aims and objectives of this qualification

This qualification aims to:

- help learners to develop their skills and understanding of contact centre operations.

The objective of this qualification is to help learners:

- develop competence in a range of activities including customer care, direct selling and providing remote support for products or services.

Achieving this qualification

To be awarded the NCFE Level 2 NVQ Certificate in Contact Centre Operations learners must achieve a minimum of 28 credits:

- a total of 6 credits from the mandatory units in Group A
- a minimum of 12 credits from the optional units in Group B
- the remaining 10 credits can come from the optional units in Group B or Group C.

At least 15 credits must be at Level 2.

Group A mandatory units

Unit No	Unit title	Credit
Unit 01	Improve personal effectiveness at work in a contact centre	4 credits
Unit 02	Comply with health and safety procedures in a contact centre	2 credits

Group B optional units

Unit No	Unit title	Credit
Unit 03	Use systems and technology during customer contact in a contact centre	4 credits
Unit 04	Deliver customer service through a contact centre	5 credits
Unit 05	Carry out direct sales activities in a contact centre	5 credits
Unit 06	Communicate information to customers in different but familiar contexts through a contact centre	4 credits
Unit 07	Provide support through a contact centre for specified products and/or services	4 credits
Unit 08	Deal with incidents through a contact centre	7 credits
Unit 09	Support customers and colleagues when providing contact centre services	5 credits

Group C optional units

Unit No	Unit title	Credit
Unit 10	Deal with customers using bespoke software	5 credits
Unit 11	Deal with incoming telephone calls from customers	5 credits
Unit 12	Promote additional services or products to customers	6 credits
Unit 13	Using email	2 credits
Unit 14	Using collaborative technologies	3 credits
Unit 15	Word processing software	3 credits
Unit 16	Using email	3 credits
Unit 17	Using collaborative technologies	4 credits
Unit 18	Bespoke software	3 credits
Unit 19	Handling objections and closing sales	3 credits
Unit 20	Time planning in sales	2 credits
Unit 21	Selling by telephone – inbound	4 credits
Unit 22	Selling by telephone – outbound	4 credits
Unit 23	Inputting and accessing sales or marketing data in information systems	2 credits
Unit 24	Maintain customer service through effective handover	4 credits

Group C optional units (cont'd)

Unit No	Unit title	Credit
Unit 25	Resolve customer service problems	6 credits
Unit 26	Process information about customers	5 credits
Unit 27	Deliver customer service to difficult customers	6 credits
Unit 28	Buddy a colleague to develop their customer service skills	5 credits
Unit 29	Develop your own customer service skills through self-study	6 credits
Unit 30	Give customers a positive impression of yourself and your organisation	5 credits
Unit 31	Support customers using on-line customer services	5 credits
Unit 32	Follow the rules to deliver customer service	4 credits
Unit 33	Process customer service complaints	6 credits
Unit 34	Work with others to improve customer service	8 credits
Unit 35	Develop working relationships with colleagues	3 credits
Unit 36	IT communication fundamentals	2 credits
Unit 37	Using the Internet	3 credits
Unit 38	Using the Internet	4 credits
Unit 39	IT communication fundamentals	2 credits

The learning outcomes and assessment criteria for each unit are provided in Section 2 (page 16).

The units above may be available as stand-alone unit programmes. Please visit www.ncfe.org.uk/units for further information.

To achieve the NCFE Level 2 NVQ Certificate in Contact Centre Operations, learners must successfully demonstrate their achievement of all learning outcomes and assessment criteria of the units as detailed in this qualification specification. Grades are not awarded.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply. A Credit Certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

Barred units

This qualification contains barred units. These are units that can't be counted together as part of a rule of combination for a qualification. One unit is usually barred against another if there is a lot of overlap between the unit content. If a learner completes units that are barred, they won't all be recognised towards this qualification. Only one of the units will count towards the credit total required to achieve this qualification. Barred units are identified below.

- Unit 13 Using email (J/502/4299) is barred against Unit 16 Using email (M/502/4300)
- Unit 14 Using collaborative technologies (A/502/4378) is barred against Unit 17 Using collaborative technologies (F/502/4379)
- Unit 10 Deal with customers using bespoke software (L/601/1225) is barred against Unit 18 Bespoke software (F/502/4396)
- Unit 37 Using the Internet (T/502/4296) is barred against Unit 38 Using the Internet (A/502/4297)
- Unit 36 IT communication fundamentals (Y/502/4291) is barred against Unit 39 IT communication fundamentals (D/502/4292)

Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)

Where the assessment strategy for a unit/qualification allows, it is essential that organisations wishing to operate an RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This will ensure that any competence achieved in this way will be sustained in real employment.

Entry guidance

This qualification is designed for those who would like to work or who are already working in a contact centre setting, under minimal supervision.

There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.

Entry is at the discretion of the centre. This qualification is suitable for learners aged pre-16 and above.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the assessment criteria and comply with the relevant literacy, numeracy and health and safety aspects of this qualification. Learners registered on this qualification shouldn't undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

Progression opportunities

Learners who achieve this qualification could progress to:

- NCFE Level 2 and 3 qualifications in sales
- NCFE Level 3 Certificate in Contact Centre Operations
- NCFE Level 3 NVQ Diploma in Contact Centre Operations

Learners may also progress to employment in a contact centre environment in roles such as Contact Centre Agent, Operative or Advisor.

Credit accumulation and transfer

One of the benefits of the QCF is that learners can transfer credit from one qualification to another. Learners who've already achieved one or more of the units included in this qualification elsewhere can transfer the credit already achieved. Simply let us know which units are being achieved by credit transfer via the Portal or on the Certificate Claim Form.

All units in this qualification are available for credit transfer.

Exemption

Exemption allows learners to use evidence of certificated, non-QCF achievement deemed to be of equivalent value against the requirements of a qualification. However, there are no exemptions currently identified for this qualification.

Equivalent units

Some units have equivalent units identified against them. If a learner has achieved these units previously, they can use them towards achievement of this qualification. However, this qualification has no equivalent units identified.

For more information on these approaches to accumulating and claiming credit, please see the guidance document Credit Transfer, Equivalence and Exemption in the QCF section of our website www.ncfe.org.uk.

Recognition of Prior Learning (RPL)

RPL is where a learner has previously learnt something but hasn't received formal recognition for this learning through a qualification or other form of certification.

Within the QCF, a learner is able to claim that they know or can do something already and that they don't need to attend a course to learn it again. The learner will need to prove this claim (through assessment of relevant evidence) and then credit can be awarded for that achievement. For more information on the process to follow to claim RPL, contact our Quality Assurance team.

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by a qualified RPL Advisor.

Qualification dates

Qualifications on the QCF have review dates, operational end dates and certification end dates.

The qualification review date is the date by which we'll have carried out a review of the qualification. This date is shown on the qualifications page on our website www.ncfe.org.uk.

We review qualifications up to 18 months before their review date, working with sector representatives to make any changes necessary to meet sector needs and to reflect recent developments. In most cases we'll then extend the qualification, and set a new review date. If we make the decision to withdraw a qualification, we'll set an operational end date.

If we extend the review date, this will be shown on the qualifications page on our website www.ncfe.org.uk and approved centres will be kept updated.

The operational end date will only show on the Register if we've made the decision to withdraw a qualification. After this date we can no longer accept learner registrations.

The certification end date will only show on the Register once an operational end date has been set. After this date we can no longer process certification claims.

Staffing requirements

Assessors and deliverers must ensure that they adhere to the occupational competence guidelines and supporting information given in the Skills CFA Assessment Strategy for Contact Centres Operations, which is available from the NCFE website www.ncfe.org.uk.

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register
- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure that all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

Resource requirements

The following documents are essential reading for any centre involved in the delivery, assessment and administration of this qualification:

- Skills CFA Assessment Strategy for Contact Centres Operations
- Skills CFA Sales Assessment Strategy
- e-skills UK Assessment Strategy for IT and Telecoms Qualifications
- Qualifications and Awards with Simulation and Assessment in a Realistic Work Environment (RWE) – Guidance for Centres (and Moderators).

These documents can be downloaded from the qualifications page on our website www.ncfe.org.uk.

Support for learners

Learner's Evidence Tracking Log (LETL)

The LETL covers the mandatory units in this qualification and it can help learners keep track of their work. This document can be downloaded free of charge from the qualifications page on our website www.ncfe.org.uk. You don't have to use the LETL – you can devise your own evidence-tracking document instead.

Support for centres

There are a number of documents available on our website that centres might find useful. These are linked below:

- www.ncfe.org.uk/resources/ncfe-resources/course-file-documents
- www.ncfe.org.uk/centre-information/assessment-and-moderation-proformas

Centre Support team

Our [award winning](#) Centre Support Team will support you with approvals, registrations, moderators, external assessment, results and certification. You can find contact details for your Centre Support Assistant [here](#) or get more information by calling 0191 239 8000 or emailing service@ncfe.org.uk.

Reasonable Adjustments and Special Considerations Policy

This policy is aimed at customers – including learners – who use our products and services and who submit requests for reasonable adjustments and special considerations. The policy can be found on our website here: www.ncfe.org.uk/centre-information/policies-and-regulations/.

Directory of Products and Services

This provides summary information about all NCFE qualifications and awards, including mandatory and optional units, learner registration and certification fees, and assessment information.

Fees and Pricing

The current fees and pricing guide is available on our website www.ncfe.org.uk.

Training and support

We can provide training sessions for Assessors and Internal Moderators. Bespoke subject-specific training is also available. For further information please contact our Quality Assurance team on 0191 239 8000.

Mapping to National Occupational Standards

National Occupational Standards (NOS) are owned by a Sector Skills Council (SSC) or Standard-Setting Body (SSB) and describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The units and structure of this qualification are based on the Skills CFA National Occupational Standards for Contact Centre Operations.

Further information on the NOS used in this qualification can be found on the SSC website www.skillsca.org.

Section 2

Unit content

Unit content

This section provides details of the structure and content of this qualification.

The unit overview provides an overview of each unit including:

- unit title
- unit summary
- guided learning hours
- credit value
- level
- an indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- unit title and number
- learning outcomes (the learner will) and assessment criteria (the learner can).

The regulators' accredited unit number is indicated in brackets for each unit (eg M/100/7116). However, to make cross-referencing assessment and moderation easier, we've used a sequential numbering system in this document for each unit.

For further information or guidance about this qualification please contact our Research and Product Development team on 0191 239 8000.

Unit 01 Improve personal effectiveness at work in a contact centre (T/503/0342)

Unit summary	In this unit learners will assess personal effectiveness and carry out development activities to improve personal effectiveness in a contact centre. They will work with others in a contact centre team to improve personal performance and understand how to improve personal effectiveness in a contact centre.
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Guided learning hours	15
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Credit value	4
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Level	2
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Mandatory/optional	Mandatory
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The learner will:

- 1 Be able to assess personal effectiveness in a contact centre

The learner can:

- 1.1 Identify strengths and areas for development in skills and knowledge against agreed criteria
 - 1.2 Agree learning actions that address priority learning and personal development needs
-

The learner will:

- 2 Be able to carry out development activities to improve personal effectiveness in a contact centre

The learner can:

- 2.1 Participate in a programme of learning activities that supports personal development needs
 - 2.2 Use feedback from participation in the agreed development activities to improve personal performance
-

Unit 01 Improve personal effectiveness at work in a contact centre (T/503/0342) (cont'd)

The learner will:

- 3 Be able to work with others in a contact centre team to improve personal performance

The learner can:

- 3.1 Identify how everyday work in a team leads to learning and personal development
 - 3.2 Participate in team tasks that provide on-the-job learning opportunities
 - 3.3 Use feedback on personal performance to plan further learning steps
-

The learner will:

- 4 Understand how to improve personal effectiveness in a contact centre

The learner can:

- 4.1 Describe the organisational procedures and guidelines for contact centre tasks defined by their job role
 - 4.2 Describe the range of products and/or services offered or supported by the contact centre
 - 4.3 Describe the impact of legislation and/or regulations on their role within the contact centre
 - 4.4 Explain the importance of using development activities that are relevant to identified business needs
 - 4.5 Explain different sources of feedback to the personal development process
 - 4.6 Explain the importance of feedback to the personal development process
 - 4.7 Explain the importance of involving a person in authority in making a personal development plan
-

Unit 02 Comply with health and safety procedures in a contact centre (D/503/0352)

Unit summary	In this unit learners will be able to comply with organisational health and safety procedures and minimise health and safety risks relating to the job role in a contact centre. Learners will also understand the principles of health and safety in a contact centre.
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Guided learning hours	9
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Credit value	2
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Level	1
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Mandatory/optional	Mandatory
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The learner will:

- 1 Be able to comply with organisational health and safety procedures in a contact centre

The learner can:

- 1.1 Identify the health and safety procedures relevant to the job role
- 1.2 Follow organisational health and safety procedures and techniques at all times
- 1.3 Follow the organisational and the manufacturer's instructions for the use of equipment and tools

The learner will:

- 2 Be able to minimise health and safety risks relating to the job role in a contact centre

The learner can:

- 2.1 Identify the health and safety risks relevant to the job role
 - 2.2 List the job role duties and responsibilities for minimising health and safety risks
 - 2.3 Keep the work area clean and tidy in accordance with organisational requirements
 - 2.4 Identify the actions to be taken if health and safety risks are not being minimised
-

**Unit 02 Comply with health and safety procedures in a contact centre
(D/503/0352) (cont'd)**

The learner will:

- 3 Understand the principles of health and safety in a contact centre

The learner can:

- 3.1 State how health and safety procedures affect their job role
 - 3.2 Explain the purpose and use of safety-related equipment
 - 3.3 Explain how to lift and handle heavy objects safely
 - 3.4 Describe the health and safety hazards relevant to the job role
 - 3.5 Describe common health and safety standards in the workplace including excessive noise, prolonged use of display screens and hazardous substances
 - 3.6 Explain why it is important to keep the work area clean and tidy
 - 3.7 State the difference between hazard and risk in the work area
-

Unit 03 Use systems and technology during customer contact in a contact centre (J/503/0362)

Unit summary	In this unit learners will use systems and technology to handle customer contacts. They will also be able to report on customer and contact handling information.
Guided learning hours	24
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to use features of systems and technology to handle customer contacts in a contact centre

The learner can:

- 1.1 Handle contacts identified by the contact distribution system in accordance with organisational procedures
- 1.2 Access customer information through the system in accordance with organisational procedures
- 1.3 Adjust individual system settings to enable communication with customers through interactive functionality specific to the job role
- 1.4 Enhance customer service by making maximum use of the available functionality

The learner will:

- 2 Be able to report on customer and contact handling information using pre-defined formats

The learner can:

- 2.1 Identify the customer and contact handling information needed for personal work planning and organisational reporting
 - 2.2 Produce customer information and contact handling reports according to organisational guidelines and standards
-

Unit 03 Use systems and technology during customer contact in a contact centre (J/503/0362) (cont'd)

The learner will:

- 3 Understand the uses of contact centre systems and technology

The learner can:

- 3.1 Explain the benefits of different technology systems in terms of their ability to facilitate communication with customers
 - 3.2 Describe the products and/or services offered or supported by the contact centre
 - 3.3 Describe the organisational requirements and regulation or legislation that have an impact on the contact centre's operations
 - 3.4 Describe the organisational procedures and guidelines for customer contact handling
 - 3.5 Describe the purpose of contact distribution systems and how the organisation's system works
 - 3.6 State the reasons for checking the sense of reports before issuing
-

Unit 04 Deliver customer service through a contact centre (K/503/0385)

Unit summary	In this unit learners will deliver customer service through a contact centre. They will establish rapport with customers and be able to support customer service delivery through a contact centre.
Guided learning hours	12
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to establish rapport with customers in a contact centre

The learner can:

- 1.1 Follow organisational guidelines for greeting and identifying customers
- 1.2 Explain the features and benefits of products and/or services to customers in accordance with organisational requirements
- 1.3 Provide the required information in response to customer requests
- 1.4 Check customers' understanding of the information provided
- 1.5 Identify options for the resolution of customers' queries that meet their needs
- 1.6 Close the customer contact in accordance with organisational guidelines

The learner will:

- 2 Be able to support customer service delivery through a contact centre

The learner can:

- 2.1 Identify precisely customers' needs or requests
 - 2.2 Check understanding of customers' needs by summarising their queries and requests
 - 2.3 Keep records of customer queries or requests in accordance with organisational procedures
 - 2.4 Use information collected from customers to enhance customer service delivery
-

**Unit 04 Deliver customer service through a contact centre (K/503/0385)
(cont'd)**

The learner will:

- 3 Be able to deliver customer service in a contact centre

The learner can:

- 3.1 Establish the limit of their authority for dealing with customers
 - 3.2 Explain to customers when their enquiry must be referred to someone else because authority limits have been exceeded
 - 3.3 Comply with regulatory requirements during customer contacts
 - 3.4 Explain the regulatory constraints to the customer when they affect customer service
-

The learner will:

- 4 Understand customer service in contact centres

The learner can:

- 4.1 Describe the limitations of the service offer that can be made to customers
 - 4.2 Describe the limits of authority in dealing with customers
 - 4.3 Explain the importance of checking customers' understanding of information provided
 - 4.4 Explain the importance of closing a customer contact in a professional way in accordance with organisational procedures and standards
 - 4.5 Describe the sources of information to be checked in order to update knowledge and understanding of organisational and regulatory requirements
 - 4.6 Explain the importance of understanding the customer's message
 - 4.7 Describe methods of adapting communication with customers to meet their expectations
-

Unit 05 Carry out direct sales activities in a contact centre (L/503/0394)

Unit summary	In this unit learners will be able to carry out direct sales to customers through a contact centre. They will keep direct sales records, understand how to conduct sales activities and comply with regulations and legislation during direct sales in a contact centre.
Guided learning hours	15
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to gather information needed for direct sales activities in a contact centre

The learner can:

- 1.1 Assemble information about products and/or services that support direct sales
- 1.2 Obtain from customers sufficient information to support direct sales activities
- 1.3 Create sales opportunities by making links between information provided by customers and products and/or services
- 1.4 Find potential new customers for products and/or services

The learner will:

- 2 Be able to carry out direct sales to customers through a contact centre

The learner can:

- 2.1 Establish customers' identity in accordance with organisational procedures
 - 2.2 Check customers' wishes and needs
 - 2.3 Identify possible matches with products and/or services from information provided by customers
 - 2.4 Explain to customers the features and benefits of products and/or services for sale
 - 2.5 Adapt their sales approach and style to meet customer preferences
 - 2.6 Maximise opportunities for cross-selling and up-selling
 - 2.7 Complete the authorisation or payment in accordance with organisational procedures
-

Unit 05 Carry out direct sales activities in a contact centre (L/503/0394) (cont'd)

The learner will:

- 3 Be able to keep direct sales records within a contact centre

The learner can:

- 3.1 Identify the information about customers, products and/or services that should be recorded during the sales process
 - 3.2 Record customer, product and/or service information in accordance with organisational procedures
-

The learner will:

- 4 Be able to comply with regulations and legislation during direct sales in a contact centre

The learner can:

- 4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre
 - 4.2 Ensure compliance with regulations during direct selling through a contact centre
-

The learner will:

- 5 Understand how to conduct sales activities in a contact centre

The learner can:

- 5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre
 - 5.2 Describe the organisational policies and procedures for direct sales through a contact centre
 - 5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
 - 5.4 Describe the common objections and questions raised by customers during direct selling
 - 5.5 Explain how to identify cross-selling and up-selling opportunities
 - 5.6 Describe different methods of researching potential new customers
 - 5.7 Explain how to retrieve information from organisational sales records
 - 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling
-

Unit 06 Communicate information to customers in different but familiar contexts through a contact centre (H/503/0403)

Unit summary	In this unit learners will be able to talk to customers and communicate in writing on familiar subjects in a contact centre. They will also understand the requirements of customer communication in a contact centre.
Guided learning hours	12
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to talk to customers on familiar subjects in a contact centre

The learner can:

- 1.1 Establish a rapport with customers in accordance with organisational guidelines
- 1.2 Describe products and/or services to customers in accordance with organisational guidelines
- 1.3 Provide the required information in response to customer questions about products and/or services
- 1.4 Vary the tone of voice to maintain customers' interest in products and/or services
- 1.5 Display "active listening" by replaying customers' comments back to them

The learner will:

- 2 Be able to communicate in writing on familiar subjects in a contact centre

The learner can:

- 2.1 Identify when a customer contact would benefit from written communications
- 2.2 Produce written communications in accordance with organisational guidelines
- 2.3 Comply with recommended formats and layouts for written communications with customers
- 2.4 Ensure that written communications are concise and the meaning is clear
- 2.5 Ensure that written communications are accurate in content, spelling and grammar and conform with organisational guidelines before despatch

Unit 06 Communicate information to customers in different but familiar contexts through a contact centre (H/503/0403) (cont'd)

The learner will:

- 3 Understand the requirements of customer communication in a contact centre

The learner can:

- 3.1 Describe the products and/or services offered or supported by the contact centre
 - 3.2 Describe the organisational requirements and regulations about what can and cannot be expressed to customers verbally and/or in writing
 - 3.3 Explain what information is best given to customers verbally and what is best given in writing
 - 3.4 Explain how positive and negative language affects communications with customers verbally and/or in writing
 - 3.5 List the frequently asked questions from customers about products and/or services and responses to them
 - 3.6 Explain the importance of varying tone when talking to customers
 - 3.7 Explain the benefits and drawbacks of communicating with customers by telephone and in writing
 - 3.8 Explain the importance of reviewing and proof-reading before sending written communications to customers
-

Unit 07 Provide support through a contact centre for specified products and/or services (L/503/0413)

Unit summary	In this unit learners will be able to establish and validate customers' identity and support customer needs about a range of products and/or services in a contact centre.
Guided learning hours	18
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to establish and validate customers' identity in a contact centre

The learner can:

- 1.1 Link customers' identities with correct organisational records
- 1.2 Confirm customers' identities and authorities in accordance with organisational procedures
- 1.3 Record any departure from the standard authorisation process in accordance with organisational procedures
- 1.4 Explain to customers the reasons for the authorisation procedures

The learner will:

- 2 Be able to support customer needs for information and decisions about a range of products and/or services in a contact centre

The learner can:

- 2.1 Provide customers with the required information across a range of products and/or services
- 2.2 Use language and conversation in accordance with organisational guidelines
- 2.3 Make use of the features of communication equipment specified within the job role
- 2.4 Offer customers options for different requests about products and/or services that meet their requirements
- 2.5 Resolve customers' problems within their level of authority
- 2.6 Refer customers to someone with greater authority when customers' needs cannot be met within the limits of their authority
- 2.7 Comply with organisational procedures during customer contacts

Unit 07 Provide support through a contact centre for specified products and/or services (L/503/0413) (cont'd)

The learner will:

- 3 Understand how to support customers in a contact centre

The learner can:

- 3.1 Describe the features and uses of products and/or services with which they can deal
 - 3.2 Describe ways of maintaining and updating knowledge and understanding of products and/or services
 - 3.3 Explain the regulations and legislation that have an impact on contact with customers
-

Unit 08 Deal with incidents through a contact centre (K/503/0421)

Unit summary	In this unit learners will be able to deal with incidents through a contact centre. They will be able to use contact centre communications systems to deploy incident management resources and communicate with external organisations in accordance with organisational procedures.
Guided learning hours	40
Credit value	7
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Be able to deal with incidents through a contact centre

The learner can:

- 1.1 Respond to incoming calls in a calm and professional manner
- 1.2 Maintain control of the conversation
- 1.3 Record the contact and information in an incident log in accordance with organisational procedures
- 1.4 Assess and prioritise reported incidents in accordance with organisational procedures
- 1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures
- 1.6 Provide information, advice and support in response to requests in accordance with organisational procedures
- 1.7 Escalate incident responses in accordance with organisational procedures

The learner will:

- 2 Be able to use contact centre communications systems to deploy incident management resources

The learner can:

- 2.1 Communicate with external organisations in accordance with organisational procedures
- 2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident
- 2.3 Use agreed conventions of wording, style and approach appropriate for different communication media

**Unit 08 Deal with incidents through a contact centre (K/503/0421)
(cont'd)**

The learner will:

- 3 Understand how to deal with incidents in a contact centre

The learner can:

- 3.1 Describe the incident management services offered by the contact centre
 - 3.2 Describe the impact of regulation or legislation on incident management
 - 3.3 Describe the purpose and use of decision trees
 - 3.4 Describe how to determine the appropriate allocation of resources to incidents
 - 3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response
 - 3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
 - 3.7 Describe standard wording and codes used by the organisation when dealing with incident management
 - 3.8 Describe the type and extent of resources available for deployment in incident management
-

Unit 09 Support customers and colleagues when providing contact centre services (J/503/0426)

Unit summary	In this unit learners will be able to communicate information about products and/or services to customers and be able to monitor compliance with organisational requirements for customer contacts. They will also be able to provide advice and support to colleagues in a contact centre.
Guided learning hours	15
Credit value	5
Level	3
Mandatory/optional	Optional

The learner will:

- 1 Be able to communicate information about products and/or services to customers in a contact centre

The learner can:

- 1.1 Validate customers' identity in accordance with organisational procedures
- 1.2 Give customers an overview of products and/or services in accordance with organisational procedures for language and conversation
- 1.3 Resolve customers' problems and queries in a contact centre within their level of authority
- 1.4 Assist customers with decisions about products and/or services in accordance with organisational guidelines, relevant regulation or legislation
- 1.5 Refer customers to someone with greater authority when customers' requests or problems are beyond their level of authority
- 1.6 Record customer problems and complaints in accordance with organisational procedures

The learner will:

- 2 Be able to monitor compliance with organisational requirements for customer contacts

The learner can:

- 2.1 Monitor compliance with organisational requirements for customer contacts against agreed criteria
- 2.2 Deal with breaches of organisational requirements in accordance with organisational procedures

Unit 09 Support customers and colleagues when providing contact centre services (J/503/0426) (cont'd)

The learner will:

- 3 Be able to provide advice and support to colleagues in a contact centre

The learner can:

- 3.1 Provide advice on matters relating to customers' identity, personal security and products and/or services that meet organisational standards and legislative or regulatory requirements
 - 3.2 Provide support that increases colleagues' understanding of organisational requirements and constraints on customer contacts that is commensurate with their needs
-

The learner will:

- 4 Understand how to support colleagues and customers in a contact centre

The learner can:

- 4.1 Explain the effect of organisational and regulatory requirements on supporting colleagues and customers
 - 4.2 Explain what constitutes non-compliance with legal and regulatory requirements and the implications of this
 - 4.3 Describe different sources of information about the organisation's products and/or services
 - 4.4 Explain how to update and maintain knowledge and understanding of products and/or services
 - 4.5 Explain the organisational systems for identifying customers and related personal security matters
 - 4.6 Explain how buddying and assisting colleagues with handling customer contacts increases understanding of organisational requirements
-

Unit 10 Deal with customers using bespoke software (L/601/1225)

Unit summary	Learners will develop skills to help them prepare and deliver customer service using bespoke software following organisational procedures.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Prepare to deliver customer service using bespoke software

The learner can:

- 1.1 Sign on and open access to appropriate functions in the IT system
- 1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas
- 1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver
- 1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
- 1.5 Prepare their work area to deliver customer service using bespoke software

The learner will:

- 2 Deliver customer service using bespoke software

The learner can:

- 2.1 Identify their customer or the services or products they wish to access
- 2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs
- 2.3 Use search or other specialist functions within the software to respond to customer requests
- 2.4 Enter new records using the bespoke software system
- 2.5 Amend customer service records in the bespoke software system

Unit 10 Deal with customers using bespoke software (L/601/1225) (cont'd)

- 2.6 Communicate with their customers in terms they can understand relating to the software system
 - 2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
 - 2.8 Interpret error messages and act on them to support their customer service
 - 2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction
-

The learner will:

- 3 Understand how to deal with customers using bespoke software

The learner can:

- 3.1 Describe access and sign-on routines for the bespoke software system
 - 3.2 Describe the architecture and geography of the bespoke software system
 - 3.3 Identify different screen or menu routes that can be followed to meet customer requirements
 - 3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines
 - 3.5 Explain the importance of preparing a work area before delivering customer service
 - 3.6 Explain search or other enquiry facilities within the bespoke software system
 - 3.7 State the importance of avoiding jargon and system terminology when communicating with customers
 - 3.8 Describe ways to respond to error messages when using a bespoke software system
 - 3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system
-

Barred units for Deal with customers using bespoke software (L/601/1225)

This unit is barred against the following unit:

- Unit 18 Bespoke Software (F/502/4396)
-

Unit 11 Deal with incoming telephone calls from customers (F/601/1223)

Unit summary	Learners will know how to deal with incoming telephone calls from customers. They will deal effectively with customer questions and requests and establish rapport. They will also use communication systems effectively.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Use communication systems effectively

The learner can:

- 1.1 Operate telecommunication equipment efficiently and effectively
- 1.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer
- 1.3 Listen carefully when collecting information from their customer
- 1.4 Select the information they need to record and store following their organisation's guidelines
- 1.5 Update their customer records during or after the call to reflect the key points of the conversation

The learner will:

- 2 Establish rapport with customers who are calling

The learner can:

- 2.1 Greet their customer following their organisation's guidelines
 - 2.2 Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call
 - 2.3 Confirm the identity of their customer following organisational guidelines
 - 2.4 Use effective and assertive questions to clarify their customer's requests
-

Unit 11 Deal with incoming telephone calls from customers (F/601/1223) (cont'd)

The learner will:

- 3 Deal effectively with customer questions and requests

The learner can:

- 3.1 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each
 - 3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer
 - 3.3 Give clear and concise information to customers in response to questions or requests
 - 3.4 Use questions and answers to control the length of the conversation
 - 3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time
 - 3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague
 - 3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result
 - 3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with
 - 3.9 Complete any follow up actions agreed during the call
 - 3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests
 - 3.11 Ensure that promises to call back are kept
-

Unit 11 Deal with incoming telephone calls from customers (F/601/1223) (cont'd)

The learner will:

- 4 Know how to deal with incoming telephone calls from customers

The learner can:

- 4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment
 - 4.2 Explain how to operate the organisation's telecommunication equipment
 - 4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone
 - 4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone
 - 4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
 - 4.6 Identify what information is important to note during or after telephone conversations with customers
 - 4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
 - 4.8 Explain the importance of keeping their customer informed if they are on hold during a call
 - 4.9 Explain the importance of not talking across an open line
 - 4.10 List details that should be included if taking a message for a colleague
 - 4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers
 - 4.12 Describe their organisation's guidelines for handling abusive calls
-

Unit 12 Promote additional services or products to customers (D/601/0936)

Unit summary	Learners will identify additional services or products. They will also promote these to the customer and gain customer commitment to using the additional services or products.
Guided learning hours	40
Credit value	6
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Identify additional services or products that are available

The learner can:

- 1.1 Update and develop their knowledge of their organisation's services or products
- 1.2 Check with others when they are unsure about new service or product details
- 1.3 Identify appropriate services or products that may interest their customer
- 1.4 Spot opportunities for offering their customer additional services or products that will improve the customer experience

The learner will:

- 2 Inform customers about additional services or products

The learner can:

- 2.1 Choose the best time to inform their customer about additional services or products
- 2.2 Choose the best method of communication to introduce their customer to additional services or products
- 2.3 Give their customer accurate and sufficient information to enable them to make a decision about the additional services or products
- 2.4 Give their customer time to ask questions about the additional services or products

Unit 12 Promote additional services or products to customers (D/601/0936) (cont'd)

The learner will:

- 3 Gain customer commitment to using additional services or products

The learner can:

- 3.1 Close the conversation if the customer shows no interest
 - 3.2 Give information to move the situation forward when their customer shows interest
 - 3.3 Secure customer agreement and check customer understanding of the delivery of the service or product
 - 3.4 Take action to ensure prompt delivery of the additional services or products to their customer
 - 3.5 Refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility
-

The learner will:

- 4 Understand how to promote additional services or products to customers

The learner can:

- 4.1 Describe the organisation's procedures and systems for encouraging the use of additional services or products
 - 4.2 Explain how additional services or products will benefit their customers
 - 4.3 Explain how their customer's use of additional services or products will benefit their organisation
 - 4.4 Identify the main factors that influence customers to use their services or products
 - 4.5 Explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
 - 4.6 State how to give appropriate, balanced information to customers about services or products
-

Unit 13 Using email (J/502/4299)

Unit summary	In this unit learners will use email software, tools and techniques to compose and send messages and manage incoming email effectively.
Guided learning hours	15
Credit value	2
Level	1
Mandatory/optional	Optional

The learner will:

- 1 Use email software tools and techniques to compose and send messages

The learner can:

- 1.1 Use software tools to compose and format email messages
 - 1.2 Attach files to email messages
 - 1.3 Send email messages
 - 1.4 Identify how to stay safe and respect others when using email
 - 1.5 Use an address book to store and retrieve contact information
-

The learner can:

- 2 Manage incoming email effectively

The learner will:

- 2.1 Follow guidelines and procedures for using email
 - 2.2 Identify when and how to respond to email messages
 - 2.3 Read and respond to email messages appropriately
 - 2.4 Identify what messages to delete and when to do so
 - 2.5 Organise and store email messages
 - 2.6 Respond appropriately to common email problems
-

Unit 13 Using email (J/502/4299) (cont'd)

Barred units for Using email (J/502/4299)

This unit is barred against the following unit:

- Unit 16 Using email (M/502/4300)
-

Unit 14 Using collaborative technologies (A/502/4378)

Unit summary	In this unit learners will stay safe and secure when working with collaborative technology. They will plan and set up IT tools and devices and prepare collaborative technologies ready for use.
Guided learning hours	20
Credit value	3
Level	1
Mandatory/optional	Optional

The learner will:

- 1 Stay safe and secure when using collaborative technology

The learner can:

- 1.1 Follow guidelines for working with collaborative technology
 - 1.2 Identify risks in using collaborative technology and why it is important to avoid them
 - 1.3 Carry out straightforward checks on others' online identities and different types of information
 - 1.4 Identify when and how to report online safety and security issues
 - 1.5 Identify what methods are used to promote trust
-

The learner will:

- 2 Set up and access IT tools and devices for collaborative working

The learner can:

- 2.1 Set up IT tools and devices that will enable you to contribute to collaborative work
 - 2.2 Identify the purpose for using collaborative technologies and expected outcomes
 - 2.3 Identify which collaborative technology tools and devices to use for different communication media
 - 2.4 Identify what terms and conditions apply to using collaborative technologies
-

Unit 14 Using collaborative technologies (A/502/4378) (cont'd)

The learner will:

- 3 Prepare collaborative technologies for use

The learner can:

- 3.1 Use given details to access collaborative technologies needed for a collaborative task
 - 3.2 Adjust basic settings on collaborative technologies
 - 3.3 Change the environment of collaborative technologies
 - 3.4 Set up and use a data reader to feed information
 - 3.5 Identify what and why permissions are set to allow others to access information
-

The learner will:

- 4 Contribute to tasks using collaborative technologies

The learner can:

- 4.1 Contribute responsibly and actively to collaborative working
 - 4.2 Contribute to producing and archiving the agreed outcome of collaborative working
 - 4.3 Identify when there is a problem with collaborative technologies and where to get help
 - 4.4 Respond to simple problems with collaborative technologies
-

Barred units for Using collaborative technologies (F/502/4379)

This unit is barred against the following unit:

- Unit 17 Using collaborative technologies (A/502/4378)
-

Unit 15 Word processing software (L/502/4627)

Unit summary	In this unit learners will use word processing software tools to format and present documents. Learners will structure information within word processing documents and enter, edit and combine text and other information accurately.
Guided learning hours	20
Credit value	3
Level	1
Mandatory/optional	Optional

The learner will:

- 1 Enter, edit and combine text and other information accurately within word processing documents

The learner can:

- 1.1 Identify what types of information are needed in documents
- 1.2 Identify what templates are available and when to use them
- 1.3 Use keyboard or other input method to enter or insert text and other information
- 1.4 Combine information of different types or from different sources into a document
- 1.5 Enter information into existing tables, forms and templates
- 1.6 Use editing tools to amend document content
- 1.7 Store and retrieve document files effectively, in line with local guidelines and conventions where available

The learner will:

- 2 Structure information within word processing documents

The learner can:

- 2.1 Create and modify tables to organise tabular or numeric information
 - 2.2 Select and apply heading styles to text
-

Unit 15 Word processing software (L/502/4627) (cont'd)

The learner will:

- 3 Use word processing software tools to format and present documents

The learner can:

- 3.1 Identify what formatting to use to enhance presentation of the document
 - 3.2 Select and use appropriate techniques to format characters and paragraphs
 - 3.3 Select and use appropriate page layout to present and print documents
 - 3.4 Check documents meet needs, using IT tools and making corrections as necessary
-

Unit 16 Using email (M/502/4300)

Unit summary	In this unit learners will use email software tools and techniques to compose and send messages and manage incoming email effectively.
Guided learning hours	20
Credit value	3
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Use email software tools and techniques to compose and send messages

The learner can:

- 1.1 Select and use software tools to compose and format email messages, including attachments
 - 1.2 Determine the message size and how it can be reduced
 - 1.3 Send email messages to individuals and groups
 - 1.4 Describe how to stay safe and respect others when using email
 - 1.5 Use an address book to organise contact information
-

The learner will:

- 2 Manage incoming email effectively

The learner can:

- 2.1 Follow guidelines and procedures for using email
 - 2.2 Read and respond to email messages appropriately
 - 2.3 Use email software tools and techniques to automate responses
 - 2.4 Describe how to archive email messages, including attachments
 - 2.5 Organise, store and archive email messages effectively
 - 2.6 Respond appropriately to email problems
-

Barred units for Using email (M/502/4300)

This unit is barred against the following unit:

- Unit 13 Using email (J/502/4299)
-

Unit 17 Using collaborative technologies (F/502/4379)

Unit summary	In this unit learners will stay safe and secure when working with collaborative technology, they will plan and set up IT tools and devices and prepare collaborative technologies for use.
Guided learning hours	30
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Stay safe and secure when working with collaborative technology

The learner can:

- 1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines
- 1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum
- 1.3 Use appropriate methods to promote trust when working collaboratively
- 1.4 Carry out appropriate checks on others' online identities and different types of information
- 1.5 Identify and respond to inappropriate content and behaviour

The learner will:

- 2 Plan and set up IT tools and devices for collaborative working

The learner can:

- 2.1 Describe the purposes for using collaborative technologies
- 2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required
- 2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media
- 2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices
- 2.5 Describe the compatibility issues in different combinations of collaborative tools and devices
- 2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks
- 2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task

Unit 17 Using collaborative technologies (F/502/4379) (cont'd)

The learner will:

- 3 Prepare collaborative technologies for use

The learner can:

- 3.1 Describe what access rights and issues others may have in using collaborative technologies
 - 3.2 Assess what permissions are needed for different users and content
 - 3.3 Set up and use access rights to enable others to access information
 - 3.4 Set up and use permissions to filter information
 - 3.5 Adjust settings so that others can access IT tools and devices for collaborative working
 - 3.6 Select and use different elements to control environments for collaborative technologies
 - 3.7 Select and join networks and data feeds to manage data to suit collaborative tasks
-

The learner will:

- 4 Contribute to tasks using collaborative technologies

The learner can:

- 4.1 Describe rules of engagement for using collaborative technologies
 - 4.2 Enable others to contribute responsibly to collaborative tasks
 - 4.3 Present relevant and valuable information
 - 4.4 Moderate the use of collaborative technologies
 - 4.5 Archive the outcome of collaborative working
 - 4.6 Assess when there is a problem with collaborative technologies and when to get expert help
 - 4.7 Respond to problems with collaborative technologies
-

Barred units for Using collaborative technologies (F/502/4379)

This unit is barred against the following unit:

- Unit title 14 Using collaborative technologies (A/502/4378)
-

Unit 18 Bespoke software (F/502/4396)

Unit summary	In this unit learners will input and combine information, they will use appropriate structures to organise and retrieve information efficiently and use the functions of the software effectively to process and present information.
Guided learning hours	20
Credit value	3
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Input and combine information using bespoke applications

The learner can:

- 1.1 Input relevant information accurately so that it is ready for processing
- 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software
- 1.3 Respond appropriately to data entry error messages

The learner will:

- 2 Use appropriate structures to organise and retrieve information efficiently

The learner can:

- 2.1 Describe what functions to apply to structure and layout information effectively
 - 2.2 Select and use appropriate structures and/or layouts to organise information
 - 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
-

Unit 18 Bespoke software (F/502/4396) (cont'd)

The learner will:

- 3 Use the functions of the software effectively to process and present information

The learner can:

- 3.1 Select and use appropriate tools and techniques to edit, process and format information
- 3.2 Check information meets needs, using IT tools and making corrections as necessary
- 3.3 Select and use appropriate methods to present information

Barred units for Bespoke software (F/502/4396)

This unit is barred against the following unit:

- Unit 10 Deal with customers using bespoke software (L/601/1225)
-

Unit 19 Handling objections and closing sales (M/502/8606)

Unit summary	In this unit learners will understand and be able to handle sales objections and close the sale.
Guided learning hours	22
Credit value	3
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Understand how to handle sales objections

The learner can:

- 1.1 Explain the difference between standard and non-standard sales objections
- 1.2 Explain how to clarify objections and identify potential sales opportunities from them
- 1.3 Describe how to use questioning techniques to explore and resolve customer issues
- 1.4 Explain how to empathise with and reassure the customer
- 1.5 Explain the difference between hypothetical and real objections
- 1.6 Explain how knowledge of products and services can be used to answer objections
- 1.7 Explain how competitor activity may affect the potential sale
- 1.8 Describe how industry/sector pricing structures may have an impact on sales objections
- 1.9 Explain the scope of authority and responsibility when dealing with objections
- 1.10 State who to go to when in need of support to overcome objections

The learner will:

- 2 Understand how to close the sale

The learner can:

- 2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale
 - 2.2 Explain how to perform a trial close
 - 2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
 - 2.4 Explain potential barriers to closing the sale
 - 2.5 Explain a range of ways to close the sale
-

Unit 19 Handling objections and closing sales (M/502/8606) (cont'd)

The learner will:

- 3 Be able to handle objections

The learner can:

- 3.1 Clarify the nature and extent of objections
 - 3.2 Explain to the customer the concessions available within the scope of authority
 - 3.3 Follow organisational procedures for dealing with objections
 - 3.4 Promote the benefits of products and/or services to overcome objections
 - 3.5 Use testimonials to overcome objections
 - 3.6 Refer to those in authority when dealing with objections outside the scope of own authority
-

The learner will:

- 4 Be able to close the sale

The learner can:

- 4.1 Perform a trial close and ask for the order when objections have been met
 - 4.2 Make use of add-on, up-selling or cross-selling opportunities
 - 4.3 Follow organisational procedures for accepting confirmation of an order
-

Unit 20 Time planning in sales (F/502/8559)

Unit summary	Learners will understand how to manage and prioritise time in a sales role, be able to plan own time and evaluate time planning in a sales role.
Guided learning hours	13
Credit value	2
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Understand how to manage and prioritise time in a sales role

The learner can:

- 1.1 Explain the importance of time management and its impact on sales objectives
- 1.2 Describe how a sales team member uses and measures the use of time
- 1.3 Describe best practice time management techniques
- 1.4 Explain how to review the use of time spent on sales activities

The learner will:

- 2 Be able to plan own time in a sales role

The learner can:

- 2.1 Identify own long-term sales commitments and immediate goals
 - 2.2 Identify work-related priorities
 - 2.3 Identify the differences between tasks that are urgent and tasks that are important
 - 2.4 Consolidate tasks to reduce workload and time wastage
 - 2.5 Identify opportunities to gain support from others to complete work
 - 2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency
-

Unit 20 Time planning in sales (F/502/8559) (cont'd)

The learner will:

- 3 Be able to evaluate time planning in a sales role

The learner can:

- 3.1 Identify unnecessary tasks that are not directly related to own objectives
 - 3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time
 - 3.3 Identify productive periods of time
 - 3.4 Identify the opportunities for improving the use of time
-

Unit 21 Selling by telephone – inbound (J/502/8577)

Unit summary	Learners will understand how to sell by telephone, describing the advantages and disadvantages of selling during inbound sales calls. They will be able to prepare for the sales call and identify objectives for selling products and/or services. Learners will be able to identify customer needs and present products and/or services to close the sale.
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Guided learning hours	27
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Understand how to sell by telephone (inbound)

The learner can:

- 1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls
 - 1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons
 - 1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls
 - 1.4 Describe the different methods used to sell benefits during inbound telephone sales calls
-

The learner will:

- 2 Understand how to close the sale during inbound telephone sales calls

The learner can:

- 2.1 Explain how to manage customer behaviour during inbound telephone sales calls
- 2.2 Describe methods for closing sales during inbound telephone sales calls
- 2.3 Explain how to evaluate and measure the success of inbound telephone sales calls
- 2.4 Describe interactive ICT options available to support telephone sales activities

Unit 21 Selling by telephone – inbound (J/502/8577) (cont'd)

The learner will:

- 3 Be able to prepare for the inbound telephone sales call

The learner can:

- 3.1 Identify objectives for selling products and/or services by inbound telephone sales calls
 - 3.2 Organise materials for a call in accordance with the sales call plan
-

The learner will:

- 4 Be able to identify customer needs during inbound telephone sales calls

The learner can:

- 4.1 Greet and respond to callers in accordance with organisational procedures
 - 4.2 Obtain information from customers about their needs
 - 4.3 Assess the potential value of calls and customers
 - 4.4 Identify products and/or services with features and functions that customers need or want
 - 4.5 Identify opportunities for further sales and/or sales of other products and/or services
-

The learner will:

- 5 Be able to present products and/or services to the customer during inbound telephone sales calls

The learner can:

- 5.1 Explain the benefits and features of products and/or services offered
 - 5.2 Interpret the customer's reaction and decide how to progress the sale
-

Unit 21 Selling by telephone – inbound (J/502/8577) (cont'd)

The learner will:

- 6 Be able to deal with sales objections during inbound telephone sales calls

The learner can:

- 6.1 Identify sales objections prior to dealing with the customer
 - 6.2 Clarify objections and identify potential sales opportunities from them
 - 6.3 Deal with customer queries and objections with clear and accurate responses
 - 6.4 Resolve customer queries about the product and/or service
 - 6.5 Reassure the customer to confirm their objections have been overcome
 - 6.6 Develop a positive relationship with the customer and identify and pursue further customer contact
-

The learner will:

- 7 Be able to close the sale during inbound telephone sales calls

The learner can:

- 7.1 Perform a trial close to establish whether or not further objections exist
 - 7.2 Gain commitment from the customer to close the sale
 - 7.3 Complete the formalities of the sale following organisational procedures
 - 7.4 Provide customer feedback and reaction to products and/or services to appropriate people in own organisation
-

Unit 22 Selling by telephone – outbound (J/502/8580)

Unit summary	Learners will understand how to sell by telephone, describing the advantages and disadvantages of selling by outbound telephone sales calls. They will be able to prepare for the sales call and identify objectives for selling products and/or services. Learners will be able to identify customer needs and identify and present products and/or services and close the sale.
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Guided learning hours	27
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Credit value	4
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Level	2
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Mandatory/optional	Optional
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The learner will:

- 1 Understand how to sell by telephone (outbound)

The learner can:

- 1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls
 - 1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons
 - 1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls
 - 1.4 Describe the different methods used to sell benefits during outbound telephone sales calls
-

The learner will:

- 2 Understand how to close the sale during outbound telephone sales calls

The learner can:

- 2.1 Explain how to manage customer behaviour during outbound telephone sales calls
- 2.2 Describe methods for closing sales during outbound telephone sales calls
- 2.3 Explain how to evaluate and measure the success of outbound telephone sales calls
- 2.4 Describe interactive ICT options available to support telephone sales activities

Unit 22 Selling by telephone – outbound (J/502/8580) (cont'd)

The learner will:

- 3 Be able to prepare for the outbound telephone sales call

The learner can:

- 3.1 Identify objectives for selling products and/or services by outbound telephone sales calls
 - 3.2 Use agreed call lists or leads to plan sales calls
 - 3.3 Organise materials for the call in accordance with the sales call plan
-

The learner will:

- 4 Be able to identify customer needs during outbound telephone sales calls

The learner can:

- 4.1 Assess the potential value of calls and customers
 - 4.2 Prioritise calls according to likely customer value and probability of closure
 - 4.3 Obtain information from customers about their needs
 - 4.4 Identify products and/or services with features and functions that customers need or want
 - 4.5 Identify opportunities for further sales and/or sales of other products and/or services
-

The learner will:

- 5 Be able to present products and/or services to the customer during outbound telephone sales calls

The learner can:

- 5.1 Explain the benefits and features of products and or services offered
 - 5.2 Interpret the customer's preferred solution and decide how to progress the sale
-

Unit 22 Selling by telephone – outbound (J/502/8580) (cont'd)

The learner will:

- 6 Be able to deal with sales objections during outbound telephone sales calls

The learner can:

- 6.1 Identify likely sales objections prior to dealing with the customer
 - 6.2 Clarify objections and identify potential sales opportunities from them
 - 6.3 Deal with customer queries and objections with clear and accurate responses
 - 6.4 Resolve customer queries about the product and/or service
 - 6.5 Reassure the customer to confirm their objections have been overcome
 - 6.6 Develop a positive relationship with customers and identify and pursue further customer contact
-

The learner will:

- 7 Be able to close the sale during outbound telephone sales calls

The learner can:

- 7.1 Perform a trial close to establish whether or not further objections exist
 - 7.2 Gain a commitment from the customer
 - 7.3 Complete the formalities of the sale following organisational procedures
 - 7.4 Provide customer feedback and reaction to products or services to appropriate people in own organisation
-

Unit 23 Inputting and accessing sales or marketing data in information systems (D/502/8584)

Unit summary	In this unit learners will understand how to input and access sales or marketing data in information systems and they will understand the use of sales or marketing information sources and systems. Learners will also be able to input and use databases to support sales or marketing activities.
Guided learning hours	15
Credit value	2
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Understand how to input and access sales or marketing data in information systems

The learner can:

- 1.1 Explain the uses of IT in the sales or marketing function
- 1.2 Identify why information is needed for sales or marketing activities
- 1.3 Describe how sufficient, valid and reliable sources of sales or marketing information can be gathered
- 1.4 Explain the reasons for using an established data storage system
- 1.5 Describe the role, advantages and disadvantages of manual and computerised systems
- 1.6 Explain ways of classifying sales or marketing information and the protocol for data storage

The learner will:

- 2 Understand the use of sales or marketing information sources and systems

The learner can:

- 2.1 Explain methods of presenting sales or marketing information
- 2.2 Describe the features of software and hardware used to manage sales or marketing information
- 2.3 Describe how to plan and organise searches for sales or marketing information

Unit 23 Inputting and accessing sales or marketing data in information Systems (D/502/8584)

- 2.4 Explain the implications of entering incorrect sales or marketing data
 - 2.5 Explain why certain types of sales or marketing information are confidential
 - 2.6 Explain the scope of own authority and responsibility when using sales or marketing information and databases
 - 2.7 Explain the actions to be taken in the case of a breach of confidentiality
-

The learner will:

- 3 Be able to input and use databases to support sales or marketing activities

The learner can:

- 3.1 Gather sales or marketing information
 - 3.2 Identify potential information sources that are likely to support planned sales or marketing activities
 - 3.3 Follow organisational procedures to report concerns about security/confidentiality
 - 3.4 Use sales information gathered to support specified sales or marketing activities
 - 3.5 Input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future
-

Unit 24 Maintain customer service through effective handover (Y/601/1227)

Unit summary	In this unit learners will maintain customer service through effective handover. They will agree joint responsibilities in a customer service team and check that customer service actions are seen through by working together with colleagues. Learners will also understand how to maintain customer service through effective handover.
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Guided learning hours	27
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Agree joint responsibilities in a customer service team

The learner can:

- 1.1 Identify services or products they are involved in delivering that rely on effective teamwork
 - 1.2 Identify steps in the customer service delivery process that rely on exchange of information between them and their colleagues
 - 1.3 Agree with colleagues when it is right to pass responsibility for completing a customer service action to another
 - 1.4 Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action
 - 1.5 Identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action
-

Unit 24 Maintain customer service through effective handover (Y/601/1227) (cont'd)

The learner will:

- 2 Check that customer service actions are seen through by working together with colleagues

The learner can:

- 2.1 Access reminders to identify when to check that a customer service action has been completed
- 2.2 Ensure that they are aware of all details of customer service actions their colleague was due to complete
- 2.3 Ask their colleague about the outcome of them completing the customer service action as agreed
- 2.4 Identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed
- 2.5 Work with colleagues to review the way in which customer service actions are shared

The learner will:

- 3 Understand how to maintain customer service through effective handover

The learner can:

- 3.1 Explain their organisation's customer service procedures for the services or products they are involved in delivering
 - 3.2 Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions
 - 3.3 Describe ways of ensuring that information is passed between them and their colleagues effectively
 - 3.4 Identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague
 - 3.5 Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting
 - 3.6 Identify opportunities for contributing to review the way customer service actions are shared in customer service processes
-

Unit 25 Resolve customer service problems (M/601/1511)

Unit summary	In this unit learners will resolve customer service problems. They will listen carefully to customers about any problem they have raised, pick the best solution and take action.
Guided learning hours	40
Credit value	6
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Spot customer service problems

The learner can:

- 1.1 Listen carefully to customers about any problem they have raised
- 1.2 Ask customers about the problem to check their understanding
- 1.3 Recognise repeated problems and alert the appropriate authority
- 1.4 Share customer feedback with others to identify potential problems before they happen
- 1.5 Identify problems with systems and procedures before they begin to affect customers

The learner will:

- 2 Pick the best solution to resolve customer service problems

The learner can:

- 2.1 Identify the options for resolving a customer service problem
 - 2.2 Work with others to identify and confirm the options to resolve a customer service problem
 - 2.3 Work out the advantages and disadvantages of each option for their customer and the organisation
 - 2.4 Pick the best option for their customer and the organisation
 - 2.5 Identify for their customer other ways that problems may be resolved if they are unable to help
-

Unit 25 Resolve customer service problems (M/601/1511) (cont'd)

The learner will:

- 3 Take action to resolve customer service problems

The learner can:

- 3.1 Discuss and agree the options for solving the problem with their customer
 - 3.2 Take action to implement the option agreed with their customer
 - 3.3 Work with others and their customer to make sure that any promises related to solving the problem are kept
 - 3.4 Keep their customer fully informed about what is happening to resolve the problem
 - 3.5 Check with their customer to make sure the problem has been resolved to the customer's satisfaction
 - 3.6 Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction
-

The learner will:

- 4 Know how to resolve customer service problems

The learner can:

- 4.1 Describe organisational procedures and systems for dealing with customer service problems
 - 4.2 Explain how to defuse potentially stressful situations
 - 4.3 Describe how to negotiate
 - 4.4 Identify the limitations of what they can offer their customer
 - 4.5 Describe types of action that may make a customer problem worse and should be avoided
-

Unit 26 Process information about customers (H/601/1215)

Unit summary	In this unit learners will collect information about customers. They will select and retrieve information about customers, supply accurate and sufficient information about customers and understand how to process customer service information.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Collect information about customers

The learner can:

- 1.1 Collect and record new information about customers following the organisation's guidelines
- 1.2 Update existing information about customers
- 1.3 Record and store information about customers that is accurate, sufficient and relevant following organisational guidelines

The learner will:

- 2 Select and retrieve information about customers

The learner can:

- 2.1 Respond promptly to authorised requests for information about customers
- 2.2 Select and retrieve relevant information for customers or colleagues following the organisation's guidelines

The learner will:

- 3 Supply information about customers

The learner can:

- 3.1 Supply accurate and sufficient information about customers to meet their customers' or colleagues' expectations
- 3.2 Choose the most appropriate way to supply information to their customers or colleagues
- 3.3 Confirm that their customers or colleagues have received and understood the customer information

Unit 26 Process information about customers (H/601/1215) (cont'd)

The learner will:

- 4 Understand how to process customer service information

The learner can:

- 4.1 Describe their organisation's procedures and guidelines for collecting, retrieving and supplying information about customers
 - 4.2 Identify types of personal information about customers that should and should not be kept on record
 - 4.3 Explain how to collect information about customers efficiently and effectively
 - 4.4 Explain how to operate the customer information storage system
 - 4.5 Explain why processing information about customers correctly makes an important contribution to effective customer service
 - 4.6 Explain the importance of attention to detail when processing information about customers
 - 4.7 Describe legal and regulatory restrictions on the storage and use of customer data
-

Unit 27 Deliver customer service to difficult customers (T/601/1512)

Unit summary	In this unit learners will understand how to deliver customer service to difficult customers. They will also recognise when customers may be difficult to deal with.
Guided learning hours	40
Credit value	6
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Recognise when customers may be difficult to deal with

The learner can:

- 1.1 Recognise types of customer behaviour that are difficult to deal with
- 1.2 Identify aspects of their organisation's services or products that make it difficult to deal with customers
- 1.3 Identify the signs and signals that indicate a customer may be difficult to deal with
- 1.4 Put themselves in their customer's position and see the situation from the customer's point of view
- 1.5 Identify reasons why their customers may be behaving in a way that is difficult to deal with
- 1.6 Recognise the limits of difficult customer behaviour that their organisation will tolerate
- 1.7 Identify things that they may do or say that will provoke difficult responses from their customer

The learner will:

- 2 Deal with difficult customers

The learner can:

- 2.1 Listen patiently to what their customer wants to tell them
- 2.2 Use direct and factual questions about their customer's feelings and what has happened to identify what might satisfy the customer
- 2.3 Check their understanding of their customer's concerns by describing their view of the situation and options that might be available
- 2.4 Express empathy with their customer without necessarily admitting fault on the part of their organisation
- 2.5 Give clear statements or explanations of their organisation's position

Unit 27 Deliver customer service to difficult customers (T/601/1512) (cont'd)

- 2.6 Agree a way forward that balances customer satisfaction with the needs of their organisation
 - 2.7 Enlist help from colleagues if options for action are outside of their authority
 - 2.8 Summarise clearly actions to be taken and reasons for those actions to complete the customer transaction
 - 2.9 Advise their manager or the appropriate colleagues if the customer is likely to re-open the matter with them
 - 2.10 Take any necessary action to protect their own safety or that of other customers or colleagues from a difficult customer
-

The learner will:

- 3 Understand how to deliver customer service to difficult customers

The learner can:

- 3.1 Describe the types of customer behaviour that they personally find difficult to deal with
 - 3.2 Identify reasons why some aspect of their organisation's services or products may provoke difficult behaviour from customers
 - 3.3 Identify reasons why their customer's own actions may cause them to behave in a way that is difficult to deal with
 - 3.4 Explain the meaning of having empathy for a customer's feelings
 - 3.5 Identify who can be asked for help when dealing with a difficult customer
 - 3.6 Explain the difference between assertive, aggressive and passive behaviour
 - 3.7 Describe the importance of not simply quoting their organisation's rules and procedures to counter their customer's difficult behaviour
 - 3.8 State their organisation's limits of what will be tolerated from difficult customers before the transaction or relationship is closed
 - 3.9 Explain the importance of giving their manager or the appropriate colleagues notice of any further approaches from a difficult customer
 - 3.10 Identify when it might be necessary to take action to protect their own safety or that of other customers or colleagues from a difficult customer
-

Unit 28 Buddy a colleague to develop their customer service skills (M/601/1542)

Unit summary	Learners will plan and prepare to buddy a colleague, and they will support their buddy on and off the job. They will also understand how to buddy a colleague to develop their customer service skills.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Plan and prepare to buddy a colleague

The learner can:

- 1.1 Agree with their colleague aspects of the colleague's work which may benefit most from their buddying support
- 1.2 Confirm their understanding of their colleague's job tasks and responsibilities using reliable sources
- 1.3 Clarify the customer service image and impression their colleague should present in their job
- 1.4 Arrange times when it will be most helpful to work alongside their colleague
- 1.5 Plan details of a buddy session to support their colleague on the job

The learner will:

- 2 Support their buddy colleague on the job

The learner can:

- 2.1 Agree with their colleague where they will be placed near them when buddying them on the job
- 2.2 Ensure their presence when their buddy is dealing with customers does not detract from effective customer service
- 2.3 Carry out customer service tasks in the presence of their buddy colleague to set an example the colleague can follow
- 2.4 Observe their colleague closely to identify what they do well and areas in which they could improve

Unit 28 Buddy a colleague to develop their customer service skills (M/601/1542) (cont'd)

- 2.5 Discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement
 - 2.6 Praise their colleague on aspects of work which they have carried out well
 - 2.7 Explain to their colleague ways in which they can improve their customer service performance
 - 2.8 Make notes on their colleague's strengths and areas for development that they can discuss with their colleague
-

The learner will:

- 3 Provide buddy support off the job

The learner can:

- 3.1 Arrange suitable times to meet with their buddy colleague when they are not directly engaged with customers
 - 3.2 Identify areas of general interest that help to establish rapport with their buddy colleague
 - 3.3 Use notes made when observing their colleague to discuss positive and negative aspects of their colleague's performance
 - 3.4 Agree actions their buddy colleague can take to improve their customer service performance
 - 3.5 Offer hints and tips on effective customer service actions to their buddy colleague drawn from their own experience
-

The learner will:

- 4 Understand how to buddy a colleague to develop their customer service skills

The learner can:

- 4.1 Identify the tasks in their buddy colleague's job
- 4.2 Identify areas of the job that benefit most from buddying support
- 4.3 Describe the customer service image and impression that should be presented in their buddy colleague's job

**Unit 28 Buddy a colleague to develop their customer service skills
(M/601/1542) (cont'd)**

- 4.4 Identify the best times at which to work alongside their buddy colleague
 - 4.5 Identify ways to work alongside their buddy colleague without intruding on the customer relationship
 - 4.6 Describe techniques for giving positive feedback and constructive criticism to their buddy colleague
 - 4.7 Explain the importance of establishing an effective rapport with their buddy colleague
 - 4.8 Review options for actions their buddy colleague can take to improve their customer service performance
-

Unit 29 Develop your own customer service skills through self-study (R/601/1548)

Unit summary	In this unit learners will develop customer service skills through self-study. They will find ways to learn more about customer service and their job. They will also use sources of self-development to extend their customer skills and knowledge.
Guided learning hours	40
Credit value	6
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Find ways to learn more about customer service and their job

The learner can:

- 1.1 Identify different sources of information and support that will help them to develop their customer service knowledge and skills
- 1.2 Agree with their line manager, their mentor or others doing a similar job the best sources to use for self-development of their customer service knowledge and skills
- 1.3 Take action to remind themselves to check on sources of information and support
- 1.4 Search for additional sources of information to support their customer service learning
- 1.5 Store materials that support self-study for future use
- 1.6 Plan time to study the self-study materials they have collected

The learner will:

- 2 Use sources of self-development to extend their customer service skills and knowledge

The learner can:

- 2.1 Access organisational update information to extend their knowledge of products and services
- 2.2 Access organisational information to learn more about the way their role contributes to customer service
- 2.3 Monitor publications to identify ideas and new developments in customer service which they could apply in their work
- 2.4 Study collected information to develop their own customer service knowledge and skills

Unit 29 Develop your own customer service skills through self-study (R/601/1548) (cont'd)

- 2.5 Take action resulting from their learning to change the way they deal with customers
 - 2.6 Share their plans for action with their line manager, their mentor or others doing a similar job to seek those people's ideas for further options
 - 2.7 Record actions they take to learn more about customer service and identify those which have the most positive effects
-

The learner will:

- 3 Know how to develop their own customer service skills through self-study

The learner can:

- 3.1 Describe ways to locate information updating them on services and products in their information
 - 3.2 Identify sources of information about customer service knowledge and skills that will help them to develop
 - 3.3 List ways to store information that they use to develop their customer service skills
 - 3.4 Describe the importance of focus when self-studying to improve their customer service knowledge and skills
 - 3.5 Identify ways to convert information or ideas they have found through self-study into practical customer service actions
 - 3.6 Identify the value of discussing their learning with their line manager, their mentor or others doing a similar job
 - 3.7 Evaluate methods of recording actions to improve their customer service skills which have had positive effects
-

Unit 30 Give customers a positive impression of yourself and your organisation (L/601/0933)

Unit summary	In this unit learners will establish rapport and respond appropriately to customers. They will communicate information to customers and understand how to give customers a positive impression of themselves and the organisation.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Establish rapport with customers

The learner can:

- 1.1 Meet their organisation's standards of appearance and behaviour
- 1.2 Greet their customer respectfully and in a friendly manner
- 1.3 Communicate with their customer in a way that makes them feel valued and respected
- 1.4 Identify and confirm their customer's expectations
- 1.5 Treat their customer courteously and helpfully at all times
- 1.6 Keep their customer informed and reassured
- 1.7 Adapt their behaviour to respond to different customer behaviour

The learner will:

- 2 Respond appropriately to customers

The learner can:

- 2.1 Respond promptly to a customer seeking help
 - 2.2 Choose the most appropriate way to communicate with their customer
 - 2.3 Check with their customer that they have fully understood their expectations
 - 2.4 Respond promptly and positively to their customer's questions and comments
 - 2.5 Allow their customer time to consider their response and give further explanation when appropriate
-

Unit 30 Give customers a positive impression of yourself and your organisation (L/601/0933) (cont'd)

The learner will:

- 3 Communicate information to customers

The learner can:

- 3.1 Quickly find information that will help their customer
 - 3.2 Give their customer information they need about the services or products offered by their organisation
 - 3.3 Recognise information that their customer might find complicated and check whether they fully understand
 - 3.4 Explain clearly to their customers any reasons why their expectations cannot be met
-

The learner will:

- 4 Understand how to give customers a positive impression of themselves and the organisation

The learner can:

- 4.1 Describe their organisation's standards for appearance and behaviour
 - 4.2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately
 - 4.3 Identify their organisation's rules and procedures regarding the methods of communication they use
 - 4.4 Explain how to recognise when a customer is angry or confused
 - 4.5 Identify their organisation's standards for timeliness in responding to customer questions and requests for information
-

Unit 31 Support customers using on-line customer services (H/601/1540)

Unit summary	Learners will establish the type and level of support their customer needs to achieve on-line customer service. They will support on-line customer service in conversation with their customer and understand how to support customers.
Guided learning hours	33
Credit value	5
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Establish the type and level of support their customer needs to achieve on-line customer service

The learner can:

- 1.1 Ensure that they are up-to-date with the on-line services that their customers use
- 1.2 Identify what the customer is trying to achieve and what they are having difficulties with
- 1.3 Question their customer to discover the customer's degree of familiarity with the system
- 1.4 Offer their customer the option of trying the on-line approach once more
- 1.5 Agree with their customer the exact nature of the problem and steps that may be taken to overcome it

The learner will:

- 2 Support on-line customer service in conversation with their customer

The learner can:

- 2.1 Explore the on-line customer system in order to develop their own knowledge and skills in its use
- 2.2 Step through the screen sequence with their customer whilst allowing them to operate the system for themselves
- 2.3 Address their customer in an understanding and supportive manner
- 2.4 Explain to their customer why certain steps are required in the process
- 2.5 Offer the options to their customer of stepping them through the process or completing the transaction themselves
- 2.6 Promote access to additional services or products when supporting customers on-line

Unit 31 Support customers using on-line customer services (H/601/1540) (cont'd)

The learner will:

- 3 Understand how to support customers using on-line services

The learner can:

- 3.1 Explain how their organisation's system for on-line service delivery works
 - 3.2 Describe the importance of close active listening to discover what their customer is trying to achieve
 - 3.3 Identify ways to communicate clearly with customers who have different levels of skills and understanding of the on-line system
 - 3.4 Explain why it is generally preferable for their customer to complete a transaction for themselves
 - 3.5 Explain the importance of building customer confidence in using the on-line system by supporting and encouraging
 - 3.6 Compare the benefits and drawbacks of talking a customer through use of the system or completing the transaction themselves
 - 3.7 Identify additional services or products that may be promoted to on-line customers
-

Unit 32 Follow the rules to deliver customer service (L/601/1614)

Unit summary	In this unit learners will follow their organisation's customer service practices and procedures, recognising the limits of what they are allowed to do and refer to somebody in authority when they need to.
Guided learning hours	30
Credit value	4
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Follow their organisation's customer service practices and procedures

The learner can:

- 1.1 Follow organisational practices and procedures that relate to their customer service work
 - 1.2 Recognise the limits of what they are allowed to do when delivering customer service
 - 1.3 Refer to somebody in authority when they need to
 - 1.4 Work in a way that protects the security of customers and their property
 - 1.5 Work in a way that protects the security of information about customers
-

**Unit 32 Follow the rules to deliver customer service (L/601/1614)
(cont'd)**

The learner will:

- 2 Know how to follow the rules to deliver customer service

The learner can:

- 2.1 Describe organisational practices and procedures that relate to their customer service work
 - 2.2 Identify the limits of what they are allowed to do when delivering customer service
 - 2.3 Explain when and how they should refer to somebody in authority about the rules for delivering customer service
 - 2.4 Explain how they protect the security of customers and their property
 - 2.5 Explain how they protect the security of information about customers
 - 2.6 Describe their health and safety responsibilities as they relate to their customer service work
 - 2.7 Explain their responsibilities to deliver customer service treating customers equally
 - 2.8 Explain why it is important to respect customer and organisation confidentiality
 - 2.9 List the main things they must do and not do in their job under legislation that affects their customer service work
 - 2.10 List the main things that they must do and not do in their job under external regulations that affect their customer service work
-

Unit 33 Process customer service complaints (D/601/1522)

Unit summary	In this unit learners will process customer service complaints. They will recognise the signs that a query or problem is about to produce a complaint and deal with a complaint effectively.
Guided learning hours	40
Credit value	6
Level	3
Mandatory/optional	Optional

The learner will:

- 1 Recognise the signs that a query or problem is about to produce a complaint

The learner can:

- 1.1 Identify signs that a customer is becoming dissatisfied with the customer service of their organisation
- 1.2 Take action to change the situation so that the query or problem does not result in a complaint
- 1.3 Take actions to change their customer service approach in order to avoid future complaints when a justified complaint has been made

The learner will:

- 2 Deal with a complaint effectively

The learner can:

- 2.1 Ensure that they have a clear understanding of the nature and details of the complaint
- 2.2 Investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint
- 2.3 Identify all the possible options for a solution and consider the benefits and drawbacks of each option for their customer and for their organisation
- 2.4 Assess the risks to their organisation of choosing each option
- 2.5 Report the findings of their investigation to their customer and offer their chosen solution
- 2.6 Escalate the complaint by involving more senior members of their organisation or an independent third party if there is sufficient reason to do so
- 2.7 Give feedback to other colleagues involved which will help them avoid future complaints
- 2.8 Keep clear records of the way the complaint has been handled to avoid later misunderstandings

Unit 33 Process customer service complaints (D/601/1522) (cont'd)

The learner will:

- 3 Understand how to process customer service complaints

The learner can:

- 3.1 Explain how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery
 - 3.2 Explain why dealing with complaints is an inevitable part of delivering customer service
 - 3.3 Describe organisational procedures for dealing with complaints
 - 3.4 Explain how to negotiate a solution with their customer that is acceptable to that customer and to the organisation
 - 3.5 Explain the regulatory definition of a complaint in their sector and the regulatory requirements of how complaints should be handled and reported
 - 3.6 Explain when to escalate a complaint by involving more senior members of the organisation or an independent third party
 - 3.7 Explain the cost and regulatory implications of admitting liability for an error made by their organisation
 - 3.8 Identify how to spot and interpret signals that their customer may be considering making a complaint
 - 3.9 Describe techniques for handling conflict
 - 3.10 Explain the importance of dealing with a complaint promptly
 - 3.11 Explain why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint
 - 3.12 Explain how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied
-

Unit 34 Work with others to improve customer service (D/601/1553)

Unit summary	In this unit learners will improve customer service by working with others. They will also monitor their own and team performance when improving customer service.
Guided learning hours	53
Credit value	8
Level	3
Mandatory/optional	Optional

The learner will:

- 1 Improve customer service by working with others

The learner can:

- 1.1 Contribute constructive ideas for improving customer service
- 1.2 Identify what they have to do to improve customer service and confirm this with others
- 1.3 Agree with others what they have to do to improve customer service
- 1.4 Co-operate with others to improve customer service
- 1.5 Keep their commitments made to others
- 1.6 Make others aware of anything that may affect plans to improve customer service

The learner will:

- 2 Monitor their own performance when improving customer service

The learner can:

- 2.1 Discuss with others how what they do affects customer service performance
 - 2.2 Identify how the way they work with others contributes towards improving customer service
-

Unit 34 Work with others to improve customer service (D/601/1553) (cont'd)

The learner will:

- 3 Monitor team performance when improving customer service

The learner can:

- 3.1 Discuss with others how teamwork affects customer service performance
 - 3.2 Work with others to collect information on team customer service performance
 - 3.3 Identify with others how customer service teamwork could be improved
 - 3.4 Take action with others to improve customer service performance
-

The learner will:

- 4 Understand how to work with others to improve customer service

The learner can:

- 4.1 Describe who else is involved either directly or indirectly in the delivery of customer service
 - 4.2 Describe the roles and responsibilities of others in their organisation
 - 4.3 Describe the roles of others outside their organisation who have an impact on their services or products
 - 4.4 Evaluate what the goals or targets of their organisation are in relation to customer service and how these are set
 - 4.5 Evaluate how their organisation identifies improvements in customer service
-

Unit 35 Develop working relationships with colleagues (H/600/9660)

Unit summary	In this unit learners will understand the benefits of working with colleagues. They will act in a professional and respectful manner and be able to identify potential work-related difficulties and explore solutions.
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Guided learning hours	15
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Credit value	3
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Level	2
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Mandatory/optional	Optional
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The learner will:

- 1 Understand the benefits of working with colleagues

The learner can:

- 1.1 Describe the benefits of productive working relationships
-

The learner will:

- 2 Be able to establish working relationships with colleagues

The learner can:

- 2.1 Identify colleagues within own and other organisations
 - 2.2 Agree the roles and responsibilities for colleagues
-

The learner will:

- 3 Be able to act in a professional and respectful manner when working with colleagues

The learner can:

- 3.1 Explain how to display behaviour that shows professionalism
-

**Unit 35 Develop working relationships with colleagues (H/600/9660)
(cont'd)**

The learner will:

- 4 Be able to communicate with colleagues

The learner can:

- 4.1 Identify information to others clearly and concisely
 - 4.2 Explain how to receive and clarify own understanding of information
-

The learner will:

- 5 Be able to identify potential work-related difficulties and explore solutions

The learner can:

- 5.1 Identify potential work-related difficulties and conflicts of interest
 - 5.2 Explain how to resolve identified potential difficulties
-

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Unit 36 IT communication fundamentals (Y/502/4291)

Unit summary	In this unit learners will use a variety of sources of information to meet needs. They will access, navigate and search Internet sources of information purposefully and effectively. They will also select and use IT to communicate and exchange information.
Guided learning hours	15
Credit value	2
Level	1
Mandatory/optional	Optional

The learner will:

- 1 Use a variety of sources of information to meet needs

The learner can:

- 1.1 Use appropriate sources of IT-based and other forms of information to meet needs
 - 1.2 Identify different features of information
 - 1.3 Recognise copyright constraints on the use of information
-

The learner will:

- 2 Access, search for, select and use Internet-based information and assess its fitness for purpose

The learner can:

- 2.1 Access, navigate and search Internet sources of information purposefully and effectively
 - 2.2 Use appropriate search techniques to locate and select relevant information
 - 2.3 Outline how the information meets requirements and is fit for purpose
-

The learner will:

- 3 Select and use IT to communicate and exchange information

The learner can:

- 3.1 Create, access, read and respond appropriately to email and other IT-based communication
- 3.2 Use IT tools to maintain an address book and schedule activities

Unit 36 IT communication fundamentals (Y/502/4291)

Barred units for IT communication fundamentals (Y/502/4291)

This unit is barred against the following unit:

- IT communication fundamentals (D/502/4292)
-

Unit 37 Using the Internet (T/502/4296)

Unit summary	In this unit learners will connect to the Internet, use browser software to navigate webpages and search for information from the Internet and communicate information online. They will also follow and understand the need for safety and security practices when working online.
Guided learning hours	20
Credit value	3
Level	1
Mandatory/optional	Optional

The learner will:

- 1 Connect to the Internet

The learner can:

- 1.1 Identify different types of connection methods that can be used to access the Internet
- 1.2 Access the Internet or intranet

The learner will:

- 2 Use browser software to navigate webpages

The learner can:

- 2.1 Use browser tools to navigate webpages
- 2.2 Identify when to change browser settings to aid navigation
- 2.3 Adjust browser settings to meet needs
- 2.4 Use browser help facilities

The learner will:

- 3 Use browser tools to search for information from the Internet

The learner can:

- 3.1 Select and use appropriate search techniques to locate information
 - 3.2 Outline how information meets requirements
 - 3.3 Use references to make it easier to find information another time
 - 3.4 Download and save different types of information from the Internet
-

Unit 37 Using the Internet (T/502/4296) (cont'd)

The learner will:

- 4 Use browser software to communicate information online

The learner can:

- 4.1 Select and use tools and techniques to communicate information online
 - 4.2 Use browser tools to share information sources with others
 - 4.3 Submit information online using forms or interactive sites
 - 4.4 Identify opportunities to post or publish material to websites
-

The learner will:

- 5 Follow and understand the need for safety and security practices when working online

The learner can:

- 5.1 Identify the threats to user safety when working online
 - 5.2 Outline how to minimise Internet security risks
 - 5.3 Work responsibly and take appropriate safety and security precautions when working online
 - 5.4 Keep personal information secure
 - 5.5 Follow relevant laws, guidelines and procedures for the use of the Internet
-

Barred units for Using the Internet (T/502/4296)

This unit is barred against the following unit(s):

- Using the Internet (A/502/4297)
-

Unit 38 Using the Internet (A/502/4297)

Unit summary	In this unit learners will connect to the Internet, use browser software to navigate webpages and search for information from the Internet and communicate information online. They will also understand the need for and follow safety and security practices when working online.
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Guided learning hours	30
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Credit value	4
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Level	2
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Mandatory/optional	Optional
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The learner will:

- 1 Connect to the Internet

The learner can:

- 1.1 Identify different types of connection methods that can be used to access the Internet
 - 1.2 Identify the benefits and drawbacks of the connection method used
 - 1.3 Get online with an Internet connection
 - 1.4 Use help facilities to solve Internet connection problems
-

The learner will:

- 2 Use browser software to navigate webpages effectively

The learner can:

- 2.1 Select and use browser tools to navigate webpages
 - 2.2 Identify when to change settings to aid navigation
 - 2.3 Adjust browser settings to optimise performance and meet needs
 - 2.4 Identify ways to improve the performance of a browser
-

Unit 38 Using the Internet (A/502/4297) (cont'd)

The learner will:

- 3 Use browser tools to search for information from the Internet

The learner can:

- 3.1 Select and use appropriate search techniques to locate information efficiently
 - 3.2 Describe how well information meets requirements
 - 3.3 Manage and use references to make it easier to find information another time
 - 3.4 Download, organise and store different types of information from the Internet
-

The learner will:

- 4 Use browser software to communicate information online

The learner can:

- 4.1 Identify opportunities to create, post or publish material to websites
 - 4.2 Select and use appropriate tools and techniques to communicate information online
 - 4.3 Use browser tools to share information sources with others
 - 4.4 Submit information online
-

The learner will:

- 5 Understand the need for safety and security practices when working online

The learner can:

- 5.1 Describe the threats to system performance when working online
- 5.2 Work responsibly and take appropriate safety and security precautions when working online
- 5.3 Describe the threats to information security when working online
- 5.4 Manage personal access to online sources securely
- 5.5 Describe the threats to user safety when working online
- 5.6 Describe how to minimise Internet security risks
- 5.7 Apply laws, guidelines and procedures for safe and secure Internet use
- 5.8 Explain the importance of the relevant laws affecting Internet users

Unit 38 Using the Internet (A/502/4297) (cont'd)

Barred units for Using the Internet (A/502/4297)

This unit is barred against the following unit:

- Using the Internet (T/502/4296)
-

Unit 39 IT communication fundamentals (D/502/4292)

Unit summary	In this unit learners will use a variety of sources of information to meet needs. They will access, select and use Internet-based information and evaluate its fitness for purpose. They will also select and use IT to communicate and exchange information safely, responsibly and effectively.
Guided learning hours	15
Credit value	2
Level	2
Mandatory/optional	Optional

The learner will:

- 1 Select and use a variety of sources of information to meet needs

The learner can:

- 1.1 Select and use appropriate sources of IT-based and other forms of information which match requirements
- 1.2 Describe different features of information
- 1.3 Recognise copyright and other constraints on the use of information

The learner can:

- 2 Access, search for, select and use Internet-based information and evaluate its fitness for purpose

The learner will:

- 2.1 Access, navigate and search Internet sources of information purposefully and effectively
 - 2.2 Use appropriate search techniques to locate relevant information
 - 2.3 Use discrimination to select information that matches requirements and is fit for purpose
 - 2.4 Evaluate information to make sure it matches requirements and is fit for purpose
-

Unit 39 IT communication fundamentals (D/502/4292) (cont'd)

The learner will:

- 3 Select and use IT to communicate and exchange information safely, responsibly and effectively

The learner can:

- 3.1 Create, access, read and respond appropriately to email and other IT-based communication, including attachments, and adapt style to suit audience
- 3.2 Use IT tools to manage an address book and schedule activities
- 3.3 Manage storage of IT-based communications
- 3.4 Describe how to respond to common IT-based communication problems
- 3.5 Respond appropriately to common IT-based communication problems

Barred units for IT communication fundamentals (D/502/4292)

This unit is barred against the following unit:

- IT communication fundamentals (Y/502/4291)
-

Section 3

Assessment and Moderation

Assessment and Moderation

How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

This qualification must be assessed in line with the Skills CFA Assessment Strategy for Contact Centres Operations. This document can be downloaded from the qualifications page on our website www.ncfe.org.uk.

The NCFE Level 2 NVQ Certificate in Contact Centre Operations is internally assessed.

Internal assessment

Each learner must create a portfolio of evidence which demonstrates achievement of all the learning outcomes and assessment criteria associated with each unit. On completion of each unit learners must declare that the work produced is their own. The Assessor must countersign this.

The main pieces of evidence for the portfolio could include (in no particular order):

- Assessor observation – completed observational checklists and related action plans
- witness testimony
- learner's proof of work
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- learner and peer reports
- Recognition of Prior Learning (RPL).

You'll also find a variety of assessment and moderation pro formas here: www.ncfe.org.uk/centre-information/assessment-and-moderation-pro-formas.

Evidence may be drawn from actual or simulated situations, where appropriate. Please refer to the Skills CFA Assessment Strategy for Contact Centres Operations for further information. This can be found on the qualifications page of our website www.ncfe.org.uk.

Assessors can use their own methods of assessment as long as they're valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification. Acceptable methods of assessment could be drawn from the list above.

Assessors must be satisfied that learners have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if learners have been successful. Assessors are also responsible for supporting learners through the assessment process.

For approval of methods of internal assessment other than portfolio building, please contact the Quality Assurance team on 0191 239 8000.

Moderation

Moderation is the process by which we confirm that assessment decisions in centres are:

- made by competent and qualified Assessors
- the product of sound and fair assessment practice
- recorded accurately and appropriately.

We do this through:

- internal moderation – which you carry out
- external moderation – which we carry out through our External Moderators who, by supporting you, will make sure that assessments meet nationally agreed standards and that your quality assurance systems continue to meet our centre approval criteria.

The Internal Moderator provides the vital link between the Assessors and the External Moderator and acts as the centre's quality assurance agent.

Section 4

General information

General information

Equal opportunities

NCFE fully supports the principle of equal opportunities and opposes all unlawful or unfair discrimination on the grounds of ability, age, colour, culture, disability, domestic circumstances, employment status, gender, marital status, nationality, political orientation, racial origin, religious beliefs, sexual orientation and social background. NCFE aims to ensure that equality of opportunity is promoted and that unlawful or unfair discrimination, whether direct or indirect, is eliminated both in its own employment practices and in access to its qualifications. A copy of NCFE's Equal Opportunities Policy is available on request.

Diversity, access and inclusion

Our qualifications and associated assessments are designed to be accessible, inclusive and non-discriminatory. NCFE regularly evaluates and monitors the 6 diversity strands (gender, age, race, disability, religion, sexual orientation) throughout the development process as well as throughout the delivery, external moderation and external assessment processes of live qualifications. This ensures that positive attitudes and good relations are promoted, discriminatory language is not used and our assessment procedures are fully inclusive.

Learners who require reasonable adjustments or special consideration should discuss their requirements with their Tutor, who should refer to our Reasonable Adjustments and Special Considerations policy for guidance.

For more information on the Reasonable Adjustments and Special Considerations policy please see our website: www.ncfe.org.uk/centre-information/policies-and-regulations/.

Data protection

NCFE is registered under the Data Protection Act and is committed to maintaining the highest possible standards when handling personal information.

Feedback

Here at NCFE, we're continually looking to review and improve our portfolio of qualifications to make sure they are of a high standard and meeting the needs of both learners and employers.

In order to achieve this and to comply with the requirements of our regulator, Ofqual, we rely on the valuable feedback that you – our centres – provide us with.

For each NCFE qualification you deliver, we would be grateful if you could let us know the following:

- general feedback about the qualification and assessment
- whether the qualification is meeting its intended purpose
- the outcome for the learner – whether they have progressed to further education or into/within employment.

You can provide us with this information by emailing qualificationfeedback@ncfe.org.uk, giving us a call on 0191 239 8000, responding to the next survey we send you, or completing this form: www.ncfe.org.uk/qualifications/qualification-feedback/ – the link is on the right hand side of our main Qualifications page. By doing this, you're playing an important role in helping us continue to develop and enhance our qualifications for the benefit of your learners.

Contact us

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**** To continue to improve our levels of customer service, telephone calls may be recorded.***