www.highfieldqualifications.com

Qualification Specification

Highfield Level 3 Diploma for Customer Service Skills (RQF)

Qualification Number: 603/4688/7

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Highfield Level 3 Diploma for Customer Service Skills (RQF)

Introduction

This qualification specification is designed to outline all you need to know to offer this qualification at your centre. If you have any further questions, please contact your account manager.

Qualification regulation and support

The Highfield Level 3 Diploma for Customer Service Skills (RQF) has been developed and is awarded by Highfield Qualifications and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual. The qualification is also regulated by Qualifications Wales.

Key facts

Qualification number:	603/4688/7
Learning aim reference:	60346887
Credit value:	42
Assessment method:	Portfolio of Evidence
Guided learning hours (GLH):	250
Total qualification time (TQT):	420

Qualification overview and objective

This qualification has been developed to support learners completing the Customer Service Specialist Apprenticeship Standard and can be used to assess their readiness for end-point assessment. It covers the knowledge, skills and behaviour pass criteria of the standard, as described in Assessment Plan ST0071/AP01. It does not cover any distinction criteria that are part of the Assessment Plan.

This qualification uses the same references for the assessment criteria as used in the Highfield End Point Assessment for Customer Service Specialist. The qualification does not cover any merit or distinction criteria that may be part of the Assessment Plan. Consequently, the numbering of the references may not be sequential.

It is also designed as a stand-alone qualification for those learners wishing to gain a nationally recognised qualification in customer service.

The objective of the qualification is to support a role in the workplace in a customer service environment, giving learners the opportunity to learn and evidence their knowledge and competency either as part of an apprenticeship or as a stand-alone qualification.

The qualification provides learners with the knowledge, understanding and skills in customer service such as:

- customer journey knowledge
- service improvement
- ownership/responsibility

Entry requirements

To register on to this qualification, learners are required to meet the following entry requirements:

- be 16 years of age or above
- have a basic level of literacy and numeracy

Centre requirements

There are no specific requirements for the centre as long as each learner's workplace is suitably equipped for the chosen units to be delivered and assessed.

Guidance on delivery

The total qualification time for this qualification is 420 hours and of this 250 are recommended as guided learning hours.

TQT is an estimate of the total number of hours it would take an average learner to achieve and demonstrate the necessary level of attainment to be awarded with a qualification, both under direct supervision (forming guided learning hours) and without supervision (all other time). TQT and GLH values are advisory and assigned to a qualification as guidance.

Guidance on assessment

The qualification is a combined knowledge and competence qualification. It is assessed through the completion of a portfolio of evidence, which must be internally assessed and quality assured by the centre. A portfolio of evidence gives centres flexibility in how individual assessment criteria are assessed. Additional guidance is included at the bottom of each unit suggesting how assessment criteria can be assessed.

All knowledge-based criteria are pre-fixed with K. The skill and behaviour-based criteria are prefixed either with S for skills or B for behaviour.

Learners must achieve all of the pass criteria across all units, in order to be awarded a Pass. Examples of evidence for the portfolio could include:

Knowledge criteria:

- worksheets
- record of oral and written questioning
- assignments/projects/reports
- candidate and peer reports
- record of professional discussion

Skills and behaviour criteria:

- assessor observation – completed observational checklists
- witness testimony
- record of professional discussion
- candidate and peer reports

Assessors can use other methods of assessment as long as they are valid and reliable

Centres must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Guidance on quality assurance

Highfield Qualifications requires centres to have in place a robust mechanism for internal quality assurance of training delivery and internal assessment processes. Internal quality assurance must be completed by an appropriately qualified person and that person must not have been involved in any aspect of the delivery or assessment of the course they are quality assuring.

Highfield Qualifications will support centres by conducting ongoing engagements to ensure and verify the effective and efficient delivery of the qualification.

Recognition of prior learning (RPL)

Centres may apply to use recognition of prior learning or prior achievement to reduce the amount of time spent in preparing a learner for assessment. For further information on how centres can apply to use RPL as described above, please refer to the Recognition of Prior Learning (RPL) Policy in the members' area of Highfield Qualifications' website. This policy should be read in conjunction with this specification and all other relevant Highfield documentation.

Assessor requirements

Highfield Qualifications strongly recommends nominated assessors for this qualification to meet the following:

- have current, relevant occupational expertise and knowledge that has been gained through 'hands-on' experience in the industry and could include qualifications such as:
  - Highfield Level 3 Certificate in Customer Service
  - Highfield Level 3 Diploma in Customer Service
- hold or be working towards a recognised assessing qualification, which could include any of the following:
  - Level 3 Award in Assessing Competence in the Work Environment
  - Level 3 Certificate in Assessing Vocational Achievement
  - A1 Assess Learner Performance Using a Range of Methods
  - D32 Assess Learner Performance and D33 Assess Learner Using Different Sources of Evidence
- maintain appropriate continued professional development for the subject area

Internal quality assurance (IQA) requirements

Highfield Qualifications strongly recommends internal quality assurers for this qualification to meet the following:

- have current, relevant occupational expertise and knowledge that has been gained through 'hands-on' experience in the industry and could include qualifications such as:
  - Highfield Level 3 Certificate in Customer Service
  - Highfield Level 3 Diploma in Customer Service
- hold or be working towards a recognised internal quality assurance qualification, which could include any of the following:
  - Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice

  - Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
  - D34 or V1 verifier awards
- maintain appropriate continued professional development for the subject area

Reasonable adjustments and special considerations

Highfield Qualifications has measures in place for learners who require additional support. Please refer to Highfield Qualifications' Reasonable Adjustments Policy for further information/guidance.

ID requirements

It is the responsibility of the centre to have systems in place to ensure that the person taking an assessment is indeed the person they are claiming to be. All centres are therefore required to ensure that each learner's identification is checked before they undertake the assessment. Highfield Qualifications recommends the following as proof of a learner's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, e.g. employee ID card, student ID card or travel card

If a learner is unable to produce any of the forms of photographic identification listed above, a centre may accept another form of identification containing a signature, for example, a credit card. Identification by a third-party representative, such as a line manager, human resources manager or invigilator, will also be accepted.

For more information on learner ID requirements, please refer to Highfield Qualifications' Core Manual.

Progression opportunities

On successful completion of this qualification, learners may wish to continue their development by undertaking one of the following qualifications:

- Highfield Level 3 End-Point Assessment for Customer Service Specialists apprenticeship standard
- Highfield Level 3 Certificate in Customer Service
- Highfield Level 3 Diploma in Customer Service
- Highfield Level 3 End-Point Assessment for Team Leader Supervisors apprenticeship standard

Useful websites

- https://www.gov.uk/government/collections/apprenticeship-standards

Additional support/training

The National Counter Terrorism Security Office (NaCTSO) is a police unit that works alongside the Home Office to support the 'protect and prepare' areas of the government's counterterrorism strategy. One of their aims is to encourage the public to recognise and report suspicious activity

and behaviour. You can find information, advice and guidance on recognising, acting on and reporting suspicious behaviour on the following website:

- https://www.gov.uk/government/organisations/national-counter-terrorism-security-office

As an apprentice you can access the free NaCTSO Action Counters Terrorism (ACT) Awareness e-learning course. This award-winning and invaluable training tool will help you to understand your role in recognising and reporting suspected terrorism and what to do in the event of a terrorist attack.

To access the course:

- follow the link: http://ct.highfieldelearning.com/org/TheHighfieldGroup
- answer the questions
- click start

Appendix 1: Qualification structure

To complete the **Highfield Level 3 Diploma for Customer Service Skills (RQF),** learners must complete **all units** contained within the mandatory group

Mandatory group
Learners must achieve **all units** in this group

Unit reference	Unit title	Level	GLH	Credit
D/617/6454	Business Knowledge and Understanding	3	20	4
H/617/6455	Customer Journey Knowledge	3	30	5
K/617/6456	Knowing your customers and their needs/Customer Insight	3	30	5
M/617/6457	Customer service culture and environment awareness	3	30	5
T/617/6458	Business focused service delivery	3	15	2
A/617/6459	Providing a positive customer experience	3	50	7
M/617/6460	Working with your customers/customer insights	3	10	2
T/617/6461	Customer service performance	3	10	2
A/617/6462	Service Improvement	3	18	3
F/617/6463	Develop self	3	5	1
J/617/6464	Ownership/Responsibility	3	12	2
L/617/6465	Team Working	3	10	2
R/617/6466	Equality	3	5	1
Y/617/6467	Personal Presentation	3	5	1

Appendix 2: Qualification content

Unit 1: Business knowledge and understanding		
Unit Ref: D/617/6454	**GLH: 20**	**Credit: 4**

Learning Outcomes	Assessment Criteria
K1 Understand your organisation's current business strategy in relation to customers and make recommendation for its future. Understand what continuous improvement means in a service environment and how your recommendations for change impact your organisation. Understand the principles and benefits of being able to think about the future when taking action or making service-related decisions. Understand the impact your service provision has on the wider organisation and the value it adds. Understand a range of leadership styles and apply them successfully in a customer service environment	K1.1 Explain the impact of the organisation's **mission statement** and **business strategy** on customer service delivery and make recommendations for future improvements. K1.2 Describe **improvements** to the customer service provision, the steps required to implement this change and the benefit this change could have on the organisation and their role. K1.5 Describe their **role** in meeting their organisation's customer service standards and its impact upon other departments. K1.6 Explain the different types of leadership styles that work best in their customer environment

Amplification and Guidance

- **Mission statement**
  - A mission statement is a short statement of an organisations purpose, identifying the goal of its operations
- **Business Strategy**
  - A summary of how a business plans to achieve its goals and improves and sustains its position in the industry
- **Improvement**
  - An effort to improve products, services and processes that aims to increase quality and efficiency and reduce costs.
- **Role**
  - The function assumed or part played by a person or thing in a situation.
- **Leadership Styles**

- A leadership style is a leader's style of providing direction, implementing plans, and motivating people. Examples of this may include: Transformational, Transactional, Servant, Autocratic, Democratic and Bureaucratic

- **Future-focused approach**
  - Completed through a SWOT or PESTLE analysis to identify factors that might influence future customer service strategy or activities

Unit 2: Customer journey knowledge		
Unit Ref: H/617/6455	**GLH: 30**	**Credit: 5**

Learning Outcomes	Assessment Criteria
K2 Understand and critically evaluate the possible journeys of your customers, including challenges and the end-to-end experience Understand the underpinning business processes that support you in bringing about the best outcome for customers and your organisation Understand the reasons why customer issues and complex situations sometimes need referral or escalation for specialist attention Understand commercial factors and authority limits for delivering the required customer experience	K2.1 Describe customer journeys within their organisation and explain how these are managed to ensure successful outcomes K2.2 Explain the **underpinning business processes** that support them on bringing about the best outcome for customer and their organisation K2.3 Explain why customer issues and complex situations sometimes need referral or escalation for **specialist attention** within their organisation K2.4 Explain how to adhere to their organisation's service level agreement and explain the **limit of their authority** when providing customer service

Amplification and Guidance

- **Limit of their authority**
  - The decisions that certain staff members can make in a business. This includes exchanges and refunds. In certain situations, a staff member must confer with a higher level of authority, before taking a decision.
- **Specialist attention**
  - These are contractual obligations or SLA's that ensure customer requests for service are met. This may also be what the customer requires if an issue cannot be resolved at the first line of customer service.
- **Underpinning business processes**
  - Complaint handling policy/procedure, customer management systems, feedback processes, incentives and penalties

Unit 3: Knowing your customers and their needs/customer insight		
Unit Ref: K/617/6456	**GLH: 30**	**Credit: 5**

Learning Outcomes	Assessment Criteria
K3 Know your internal and external customers and how their behavior may require different approaches from you Understand what drives loyalty, retention and satisfaction and how they impact on your organisation How to analyse, use and present a range of information to provide customer insight Understand different customer types and the role of emotions in bringing about a successful outcome Understand how customer expectations can differ between cultures, ages and social profiles	K3.1 Describe how their internal and external customer's expectations can differ and explain how they would adapt their approach to meet those expectations K3.2 Evaluate the factors used to drive and improve loyalty, retention and satisfaction of customers and the impact they have on the organisation K3.3 Explain how they analyse, use and present a range of information in order to provide customer insight K3.4 Assess at least 3 different **customer types** and their role of emotions in order to achieve a successful outcome for them K3.5 Explain how customer expectations can differ between cultures, ages and social profiles

Amplification and Guidance

- **Customer types**
  - Internal, external, business/corporate, domestic, vulnerable

Unit 4: Customer service culture and environment awareness		
Unit Ref: M/617/6457	**GLH: 30**	**Credit: 5**

Learning Outcomes	Assessment Criteria
K4 Keep current, knowledge, and understanding of regulatory considerations, drivers and impacts in relation to how you deliver for customers Understand your business environment and culture and the position of customer service within it Understand your organisation structure and what role each department needs to play in delivering customer service and what the consequences are should things go wrong Understand how to find and use industry best practice to enhance your own knowledge	K4.1 Outline where different sources of information on industry best practice can be found and explain how they can be used to improve personal and professional development K4.2 Explain current legislation, compliance and regulatory guidance and their impact on customer service delivery K4.3 Discuss the internal and external factors influencing their business environment and culture K4.4 Explain the departmental roles/functions within their organisational structure and their influence in customer service delivery K4.5 Explain the importance of effective communication among departments in providing good customer service K4.6 State potential causes of service failure and the consequences of these

Unit 5: Business focused service delivery		
Unit Ref: T/617/6458	**GLH: 15**	**Credit: 2**

Learning Outcomes		Assessment Criteria	
S1	Demonstrate a continuous improvement and future focused approach to customer service delivery including decision making and providing recommendations or advice Resolve complex issues by being able to choose from and successfully apply a wide range of approaches Find solutions that meet your organisations needs as well as the customer requirements	S1.1	Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout
		S1.2	Assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements
		S1.4	Evidences when they made decisions and recommendations to improve their own customer service delivery

Unit 6: Providing a positive customer experience

Unit Ref: A/617/6459	GLH: 50	Credit: 7

Learning Outcomes	Assessment Criteria
S2 Through advanced questioning, listening and summarising negotiate mutually beneficial outcomes Manage challenging and complicated situations within your level of authority and make recommendations to enable and deliver change to service and strategy Use clear explanations, provide options and solutions to influence and help customers make choices and agree next steps Explore and interpret the customer experience to inform and influence achieving a positive result for customer satisfaction Demonstrate a cost-conscious mind-set when meeting customer and business needs Identify where highs and lows of the customer journey produce a range of emotions in the customer Use written and verbal communication to simplify and provide complex information in a way that supports positive customer outcome in the relevant format	S2.1 Demonstrates when they have balanced the meeting of their customer and their organisations needs while showing they have considered cost implications S2.3 Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes S2.4 Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction S2.5 Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational policy and procedures S2.6 Recognises when customer emotions have been affected by the level of service offered S2.7 Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes S2.9 Provides evidence to show how they identify information which can be used by their organisation to provide customer insight and identify how this information can be analysed, used and presented S2.10 Demonstrates how they communicate with customers, gaining full information on their experience, and recommend improvements to customer service delivery to others

Amplification and Guidance

- **Identify trends/recurring issues**
  - Customer satisfaction surveys, complaint resolution and escalation analysis, customer feedback, market indicators
  - Knowledge of a range of questioning techniques, active listening, note taking

Unit 7: Working with your customers/customer insights		
Unit Ref: M/617/6460	**GLH: 10**	**Credit: 2**

Learning Outcomes		Assessment Criteria	
S3	Proactively gather customer feedback, through a variety of methods. Critically analyse, and evaluate the meaning, implications and facts and act upon it Analyse your customer types, to identify or anticipate their potential needs and expectations when providing your service	S3.1 S3.2	Evidences how they proactively seek and gather customer feedback through a variety of methods and evaluate this feedback to make recommendations on possible improvements Gather and analyse information about the types of customers their organisation has and explain how the service they provide meets their potential needs and expectations

Unit 8: Customer service performance		
Unit Ref: T/617/6461	**GLH: 10**	**Credit: 2**

Learning Outcomes		Assessment Criteria	
S4	Maintain a positive relationship even when you are unable to deliver the customers expected outcome When managing referrals or escalations take into account historical interactions and challenges to determine next steps	S4.1 S4.2	Evidence when they have maintained a positive relationship even when they are unable to deliver the customers expected outcome Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations

Unit 9: Service improvement		
Unit Ref: A/617/6462	**GLH: 18**	**Credit: 3**

Learning Outcomes	Assessment Criteria
S5 Analyse the end to end service experience, seeking input from others where required supporting development of solutions Make recommendations based on your findings to enable improvement Make recommendations and implement where possible, changes in line with new and relevant legislation, regulations and industry best practice	S5.1 Evidence how they use the **qualitative and quantitative customer experience data** that their organisation gathers S5.2 Evidence the way in which they analyse this data to recommend continuous improvement, showing when there is input from others where required S5.3 Demonstrates how they take into consideration current legislation, compliance and regulatory guidance when making recommendations for change

Amplification and Guidance

- **Qualitative and quantitative customer experience data**
  - Contract lifecycle, value, invoice and payment terms, contract time and resolution rates, number and types of plaudits and complaints
  - Examples of collating and using information to aid decision making, actions taken and results
  - Recognises areas where improvements can be made and provides options or recommendations of how improvements can be implemented
  - Knowledge of relevant legislation, regulatory guidance and its impact on decision making

Unit 10: Develop self		
Unit Ref: F/617/6463	**GLH: 5**	**Credit: 1**

Learning Outcomes	Assessment Criteria
B1 Proactively keep your service, industry and best practice knowledge and skills up-to-date Consider personal goals related to service and take action towards achieving them	B1.1 Provides evidence to demonstrate how they have achieved **learning and development goals**, identified in an agreed personal development plan, in relation to their knowledge and skills of customer service, in the industry and best practice

Amplification and Guidance

- **Learning and development goals**
  - Reaching performance standards and acquiring new knowledge or skills
  - E-learning, workbooks, training, coaching or mentoring
  - Explanation of SMART objectives and at least one example where they have been applied in personal development plan

Unit 11: Ownership/Responsibility		
Unit Ref: J/617/6464	**GLH: 12**	**Credit: 2**

Learning Outcomes	Assessment Criteria
B2 Personally, commit to and take ownership for actions to resolve customer issues to the satisfaction of the customer and your organisation Exercises proactivity and creativity when identifying solutions to customer and organisational issues Make realistic promises and deliver on them	B2.1 Demonstrates responsibility and ownership in resolving customer issues, by getting the right people involved and delivering on promises, to the satisfaction of the customer and their organisation. B2.2 Evidences how they recognise when customer expectations are not met and demonstrates how, using **appropriate communication techniques**, this could be managed to maintain a positive relationship B2.3 Shows proactivity and creativity when identifying solutions to customer and organisational issues

Amplification and Guidance

- **Appropriate communication techniques**
  - Range of communication methods verbal & non-verbal – telephone, email, social media, letters
  - Use of effective communication in reducing conflict – remaining calm/demonstrating empathy

Unit 12: Team working		
Unit Ref: L/617/6465	**GLH: 10**	**Credit: 2**

Learning Outcomes		Assessment Criteria	
B3	Work effectively and collaboratively with colleagues at all levels to achieve results Recognise colleagues as internal customers Share knowledge and experience with others to support colleague development	B3.1 B3.2 B3.3	Demonstrate sharing own knowledge and experience with others, to support colleague development Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels. Shows adaptability of own skills when working with internal customers.

Unit 13: Equality		
Unit Ref: R/617/6466	**GLH: 5**	**Credit: 1**

Learning Outcomes	Assessment Criteria
B4 Adopt a positive and enthusiastic attitude being open minded and able to tailor your service to each customer Be adaptable and flexible to your customer needs whilst continuing to work within the agreed customer service environment	B4.1 Demonstrate appropriate reactions to customer emotions and bring about a successful outcome for different customer types B4.2 Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting **equality, diversity and inclusion** in their customer service delivery

Amplification and Guidance

- **Equality, diversity and inclusion**
  - Protected 9 characteristics: Age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation
  - Inclusive customer service for diverse groups of customers – policies/facilities such as access to information in different languages, large print on documents, hearing loops

Unit 14: Personal presentation		
Unit Ref: Y/617/6467	**GLH: 5**	**Credit: 1**

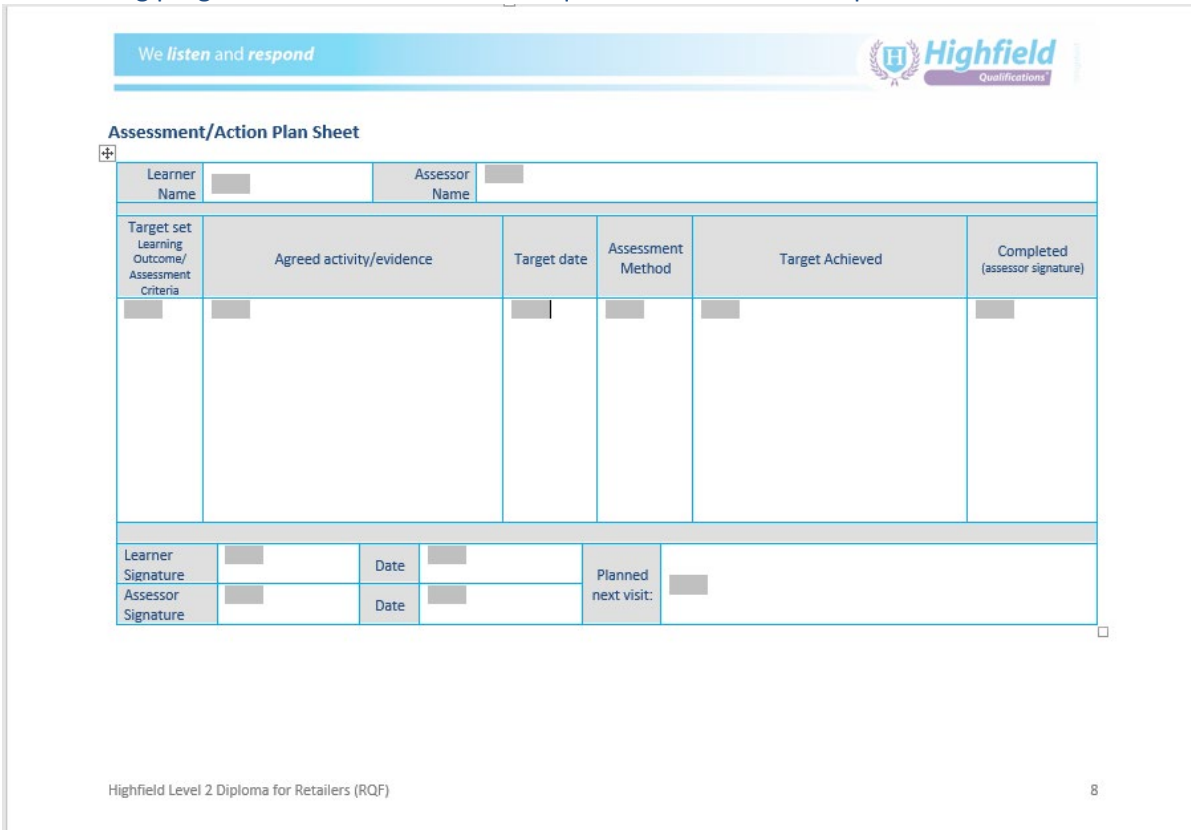
Learning Outcomes	Assessment Criteria
B5 Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction Ensure your personal presentation, in all forms of communications, reflects positively on your organisations brand	B5.1 Demonstrate **brand advocacy**, values and belief when dealing with customer requests to build trust, credibility and satisfaction B5.2 Evidence to show how their personal presentation made a positive impact on their organisations brand

Amplification and Guidance

- **Brand advocacy**
  - Organisations culture, values and beliefs

Appendix 3: Sample Assessment Material

The following pages include sample paperwork which can be used for setting and recording actions and tracking progress and can be found in the qualification assessment pack



We *listen* and *respond*

Assessment/Action Plan Sheet

Learner Name		Assessor Name	

Target set Learning Outcome/ Assessment Criteria	Agreed activity/evidence	Target date	Assessment Method	Target Achieved	Completed (assessor signature)

Learner Signature		Date		Planned next visit:	
Assessor Signature		Date			

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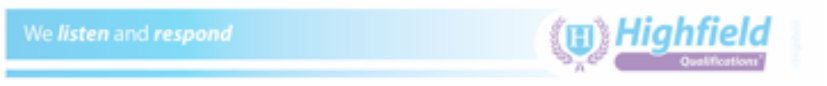


Assessment Record Sheet

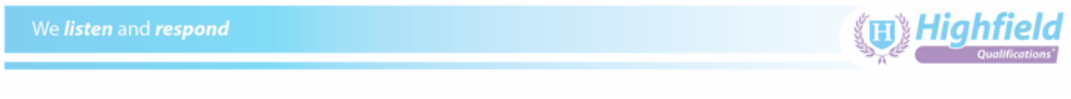
Learner		Assessor	
Date		Location	
Assessment Method			

EV Ref	Details of the type of evidence and assessment criteria covered

Assessor Signature:

Learner/Witness Signature:

Assessment method key:					
Obs	Observation	Sim	Simulation/assignment	O	Other
Pe	Product evidence	Wt	Witness testimony	PD	Professional Discussion
Q	Questioning	R	RPL		



Evidence Tracking Sheet

Mandatory Units

Learner Name	
Centre Name	

Mandatory Unit 1: Understanding and communicating with customers in a retail environment (H/615/6223)				
Assessment Criteria				
Learning Outcome	Assessment Criteria	Evidence Type	Evidence Reference	Date
1. Understand different types of customer and their purchasing habits	1.1 Identify different types of customers to the business			
	1.2 Describe what a customer purchasing habit is			
	1.3 Explain how knowing your customer purchasing habits can help to increase sales			
2. Understand how to use different methods of communication and increase sales	2.1 Describe different methods of communicating with customers			
	2.2 Describe how to determine an individual's situation and needs			
	2.3 Describe how to support and increase sales			
	2.4 Explain how to encourage customer loyalty and how this increases sales			
3. Understand the importance of feedback	3.1 Identify how customer feedback can be obtained			