SPECIFICATION

IAO Level 2 Certificate in Principles of Customer Service
Qualification number: 601/3477/X



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Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

Active Leisure	**Health and Social Care**
Business and Management	**Hospitality and Catering**
Childcare	**IT**
Employability	**Logistics**
Retail	**Education and Training**

We currently offer over 120 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date www.innovateawarding.org

This document will be updated if there are any changes so it is important to make sure you are working from the most up-to-date version, which is available to download from our website

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is recognised as an awarding organisation by the qualifications regulator Ofqual (England).

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800
Email: contactus@innovateawarding.org

"We work with a wide variety of organisations such as employers, training providers, FE colleges and Sector Skills Councils and develop off-the-shelf, customised and bespoke qualifications."

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Qualification summary

Qualification Accreditation Number (QAN)	601/3477/X
Qualification review date	31st March 2021
Guided Learning Hours (GLH)	Minimum 132 hours
Total Qualification Time (TQT)	150 hours
RQF level	2
Qualification credit value	15 credits
Minimum credits at/above level	15 credits
Assessment requirements	Portfolio of Evidence This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).
Aims and objectives of the qualification	The aim of this qualification is to develop learners' knowledge of Customer Service. It provides an insight into the principles of customer service and will aid career development by providing knowledge and understanding of working in this sector. This RQF knowledge based qualification is designed for individuals who are involved in Customer Service as their primary work activity, who are seeking a career in this sector and wish to take the first steps towards professional qualifications. It is also suitable for learners who wish to gain recognition of their knowledge of Customer Service that they can apply to employment in a wide range of sectors.
Entry guidance	There are no formal entry requirements for this qualification. This qualification is suitable for those who work within a number of industries and job roles. It provides Learners with an opportunity to demonstrate their competence and knowledge in a wide range of job roles.

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Progression opportunities	Learners who achieve this qualification could progress into or within employment in a number of customer service roles and/or continue their study in this or other areas. Learners who complete this qualification may go on to further study in related areas such as: • IAO Level 2 Diploma in Customer Service • IAO Level 3 Diploma in Customer Service • IAO Level 2 Diploma in Team Leading
Funding	For details on eligibility for government funding please refer to the following websites: http://www.education.gov.uk/section96/ https://www.gov.uk/government/organisations/skills-funding-agency

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Innovate Awarding

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative…everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org

Feedback

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

Complaints

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint then we recommend you read our Complaints Procedure which can be found on our website.

Fees

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

Enquiries and appeals

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

Data Protection

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

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Equality and Diversity

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

Reasonable Adjustment and Special Consideration

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

Malpractice and Maladministration

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

Recognition of Prior Learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website

Please note the above is not a comprehensive guide to running qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

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The Regulated Qualifications Framework (RQF)

What is the RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

Qualification Level

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

Qualification Size

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels, but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time

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Qualification structure

To achieve the IAO Level 2 Certificate in Principles of Customer Service, learners must complete all of the required four mandatory units to gain the required 15 credits.

The total Guided Learning Hours (GLH) for this qualification is 132 hours.

The Total Qualification Time (TQT) for this qualification is 150 hours.

Unit Structures

All units are listed below

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Mandatory units

Unit ref	Unit title	Level	Credit value	GLH
H/503/0322	Understanding the organisation	2	4	35
M/503/0324	Prepare to deliver excellent customer service	2	4	35
K/503/0323	Communication in the customer service role	2	5	45
F/506/2131	Understand customers	2	2	17

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Title:	**H/503/0322 Understanding the organisation**
Level:	**2**
Credit value:	**4**
GLH:	**35**
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the factors that affect an organisation and the customer service role	1.1 Describe the products and services of commercial, public and third sector organisations 1.2 Describe the differences in customer service between commercial, public and third sector organisations 1.3 Outline the role played by the customer service occupation within the organisation and industry 1.4 Identify the major competitors of the organisation 1.5 Identify factors that can affect the reputation of the organisation
2. Understand employee rights, responsibilities and organisational procedures	2.1 State employer and employee rights and responsibilities under employment law and the importance of having these 2.2 Detail the employer and employee rights and responsibilities under the Health and Safety at Work Act 2.3 Describe the organisation's procedures for health and safety and documentation used 2.4 Outline how the Disability Discrimination Act relates to employment 2.5 Identify other key legislation relating to industry and organisation 2.6 Describe organisational procedures for equality and diversity detailing any monitoring and documentation activity

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3. Understand career pathways within customer service	3.1 Describe the main career pathways available within a customer service role 3.2 Identify sources of information and advice available on the customer service industry, occupations and career progression 3.3 Identify methods of learning available in the organisation to assist in career progression 3.4 Identify the procedure for accessing formal learning programmes and the procedure for challenging refusal if available 3.5 Explain how new customer service situations can aid self-development and career progression
4. Understand how employees are supported within the customer service role	4.1 Identify sources of information and advice on employment rights and responsibilities 4.2 Identify types of representative body related to the industry 4.3 Detail the main roles and responsibilities of each representative body and their relevance to the industry 4.4 Outline sources of support for their role within the organisation to include issues relating to: • Equality • Health and Safety • Career progression
5. Know the organisation's policies and procedures	5.1 Describe the main principles, policies and procedures of their organisation and its documentation 5.2 Explain how the organisation's principles are disseminated to employees 5.3 Outline relevant policies and codes of practice adopted by the organisation and how employees are made aware of this 5.4 Explain how employees are consulted on changes to the principles, procedures and policies within the organisation

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	5.5 Identify issues of public concern relating to their industry and organisation and how these are dealt with
Additional information about this unit N/A	
Unit aim (s)	This unit is aimed at new entrants to the field of customer service. It ensures that learners are aware of procedures, practices and legislation as well as how to identify their needs and support required in order to progress with customer service roles.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Unit F1 – Use Customer Service Language Unit F2 – Follow the rules to deliver Customer Service Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service Unit F5 – Demonstrate understanding of customer service management
Details of the relationship of the unit and relevant national occupational standards	N/A

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Title:	**M/503/0324 Prepare to deliver excellent customer service**
Level:	**2**
Credit value:	**4**
GLH:	**35**
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the principles of customer service in an organisation	1.1 Describe the organisation's products and services 1.2 Explain how customers are made aware of the organisation's offer 1.3 Identify the customers of the organisation 1.4 Explain how to keep up to date with the organisation's offer 1.5 Describe the organisation's policies and procedures relating to customer service and the importance of following them 1.6 Describe the publicity available about the organisation's products and services 1.7 Describe the implications of poor customer service in commercial, public sector and third sector organisations
2. Understand how customer needs and expectations are identified	2.1 Outline ways in which customer expectations can be identified 2.2 Identify how customer expectations can be met within the offer of the organisation 2.3 Describe how to tell customers that their needs cannot be met by the organisation 2.4 Identify reasons for customer service being delayed and the impact of this on customers 2.5 Outline how to tell customers that the service will be delayed 2.6 Explain why it is important to keep customers informed of progress and delays when dealing with a complaint

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3. Understand how to balance customer expectations against the organisation's offer	3.1 Outline the customer service offers of two organisations to include • one commercial organisation • one public or third sector organisation 3.2 Explain how resource and financial implications reflect on the organisation's offer and customers' expectations 3.3 Explain how customers' expectation are arrived at within their organisation's offer 3.4 Identify examples of when customer service may be limited by organisational goals 3.5 Describe how to tell a customer that their service expectations are outside of the organisation's offer
4 Understand how complaints are handled	4.1 Explain why customers may complain to or about an organisation 4.2 Outline the complaints handling procedure in the organisation 4.3 Identify ways in which complaints may be defused prior to escalation to include: • Face to face • Written (letter, email) • Via the telephone 4.4 Outline the effects of complaints on commercial, public sector and third sector organisations 4.5 Explain why complaints are monitored and how the monitoring is used
5 Understand legislation relating to customer service	5.1 Identify customer service related legislation and external regulations and how these may affect customer service 5.2 Outline how business service improvements might be limited by legislation 5.3 Explain how the requirements of the Health and Safety at Work Act (1974) are relevant to customer service 5.4 Explain individual health and safety responsibilities while delivering customer service

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	5.5 Identify ways in which the security of customers and their property can be protected 5.6 Describe how to gain approval to change customer service procedures or practices that are affected by legislation
Additional information about this unit N/A	
Unit aim (s)	This unit is aimed at new entrants to the field of customer service. It ensures that learners are aware of procedures, practices and legislation as well as how to identify and satisfy customer needs.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Unit F1 – Use Customer Service Language Unit F2 – Follow the rules to deliver Customer Service Unit F3 – Demonstrate understanding of Customer Service Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service Unit F6 – Follow organisation rules, legislation and external regulations when managing customer service

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Title:	K/503/0323 Communication in the customer service role
Level:	2
Credit value:	5
GLH:	45
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the methods of communication with customers	1.1 Outline why different situations need different methods of communication 1.2 Identify communication methods suitable for a series of customer interactions 1.3 Identify the advantages and disadvantages of the main communication methods to customers to include • Face to face • In writing • Via telephone 1.4 Outline the content of a standard letter in response to a customer query 1.5 Explain what is meant by active listening and its importance when dealing with customers 1.6 Describe the standard greetings of three organisations and how they impact on customers
2. Understand how to handle customer service information	2.1 Explain what information may be held about customers by an organisation 2.2 Outline how customer information is kept secure and confidential 2.3 Identify information about the organisation that should not be disclosed to customers 2.4 Explain why certain information should not be disclosed to customers and the implications on the organisation if it is

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3. Understand how to work as part of a team to provide effective customer service	3.1 Outline limits of individual role when delivering customer service 3.2 Identify others involved in the customer service function 3.3 Identify sources of assistance for queries outside individual responsibility 3.4 Explain how other team members can assist in offering excellent customer service 3.5 Explain the importance of keeping colleagues and others informed of customer service operations 3.6 Outline how customer queries can aid individual and colleague's development 3.7 Explain how to disseminate customer service information for the benefit of colleagues
4. Understand how to meet the needs of a diverse range of customers	4.1 Identify the main types of customer that may need to be dealt with 4.2 Describe the aids available to assist customers with special requirements 4.3 Outline how to respect cultural diversity in customer service 4.4 Explain how to recognise the following types of customer • Angry • Distressed • Upset • Violent 4.5 Explain how to deal with customers who are • Angry • Distressed • Upset • Violent
5 Understand the importance of promoting and evaluating products and services	5.1 Detail how products and services can be promoted in an organisation 5.2 Explain the importance of evaluating customer service 5.3 Identify methods of evaluation of the customer experience that may be used

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	5.4 Detail how customer feedback is disseminated to colleagues 5.5 Explain how evaluation can lead to customer service improvements
Additional information about this unit N/A	
Unit aim (s)	This unit is aimed at new entrants to the field of customer services. It ensures that they have the necessary knowledge to deal with a variety of customers in different situations. It also ensure the necessary knowledge of information security and of evaluation of customer service.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Unit F1 – Use Customer Service Language Unit F2 – Follow the rules to deliver Customer Service Unit F3 – Demonstrate understanding of Customer Service Unit F4 – Demonstrate understanding of the rules that impact on improvements in customer service Unit F5 – Demonstrate awareness of Customer Service Management

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Title:	**F/506/2131 Understand customers**
Level:	**2**
Credit value:	**2**
GLH:	**17**
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers
2 Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the underpinning knowledge required to understand customers. Upon completion of this unit, learners will have developed an understanding of different types of customers and will also know the value of customers and their loyalty.

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Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards

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