

VTCT Level 2 Diploma in Customer Service

Operational start date: **1 November 2014**
Credit value: **45**
Total Qualification Time (TQT): **450**
Guided learning hours (GLH): **245**
Qualification number: **601/4882/2**

Statement of unit achievement

By signing this statement of unit achievement you are confirming that all learning outcomes, assessment criteria and range statements (if/where applicable) have been achieved under specified conditions, and that the evidence gathered is authentic.

This statement of unit achievement table must be completed prior to claiming certification.

Unit code	Date achieved	Learner signature	Assessor initials	IQA signature (if sampled)
Mandatory units				
UBU19				
UBU20				
UBU21				
UBU22				
UBU23				
Optional units				

The qualification

Introduction

The VTCT Level 2 Diploma in Customer Service is ideal if you continually want to deliver and improve the service you offer to your customers. This could assist you in your day to day work, even if customer service is not your main responsibility.

This qualification focuses on the development of the requisite understanding and skills to aid career progression through the application of excellent customer service.

The VTCT Level 2 Diploma in Customer Service provides you with the knowledge and skills to deal with customer problems and how to improve the service you offer. You will develop your knowledge of organisations and how the principles of customer service affects them. The optional units cover a range of subjects from dealing with incoming and outgoing telephone calls to promoting additional products and/or services. The range of units allow you to tailor your learning to meet progression needs for your role.

National Occupational Standards (NOS)

Units in this qualification have been mapped to the relevant NOS (where applicable). This qualification is regulated on the Regulated Qualifications Framework (RQF).

This qualification is approved and supported by the Skills CFA, the sector skills council for the Council for Administration.

Prerequisites

There are no formal prerequisite qualifications that you must have prior to undertaking this qualification.

Your centre will have ensured that you have the required knowledge, understanding and skills to enrol and successfully achieve this qualification.



Progression

On completion of this qualification you may choose to undertake further study; qualifications you could progress to include:

- VTCT Level 3 Diploma in Customer Service
- VTCT Level 3 Diploma in Business Administration
- Advance apprenticeship in customer service or business administration

Alternatively, you may wish to progress into employment in customer service in a supporting role, for example:

- Customer service assistant
- Telesales operative
- Help desk assistant
- Call centre advisor

Qualification structure

Total credits required - 45 (minimum)

All mandatory units must be completed. A minimum of 45 credits must be achieved at level 2 or above.

Mandatory units - 19 credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU19	A/506/2130	Deliver customer service	5	27	2
UBU20	F/506/2131	Understand customers	2	17	2
UBU21	J/506/2132	Principles of customer service	4	34	2
UBU22	A/506/1964	Understand employer organisations	4	40	2
UBU23	L/506/1788	Manage personal performance and development	4	18	2

Optional Group B units - 3 (minimum) credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU24	D/506/2119	Communicate verbally with customers	3	14	2
UBU8	T/506/2126	Communicate with customers in writing	3	20	2

You must complete a minimum of 45 credits: 19 credits from Mandatory Group A, a minimum of 3 credits from Optional Group B and a minimum of 16 credits from Optional Group C. A maximum of 7 credits can come from Optional Group D.



Optional Group C units - 16 (minimum) credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU9	H/506/2154	Deal with incoming telephone calls from customers	3	16	2
UBU10	K/506/2155	Make telephone calls to customers	3	16	2
UBU26	L/506/2133	Promote additional products and/or services to customers	2	14	2
UBU11	R/506/2134	Process information about customers	3	14	2
UBU27	Y/506/2135	Exceed customer expectations	3	15	2
UBU28	T/506/2143	Deliver customer service whilst working on customers' premises	4	20	2
UBU29	T/506/2157	Carry out customer service handovers	3	15	2
UBU30	A/506/2158	Resolve customer service problems	5	22	2
UBU31	F/506/2159	Deliver customer service to challenging customers	3	16	2
UBU32	Y/506/2149	Develop customer relationships	3	18	2
UBU33	T/506/2160	Support customer service improvements	3	12	2
UBU34	A/506/2161	Support customers through real-time online customer service	3	15	2
UBU36	J/506/2163	Use social media to deliver customer service	3	18	2
UBU38	R/506/2151	Resolve customers' complaints	4	22	3
UBU39	D/506/2170	Gather, analyse and interpret customer feedback	5	24	3
UBU35	H/506/2977	Support customers using self-service equipment	3	18	2
UBU37	K/506/2978	Provide post-transaction customer service	5	22	2

You must complete a minimum of 45 credits: 19 credits from Mandatory Group A, a minimum of 3 credits from Optional Group B and a minimum of 16 credits from Optional Group C. A maximum of 7 credits can come from Optional Group D.



Optional Group D units - 7 (maximum) credits					
VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU16	T/505/4673	Health and safety procedures in the workplace	2	16	2
UBU40	L/506/1807	Manage diary systems	2	12	2
UBU41	H/506/1814	Provide reception services	3	15	2
UBU42	L/506/1869	Contribute to the organisation of an event	3	23	2
UBU43	M/506/1895	Buddy a colleague to develop their skills	3	19	2
UBU44	L/506/1905	Employee rights and responsibilities	2	16	2
UBU45	R/506/1789	Develop working relationships with colleagues	3	19	2
UBU46	J/506/1806	Principles of equality and diversity in the workplace	2	10	2
UBU17	M/502/8587	Processing sales orders	2	17	2
UBU18	R/502/8601	Meeting customers' after sales needs	3	14	2
UBU47	M/502/8606	Handling objections and closing sales	3	22	2
UBU48	K/503/0421	Deal with incidents through a contact centre	7	40	2
UBU49	L/503/0394	Carry out direct sales activities in a contact centre	5	15	2
UBU50	H/506/1912	Negotiate in a business environment	4	18	3
UBU51	F/502/4396	Bespoke software	3	20	2

You must complete a minimum of 45 credits: 19 credits from Mandatory Group A, a minimum of 3 credits from Optional Group B and a minimum of 16 credits from Optional Group C. A maximum of 7 credits can come from Optional Group D.

Guidance on assessment

This book contains the mandatory units that make up this qualification. Optional units will be provided in additional booklets (if applicable). Where indicated, VTCT will provide assessment materials. Assessments may be internal or external. The method of assessment is indicated in each unit.

Internal assessment

(any requirements will be shown in the unit)

Assessment is set, marked and internally quality assured by the centre to clearly demonstrate achievement of the learning outcomes. Assessment is sampled by VTCT external quality assurers.

External assessment

(any requirements will be shown in the unit)

Externally assessed question papers completed electronically will be set and marked by VTCT.

Externally assessed hard-copy question papers will be set by VTCT, marked by centre staff and sampled by VTCT external quality assurers.

Assessment explained

VTCT qualifications are assessed and verified by centre staff. Work will be set to improve your practical skills, knowledge and understanding. For practical elements, you will be observed by your assessor. All your work must be collected in a portfolio of evidence and cross-referenced to requirements listed in this record of assessment book.

Your centre will have an internal quality assurer whose role is to check that your assessment and evidence is valid and reliable and meets VTCT and regulatory requirements.

An external quality assurer, appointed by VTCT, will visit your centre to sample and quality-check assessments, the internal quality assurance process and the evidence gathered. You may be asked to attend on a different day from usual if requested by the external quality assurer.

This record of assessment book is your property and must be in your possession when you are being assessed or quality assured. It must be kept safe. In some cases your centre will be required to keep it in a secure place. You and your course assessor will together complete this book to show achievement of all learning outcomes, assessment criteria and ranges.



Creating a portfolio of evidence

As part of this qualification you are required to produce a portfolio of evidence. A portfolio will confirm the knowledge, understanding and skills that you have learnt. It may be in electronic or paper format.

Your assessor will provide guidance on how to prepare the portfolio of evidence and how to show practical achievement and understanding of the knowledge required to successfully complete this qualification. It is this booklet along with the portfolio of evidence that will serve as the prime source of evidence for this qualification.

Evidence in the portfolio may take the following forms:

- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies

All evidence should be documented in the portfolio and cross-referenced to unit outcomes. Constructing the portfolio of evidence should not be left to the end of the course.

Unit assessment methods

This section provides an overview of the assessment methods that make up each unit in this qualification. Detailed information on assessment is provided in each unit.

Mandatory units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU19	Deliver customer service	0	✓	✓
UBU20	Understand customers	0	✗	✓
UBU21	Principles of customer service	0	✗	✓
UBU22	Understand employer organisations	0	✗	✓
UBU23	Manage personal performance and development	0	✗	✓

Optional Group B units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU24	Communicate verbally with customers	0	✓	✓
UBU8	Communicate with customers in writing	0	✗	✓

Unit assessment methods

Optional Group C units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU9	Deal with incoming telephone calls from customers	0	✓	✓
UBU10	Make telephone calls to customers	0	✓	✓
UBU26	Promote additional products and/or services to customers	0	✓	✓
UBU11	Process information about customers	0	✗	✓
UBU27	Exceed customer expectations	0	✓	✓
UBU28	Deliver customer service whilst working on customers' premises	0	✓	✓
UBU29	Carry out customer service handovers	0	✓	✓
UBU30	Resolve customer service problems	0	✓	✓
UBU31	Deliver customer service to challenging customers	0	✓	✓
UBU32	Develop customer relationships	0	✓	✓
UBU33	Support customer service improvements	0	✗	✓
UBU34	Support customers through real-time online customer service	0	✓	✓
UBU36	Use social media to deliver customer service	0	✓	✓
UBU38	Resolve customers' complaints	0	✓	✓
UBU39	Gather, analyse and interpret customer feedback	0	✓	✓
UBU35	Support customers using self-service equipment	0	✓	✓
UBU37	Provide post-transaction customer service	0	✓	✓

Unit assessment methods

Optional Group D units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU16	Health and safety procedures in the workplace	0	✓	✓
UBU40	Manage diary systems	0	✗	✓
UBU41	Provide reception services	0	✓	✓
UBU42	Contribute to the organisation of an event	0	✓	✓
UBU43	Buddy a colleague to develop their skills	0	✓	✓
UBU44	Employee rights and responsibilities	0	✗	✓
UBU45	Develop working relationships with colleagues	0	✓	✓
UBU46	Principles of equality and diversity in the workplace	0	✗	✓
UBU17	Processing sales orders	0	✓	✓
UBU18	Meeting customers' after sales needs	0	✓	✗
UBU47	Handling objections and closing sales	0	✓	✓
UBU48	Deal with incidents through a contact centre	0	✓	✓
UBU49	Carry out direct sales activities in a contact centre	0	✓	✓
UBU50	Negotiate in a business environment	0	✓	✓
UBU51	Bespoke software	0	✗	✓

Unit glossary

	Description
VTCT product code	All units are allocated a unique VTCT product code for identification purposes. This code should be quoted in all queries and correspondence to VTCT.
Unit title	The title clearly indicates the focus of the unit.
National Occupational Standards (NOS)	NOS describe the skills, knowledge and understanding needed to undertake a particular task or job to a nationally recognised level of competence.
Level	Level is an indication of the demand of the learning experience; the depth and/or complexity of achievement and independence in achieving the learning outcomes.
Credit value	This is the number of credits awarded upon successful achievement of all unit outcomes. Credit is a numerical value that represents a means of recognising, measuring, valuing and comparing achievement.
Guided learning hours (GLH)	The activity of a learner in being taught or instructed by - or otherwise participating in education or training under the immediate guidance or supervision of - a lecturer, supervisor, tutor or other appropriate provider of education or training.
Total qualification time (TQT)	The number of hours an awarding organisation has assigned to a qualification for Guided Learning and an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study, or any other form of participation in education or training. This includes assessment, which takes place as directed - but, unlike Guided Learning, not under the immediate guidance or supervision of - a lecturer, supervisor, tutor or other appropriate provider of education or training.
Observations	This indicates the minimum number of competent observations, per outcome, required to achieve the unit.
Learning outcomes	The learning outcomes are the most important component of the unit; they set out what is expected in terms of knowing, understanding and practical ability as a result of the learning process. Learning outcomes are the results of learning.
Evidence requirements	This section provides guidelines on how evidence must be gathered.
Observation outcome	An observation outcome details the tasks that must be practically demonstrated to achieve the unit.
Knowledge outcome	A knowledge outcome details the theoretical requirements of a unit that must be evidenced through oral questioning, a mandatory written question paper, a portfolio of evidence or other forms of evidence.
Assessment criteria	Assessment criteria set out what is required, in terms of achievement, to meet a learning outcome. The assessment criteria and learning outcomes are the components that inform the learning and assessment that should take place. Assessment criteria define the standard expected to meet learning outcomes.

UBU19

Deliver customer service

The aim of this unit is to develop your knowledge, understanding and skills to deliver customer service in an organisation. You will learn how to treat customers as individuals and plan how to deliver a service. You will understand the relationship between the organisation brand and the customer and how this can affect the promises made to the customers.

Level

2

Credit value

5

GLH

27

Observation(s)

2

External paper(s)

0



Deliver customer service

Learning outcomes

On completion of this unit you will:

1. Be able to prepare to deal with customers
2. Be able to provide customer service
3. Be able to support improvements to customer service delivery
4. Understand customer service delivery
5. Understand the relationship between customer service and a brand

Evidence requirements

1. *Environment*
Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*
Simulation is not allowed in this unit.
3. *Observation outcomes*
Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

4. *Knowledge outcomes*
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
5. *Tutor/Assessor guidance*
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.
6. *External paper*
There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

Relationship to National Occupational Standards

Customer Service (2013) National Occupational Standards:

- CFACSA1 Maintain a positive and customer-friendly attitude
- CFACSA2 Behave in a way that gives a good customer service impression
- CFACSA4 Give customers a positive impression of yourself and your organisation
- CFACSA7 Live up to the brand promise when delivering customer service
- CFACSA8 Make customer service personal
- CFACSB1 Do your job in a customer friendly way
- CFACSB2 Deliver reliable customer service
- CFACSF2 Deliver customer service within the rules



Observations

Learning outcome 1

Be able to prepare to deal with customers

You can:

- a. Keep up-to-date with an organisation's products and/or services*
- b. Prepare resources that are necessary to deal with customers before starting work*

* *May be assessed by supplementary evidence.*

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



Learning outcome 2

Be able to provide customer service

You can:

- a. Maintain organisational standards of presentation and behaviour when providing customer service
- b. Adapt your behaviour to meet customers' needs or expectations
- c. Respond to customers' requests in line with organisational guidelines
- d. Inform customers of the progress of their requests
- e. Confirm that customers' expectations have been met in line with the service offer
- f. Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service

*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



Learning outcome 3

Be able to support improvements to customer service delivery

You can:

- a. Identify ways that customer service could be improved for an organisation and individuals*
- b. Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

**This is not an exhaustive list.*

Knowledge



Learning outcome 4

Understand customer service delivery

You can:	Portfolio reference
a. Explain the relationship between customers' needs and expectations and customer satisfaction	
b. Describe the features and benefits of an organisation's products and/or services	
c. Explain the importance of treating customers as individuals	
d. Explain the importance of balancing promises made to customers with the needs of an organisation	
e. Explain when and to whom to escalate problems	
f. Describe methods of measuring your own effectiveness in the delivery of customer service	



Learning outcome 5

Understand the relationship between customer service and a brand

You can:	Portfolio reference
a. Explain the importance of a brand to an organisation	
b. Explain how a brand affects an organisation's customer service offer	
c. Explain the importance of using customer service language that supports a brand promise	
d. Identify your own role in ensuring that a brand promise is delivered	

UBU20

Understand customers

The aim of this unit is to develop your knowledge and understanding of what a customer is. You will learn about the different types of customers and their own individual needs. You will also learn about customer dissatisfaction and how to retain loyal customers.

Level

2

Credit value

2

GLH

17

Observation(s)

0

External paper(s)

0



Understand customers

Learning outcomes

On completion of this unit you will:

1. Understand different types of customers
2. Understand the value of customers and their loyalty

Evidence requirements

1. *Knowledge outcomes*
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
2. *Tutor/Assessor guidance*
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.
3. *External paper*
There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

This unit is linked to the Customer Service (2013) National Occupational Standards.

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand different types of customers

You can:	Portfolio reference
a. Explain the distinctions between internal and external customers	
b. Explain how cultural factors can affect customers' expectations	
c. Describe the characteristics of challenging customers	
d. Explain how to identify dissatisfied customers	



Learning outcome 2

Understand the value of customers and their loyalty

You can:	Portfolio reference
a. Explain how the achievement of the customer service offer contributes to enhancing customer loyalty	
b. Explain the relationship between customer satisfaction and organisational performance	
c. Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services	
d. Explain the potential consequences of customers' dissatisfaction	
e. Describe different methods of attracting customers and retaining their loyalty	

UBU21

Principles of customer service

The aim of this unit is to develop an understanding of the principles of customer service. You will learn the differences between the customer's needs, wants and expectations. You will also learn how to identify the legislations that affect the customer service you provide.

Level

2

Credit value

4

GLH

34

Observation(s)

0

External paper(s)

0



Principles of customer service

Learning outcomes

On completion of this unit you will:

1. Understand customer service
2. Understand how legal and ethical requirements relate to customer service
3. Understand how to deliver effective customer service
4. Understand the management of customer service information

Evidence requirements

1. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

2. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

3. *External paper*

There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

This unit is linked to the Customer Service (2013) National Occupational Standards.

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand customer service

You can:	Portfolio reference
a. Explain the purpose and scope of customer service	
b. Define the term “service offer”	
c. Explain the value of a “service offer” to an organisation	
d. Explain the importance of delivering consistently high quality customer service	
e. Explain the importance of keeping up-to-date with knowledge of competitors’ activities	
f. Explain barriers to providing effective customer service	
g. Describe the features of effective follow-up service	



Learning outcome 2

Understand how legal and ethical requirements relate to customer service

You can:	Portfolio reference
a. Describe how sales and consumer-related legislation and regulations affect the delivery of customer service	
b. Describe how health, safety and environmental legislation affects customer service delivery	
c. Explain how ethical considerations affect customer service	
d. Explain how equality legislation affects customer service	
e. Describe how legislation affects the use and storage of customer information	



Learning outcome 3

Understand how to deliver effective customer service

You can:	Portfolio reference
a. Explain the difference between customers' wants, needs and their expectations	
b. Explain how to identify customers' needs and expectations	
c. Explain the importance of managing customers' expectations	
d. Explain how to behave in a way that meets customers' expectations	
e. Describe techniques that can be used to put customers at ease and gain their trust	
f. Explain the importance of following up actions and keeping promises when delivering customer service	



Learning outcome 4

Understand the management of customer service information

You can:	Portfolio reference
a. Explain how customer service information can be used	
b. Explain the importance of systems to manage customer service information	
c. Explain the uses of systems to manage customer service information	
d. Identify the features of an effective customer complaints process	
e. Describe the uses of a customer complaints process	

UBU22

Understand employer organisations

The aim of this unit is to develop your knowledge and understanding of the functions of different organisational structures. You will learn how to describe the difference between the types of employers and the internal and external influences of an organisation.

Level

2

Credit value

4

GLH

40

Observation(s)

0

External paper(s)

0



Understand employer organisations

Learning outcomes

On completion of this unit you will:

1. Understand organisational structures
2. Understand the organisational environment

Evidence requirements

1. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

2. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

3. *External paper*

There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

Business and administration (2013) National Occupational Standards:

- CFABAF174 Manage work in a business environment

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand organisational structures

You can:	Portfolio reference
a. Explain the differences between the private sector, public sector and voluntary sector	
b. Explain the functions of different organisational structures	
c. Describe the features of different types of legal structures for organisations	



Learning outcome 2

Understand the organisational environment

You can:	Portfolio reference
a. Describe the internal and external influences on organisations	
b. Explain the use of different models of analysis in understanding the organisational environment	
c. Explain why change in the business environment is important	

UBU23

Manage personal performance and development

The aim of this unit is to develop your knowledge and skills to manage your own performance and development. You will learn how to identify your own development needs and research how these can be met. You will also learn how to review your performance and development with your line manager and complete tasks to an agreed timescale and quality standard.

Level

2

Credit value

4

GLH

18

Observation(s)

0

External paper(s)

0



Manage personal performance and development

Learning outcomes

On completion of this unit you will:

1. Be able to manage personal performance
2. Be able to manage your own time and workload
3. Be able to identify your own development needs
4. Be able to fulfil a personal development plan

Evidence requirements

1. *Knowledge outcomes*
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
2. *Tutor/Assessor guidance*
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.
3. *External paper*
There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

Management and Leadership (2012) National Occupational Standards:

- CFAM&LAA1 Manage yourself

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Be able to manage personal performance

You can:	Portfolio reference
a. Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager	
b. Agree criteria for measuring progress and achievement with line manager	
c. Complete tasks to agreed timescales and quality standards	
d. Report problems beyond your own level of competence and authority to the appropriate person	
e. Take action needed to resolve any problems with personal performance	



Learning outcome 2

Be able to manage your own time and workload

You can:	Portfolio reference
a. Plan and manage workloads and priorities using time management tools and techniques	
b. Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives	
c. Explain the benefits of achieving an acceptable “work-life balance”	



Learning outcome 3

Be able to identify your own development needs

You can:	Portfolio reference
a. Identify organisational policies relating to personal development	
b. Explain the need to maintain a positive attitude to feedback on performance	
c. Explain the potential business benefits of personal development	
d. Identify your own preferred learning style(s)	
e. Identify your own development needs from analyses of the role, personal and team objectives	
f. Use feedback from others to identify your own development needs	
g. Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs	



Learning outcome 4

Be able to fulfil a personal development plan

You can:	Portfolio reference
a. Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms	
b. Make use of formal development opportunities that are consistent with business needs	
c. Use informal learning opportunities that contribute to the achievement of personal development objectives	
d. Review progress against agreed objectives and amend plans accordingly	
e. Share lessons learned with others using agreed communication methods	