

## Qualification Specification

**601/3689/3**

iCQ Level 2 Diploma in Customer Service (RQF)



### Qualification Details

Title	: iCQ Level 2 Diploma in Customer Service (RQF)
Awarding Organisation	: <a href="#">iCan Qualifications Limited</a>
Fees Price List Url	: <a href="https://icanqualify.net">https://icanqualify.net</a>
Qualification Type	: RQF
Qualification Sub Type	: None
Qualification Level	: Level 2
Qualification Sub Level	: None
EQF Level	: Level 3
Regulation Start Date	: 20-Jun-2014
Operational Start Date	: 01-Sep-2014
Offered In England	: Yes
Offered In Wales	: Yes
Offered In Northern Ireland	: Yes
Assessment Language In English	: Yes
Assessment Language In Welsh	: No
Assessment Language In Irish	: No
SSA	: 15.2 Administration
Purpose	: D. Confirm occupational competence and/or 'licence to practice'
Sub Purpose	: D1. Confirm competence in an occupational role to the standards required
Total Credits	: 45
Min Credits at/above Level	: 45
Minimum Guided Learning Hours	: 245
Maximum Guided Learning Hours	: 305
Diploma Guided Learning Hours	: 0
Barring Classification Code	: ZZZZ
Overall Grading Type	: Pass
Assessment Methods	: Portfolio of Evidence
Structure Requirements	: To achieve this qualification, learners 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.
Age Ranges	: Pre-16 : Yes; 16-18 : Yes; 18+ : No; 19+ : Yes
Qualification Objective	: This qualification will enable those who work in a customer service environment develop their knowledge, understanding and skills

# Qualification Specification

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## Rules of Combination (ROC)

Group Name	Mandatory	#Units	Minimum Units	Maximum Units	Minimum Credits	Maximum Credits
<b>CMG) Compound</b>	<b>Yes</b>	0	3	4	45	0
A) Mandatory Group A	<b>Yes</b>	5	5	5	19	19
B) Optional Group B	<b>Yes</b>	2	1	0	3	0
C) Optional Group C	<b>Yes</b>	17	4	0	16	0
D) Optional Group D	No	15	1	0	0	7

### Group A Mandatory Group A

URN	Title	Level	GLH	Credit
<a href="#">A/506/1964</a>	Understand employer organisations	2	40	4
<a href="#">A/506/2130</a>	Deliver customer service	2	27	5
<a href="#">F/506/2131</a>	Understand customers	2	17	2
<a href="#">J/506/2132</a>	Principles of customer service	2	34	4
<a href="#">L/506/1788</a>	Manage personal performance and development	2	18	4

### Group B Optional Group B

URN	Title	Level	GLH	Credit
<a href="#">D/506/2119</a>	Communicate verbally with customers	2	14	3
<a href="#">T/506/2126</a>	Communicate with customers in writing	2	20	3

### Group C Optional Group C

URN	Title	Level	GLH	Credit
<a href="#">A/506/2158</a>	Resolve customer service problems	2	22	5
<a href="#">A/506/2161</a>	Support customers through real-time online customer service	2	15	3
<a href="#">D/506/2170</a>	Gather, analyse and interpret customer feedback	3	24	5
<a href="#">F/506/2159</a>	Deliver customer service to challenging customers	2	16	3
<a href="#">H/506/2154</a>	Deal with incoming telephone calls from customers	2	16	3
<a href="#">H/506/2977</a>	Support customers using self-service equipment	2	18	3
<a href="#">J/506/2163</a>	Use social media to deliver customer service	2	18	3
<a href="#">K/506/2155</a>	Make telephone calls to customers	2	16	3
<a href="#">K/506/2978</a>	Provide post-transaction customer service	2	22	5
<a href="#">L/506/2133</a>	Promote additional products and/or services to customers	2	14	2
<a href="#">R/506/2134</a>	Process information about customers	2	14	3
<a href="#">R/506/2151</a>	Resolve customers complaints	3	22	4
<a href="#">T/506/2143</a>	Deliver customer service whilst working on customers premises	2	20	4
<a href="#">T/506/2157</a>	Carry out customer service handovers	2	15	3
<a href="#">T/506/2160</a>	Support customer service improvements	2	12	3
<a href="#">Y/506/2135</a>	Exceed customer expectations	2	15	3
<a href="#">Y/506/2149</a>	Develop customer relationships	2	18	3

### Group D Optional Group D

URN	Title	Level	GLH	Credit
<a href="#">F/502/4396</a>	Bespoke Software	2	20	3
<a href="#">H/506/1814</a>	Provide reception services	2	15	3
<a href="#">H/506/1912</a>	Negotiate in a business environment	3	18	4
<a href="#">J/506/1806</a>	Principles of equality and diversity in the workplace	2	10	2
<a href="#">K/503/0421</a>	Deal with incidents through a contact centre	2	40	7
<a href="#">L/503/0394</a>	Carry out direct sales activities in a contact centre	2	15	5
<a href="#">L/506/1807</a>	Manage diary systems	2	12	2
<a href="#">L/506/1869</a>	Contribute to the organisation of an event	2	23	3
<a href="#">L/506/1905</a>	Employee rights and responsibilities	2	16	2
<a href="#">M/502/8587</a>	Processing sales orders	2	17	2
<a href="#">M/502/8606</a>	Handling objections and closing sales	2	22	3
<a href="#">M/506/1895</a>	Buddy a colleague to develop their skills	2	19	3
<a href="#">R/502/8601</a>	Meeting customers after sales needs	2	14	3
<a href="#">R/506/1789</a>	Develop working relationships with colleagues	2	19	3
<a href="#">T/505/4673</a>	Health and Safety Procedures in the Workplace	2	16	2

Qualification Framework	: RQF
Title	: Understand employer organisations
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 40
Unit Credit Value	: 4
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: A/506/1964 : Understand employer organisations**

**Understand organisational structures**

**Assessment Criterion - The learner can:**

01.01	Explain the differences between the private sector, public sector and voluntary sector
01.02	Explain the functions of different organisational structures
01.03	Describe the features of different types of legal structures for organisations

**Understand the organisational environment**

02.01	Describe the internal and external influences on organisations
02.02	Explain the use of different models of analysis in understanding the organisational environment
02.03	Explain why change in the business environment is important

Qualification Framework	: RQF
Title	: Deliver customer service
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 27
Unit Credit Value	: 5
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: A/506/2130 : Deliver customer service**

**Understand customer service delivery**

**Assessment Criterion - The learner can:**

01.01	Explain the relationship between customers needs and expectations and customer satisfaction
01.02	Describe the features and benefits of an organisations products and/or services
01.03	Explain the importance of treating customers as individuals
01.04	Explain the importance of balancing promises made to customers with the needs of an organisation
01.05	Explain when and to whom to escalate problems
01.06	Describe methods of measuring their own effectiveness in the delivery of customer service
<b>Understand the relationship between customer service and a brand</b>	
02.01	Explain the importance of a brand to an organisation
02.02	Explain how a brand affects an organisations customer service offer
02.03	Explain the importance of using customer service language that supports a brand promise
02.04	Identify their own role in ensuring that a brand promise is delivered
<b>Be able to prepare to deal with customers</b>	
03.01	Keep up to date with an organisations products and/or services
03.02	Prepare resources that are necessary to deal with customers before starting work
<b>Be able to provide customer service</b>	
04.01	Maintain organisational standards of presentation and behaviour when providing customer service
04.02	Adapt their own behaviour to meet customers needs or expectations
04.03	Respond to customers requests in line with organisational guidelines
04.04	Inform customers of the progress of their requests
04.05	Confirm that customers expectations have been met in line with the service offer
04.06	Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
<b>Be able to support improvements to customer service delivery</b>	
05.01	Identify ways that customer service could be improved for an organisation and individuals
05.02	Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Qualification Framework	: RQF
Title	: Understand customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 17
Unit Credit Value	: 2
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: F/506/2131 : Understand customers**

**Understand different types of customers**

**Assessment Criterion - The learner can:**

01.01	Explain the distinctions between internal and external customers
01.02	Explain how cultural factors can affect customers expectations
01.03	Describe the characteristics of challenging customers
01.04	Explain how to identify dissatisfied customers

**Understand the value of customers and their loyalty**

02.01	Explain how the achievement of the customer service offer contributes to enhancing customer loyalty
02.02	Explain the relationship between customer satisfaction and organisational performance
02.03	Explain how the reputation and image of an organisation affects customers perceptions of its products and/or services
02.04	Explain the potential consequences of customers dissatisfaction
02.05	Describe different methods of attracting customers and retaining their loyalty

Qualification Framework	: RQF
Title	: Principles of customer service
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 34
Unit Credit Value	: 4
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: J/506/2132 : Principles of customer service**

Understand customer service	
<b>Assessment Criterion - The learner can:</b>	
01.01	Explain the purpose and scope of customer service
01.02	Define the term service offer
01.03	Explain the value of a service offer to an organisation
01.04	Explain the importance of delivering consistently high quality customer service
01.05	Explain the importance of keeping up to date with knowledge of competitors activities
01.06	Explain barriers to providing effective customer service
01.07	Describe the features of effective follow-up service
<b>Understand how legal and ethical requirements relate to customer service</b>	
02.01	Describe how sales and consumer-related legislation and regulations affect the delivery of customer service
02.02	Describe how health, safety and environmental legislation affects customer service delivery
02.03	Explain how ethical considerations affect customer service
02.04	Explain how equality legislation affects customer service
02.05	Describe how legislation affects the use and storage of customer information
<b>Understand how to deliver effective customer service</b>	
03.01	Explain the difference between customers wants, needs and their expectations
03.02	Explain how to identify customers needs and expectations
03.03	Explain the importance of managing customers expectations
03.04	Explain how to behave in a way that meets customers expectations
03.05	Describe techniques that can be used to put customers at ease and gain their trust
03.06	Explain the importance of following up actions and keeping promises when delivering customer service
<b>Understand the management of customer service information</b>	
04.01	Explain how customer service information can be used
04.02	Explain the importance of systems to manage customer service information
04.03	Explain the uses of systems to manage customer service information
04.04	Identify the features of an effective customer complaints process
04.05	Describe the uses of a customer complaints process

Qualification Framework	: RQF
Title	: Manage personal performance and development
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 18
Unit Credit Value	: 4
SSAs	: 15.3 Business Management
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/506/1788 : Manage personal performance and development**

**Be able to manage personal performance**

**Assessment Criterion - The learner can:**

01.01	Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
01.02	Agree criteria for measuring progress and achievement with line manager
01.03	Complete tasks to agreed timescales and quality standards
01.04	Report problems beyond their own level of competence and authority to the appropriate person
01.05	Take action needed to resolve any problems with personal performance

**Be able to manage their own time and workload**

02.01	Plan and manage workloads and priorities using time management tools and techniques
02.02	Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
02.03	Explain the benefits of achieving an acceptable work-life balance

**Be able to identify their own development needs**

03.01	Identify organisational policies relating to personal development
03.02	Explain the need to maintain a positive attitude to feedback on performance
03.03	Explain the potential business benefits of personal development
03.04	Identify their own preferred learning style(s)
03.05	Identify their own development needs from analyses of the role, personal and team objectives
03.06	Use feedback from others to identify their own development needs
03.07	Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

**Be able to fulfil a personal development plan**

04.01	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
04.02	Make use of formal development opportunities that are consistent with business needs
04.03	Use informal learning opportunities that contribute to the achievement of personal development objectives
04.04	Review progress against agreed objectives and amend plans accordingly
04.05	Share lessons learned with others using agreed communication methods

Qualification Framework	: RQF
Title	: Communicate verbally with customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 14
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: D/506/2119 : Communicate verbally with customers**

**Understand how to communicate verbally with customers**

**Assessment Criterion - The learner can:**

01.01	Explain the importance of effective communication in customer service
01.02	Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
01.03	Explain why customer service language is used
01.04	Describe different questioning techniques that can be used when communicating with customers
01.05	Describe verbal and non-verbal signals that show how a customer may be feeling
01.06	Describe the types of information needed when communicating verbally with customers

**Be able to use customer service language to communicate with customers**

02.01	Identify customers wants and priorities
02.02	Listen actively to what customers are saying
02.03	Communicate clearly, concisely and professionally with customers
02.04	Use a tone of voice and expression that reinforces messages when communicating with customers
02.05	Use language that reinforces empathy with customers
02.06	Adapt their response in accordance with customers changing behaviour
02.07	Provide information and advice that meets customers needs
02.08	Maintain organisational standards of behaviour and communication when interacting with customers
02.09	Check that customers have understood what has been communicated
02.10	Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

Qualification Framework	: RQF
Title	: Communicate with customers in writing
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 20
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: T/506/2126 : Communicate with customers in writing**

**Understand how to communicate with customers in writing**

**Assessment Criterion - The learner can:**

01.01	Explain why it is necessary to use different forms of written communication for different purposes
01.02	Describe practices for producing different forms of written communications
01.03	Describe the potential benefits and limitations associated with communicating with customers in writing
01.04	Explain the implications of confidentiality and data protection in communicating with customers in writing

**Be able to plan written communications to customers**

02.01	Identify the objective(s) of the communication
02.02	Gather the information needed to draft the communication
02.03	Select the form of written communication that is most likely to lead to customer satisfaction within the service offer

**Be able to communicate with customers in writing**

03.01	Produce communications that recognise customers points of view in accordance with organisational standards, styles and tone
03.02	Use language that is clear and concise, adapting it to meet identified customer needs
03.03	Record decisions and actions taken and the reasons for them
03.04	Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

Qualification Framework	: RQF
Title	: Resolve customer service problems
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 22
Unit Credit Value	: 5
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: A/506/2158 : Resolve customer service problems**

Understand the resolution of customer service problems	
<b>Assessment Criterion - The learner can:</b>	
01.01	Describe an organisations customer service and complaints procedures
01.02	Describe techniques to identify customer service problems and their causes
01.03	Describe techniques to deal with situations where customers become agitated or angry
01.04	Explain the limits of their own authority for resolving customers problems and making promises
01.05	Explain the purpose of encouraging customers to provide feedback
01.06	Describe methods used to encourage customers to provide feedback
<b>Be able to resolve customer service problems</b>	
02.01	Identify the nature and cause of customer service problems
02.02	Identify workable options for resolving problems within organisational guidelines
02.03	Use the most appropriate method of communication for dealing with customers
02.04	Agree with customers the option that best meets their needs and those of the organisation
02.05	Keep customers informed of progress
02.06	Fulfill promises made to customers during the resolution process
02.07	Share customer feedback with others to improve the resolution of customer service problems
02.08	Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
<b>Be able to manage unresolved customer service problems</b>	
03.01	Explain to customers the reasons why problems cannot be resolved
03.02	Refer customers to other sources of help if their problems cannot be resolved

Qualification Framework	: RQF
Title	: Support customers through real-time online customer service
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 15
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: A/506/2161 : Support customers through real-time online customer service**

**Understand how to support customers through real-time online customer service**

**Assessment Criterion - The learner can:**

01.01	Explain how an organisations online customer service system works
01.02	Explain how to navigate their own customer service site
01.03	Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services
01.04	Explain how to adapt their own communication style to meet customers ability to use online systems

**Be able to establish the customer service support needed by customers**

02.01	Identify customers familiarity with the site
02.02	Identify the difficulties faced by customers when navigating websites
02.03	Identify the support for customers that will meet their needs

**Be able to support online customer service in real-time**

03.01	Step through screen sequences while the customer operates the system
03.02	Communicate with customers in terms they can understand
03.03	Inform customers of what is happening and why certain steps are required
03.04	Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Qualification Framework	: RQF
Title	: Gather, analyse and interpret customer feedback
Unit Level	: Level 3
Unit Sub Level	: None
Guided Learning Hours	: 24
Unit Credit Value	: 5
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: D/506/2170 : Gather, analyse and interpret customer feedback**

**Understand how to gather, analyse and interpret customer feedback**

**Assessment Criterion - The learner can:**

01.01	Describe methods of collecting data for customer research
01.02	Explain random sampling techniques used to collect data
01.03	Explain how to evaluate bias in non-random samples
01.04	Explain the principles of questionnaire design
01.05	Assess the suitability of a range of techniques to analyse customer feedback
01.06	Explain techniques used to monitor the quality of data collected
01.07	Explain the use of software to record and analyse customer feedback
01.08	Explain the validation issues associated with customer feedback
01.09	Explain the importance of anonymising comments from customers who do not wish to be identified
<b>Be able to plan the collection of customer feedback on customer service issues</b>	
02.01	Identify the objectives of collecting customer feedback
02.02	Justify the reasons for selecting different data collection methods
02.03	Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
<b>Be able to gather customer feedback</b>	
03.01	Collect customer feedback using the sampling frame identified in a customer service plan
03.02	Record data in a way that makes analysis straightforward
03.03	Verify that all data is handled in line with legal, organisational and ethical policies and procedures
<b>Be able to analyse and interpret customer feedback to recommend improvements</b>	
04.01	Use data analysis methods to identify patterns and trends in customer feedback
04.02	Use the findings of a data analysis to identify areas for improvement to customer service
04.03	Present the findings of an analysis in the agreed format
04.04	Recommend improvements in response to the findings of an analysis

Qualification Framework	: RQF
Title	: Deliver customer service to challenging customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 16
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: F/506/2159 : Deliver customer service to challenging customers**

**Understand the delivery of customer service to challenging customers**

**Assessment Criterion - The learner can:**

01.01	Describe different types of challenging customers in the customer service environment
01.02	Explain an organisations procedures and standards of behaviour for dealing with challenging customers
01.03	Explain behaviours that make it challenging to deal with customers
01.04	Explain the difference between assertive and aggressive behaviour
01.05	Describe techniques to deal with customers challenging behaviour
01.06	Explain their own levels of authority for agreeing actions outside the service offer
01.07	Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters

**Be able to deal with challenging customers**

02.01	Identify the signs that indicate that a customer is challenging
02.02	Express understanding of customers point of view without admitting liability
02.03	Explain to customers the limits of the service they can offer
02.04	Explain to customers the reasons for an organisations position and policy
02.05	Agree a way forward that balances customer satisfaction and organisational needs
02.06	Obtain help from colleagues when options for action are beyond their level of authority
02.07	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Qualification Framework	: RQF
Title	: Deal with incoming telephone calls from customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 16
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: H/506/2154 : Deal with incoming telephone calls from customers**

**Understand how to deal with incoming customer calls**

**Assessment Criterion - The learner can:**

01.01	Explain why an organisation should have guidance on dealing with telephone calls
01.02	Explain why an organisation should have an identity checking process
01.03	Explain the importance of keeping customer information up to date
01.04	Explain the importance of keeping customers informed of the progress of their call
01.05	Describe how body language and facial expressions can be detected over the telephone
01.06	Describe different questioning techniques used when dealing with incoming calls
01.07	Explain how to handle abusive calls
<b>Be able to establish the purpose of incoming customer calls</b>	
02.01	Verify the identity of callers in line with organisational guidelines
02.02	Speak clearly, concisely and politely using speech and tone to create a rapport
02.03	Adapt their own communication style to meet customers needs
02.04	Listen actively to what customers are saying to collect as much information as possible
02.05	Use questioning techniques that are appropriate to the conversation
02.06	Record information in line with organisational guidelines
<b>Be able to deal with customer questions and requests</b>	
03.01	Respond in a way that best meets customer and organisational requirements
03.02	Give clear and concise information that meets customers needs
03.03	Manage the length of the conversation
03.04	Confirm that the customer is satisfied with the outcomes of the conversation
03.05	Complete agreed post-call follow up actions

Qualification Framework	: RQF
Title	: Support customers using self-service equipment
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 18
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: H/506/2977 : Support customers using self-service equipment**

**Understand how to support customers using self-service equipment**

**Assessment Criterion - The learner can:**

01.01	Explain how the self-service equipment works
01.02	Describe problems that are commonly encountered by customers when using self-service equipment
01.03	Explain demonstration techniques to use when supporting customers using self-service equipment
01.04	Explain organisational procedures for the use of equipment and fault reporting
<b>Be able to identify the help needed by customers using self-service equipment</b>	
02.01	Identify signs that show when a customer is having difficulty with the self-service equipment
02.02	Identify a style and level of intervention that meets customers needs
<b>Be able to help customers to use self-service equipment</b>	
03.01	Maintain a professional, polite and approachable manner while monitoring customers use of equipment
03.02	Use staff override functions to enable self-service equipment to be used by customers
03.03	Explain to customers how to use the equipment and complete the transaction
03.04	Report equipment-related errors and issues to the right person

Qualification Framework	: RQF
Title	: Use social media to deliver customer service
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 18
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: J/506/2163 : Use social media to deliver customer service**

**Understand social media in a business environment**

**Assessment Criterion - The learner can:**

01.01	Explain how different social media platforms can be used for customer service
01.02	Describe different audience groups for a range of social media platforms
01.03	Explain the importance of monitoring customer posts in social media networks
01.04	Explain organisational policy and guidelines for the use of social media for customer service purposes
01.05	Explain the etiquette of communication within different social media platforms
01.06	Explain the importance of security settings and how they are used on different social media platforms
01.07	Identify the information that can be shared when colleagues are involved in exchanges using social media
<b>Be able to deal with customers using social media</b>	
02.01	Monitor social media to identify customer questions, requests and comments
02.02	Make responses that are appropriate to posts made by customers on social media networks
02.03	Take action to ensure that customers are satisfied before closing dialogue
02.04	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

Qualification Framework	: RQF
Title	: Make telephone calls to customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 16
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: K/506/2155 : Make telephone calls to customers**

**Understand how to make telephone calls to customers**

**Assessment Criterion - The learner can:**

01.01	Explain the legislation and regulations relating to the use of customer information when planning to make calls
01.02	Explain the importance of keeping customer information up to date
01.03	Explain the reasons for organisational guidance on dealing with telephone calls
01.04	Explain the reasons for organisational identity checking processes
01.05	Explain how body language and facial expressions can be detected over the telephone
01.06	Describe different questioning techniques when dealing with customers
01.07	Explain organisational guidelines for what can and cannot be said or promised
01.08	Explain how to handle abusive calls from customers

**Be able to plan telephone calls to customers**

02.01	Identify the objective(s) of calls
02.02	Prepare the information needed to make calls
02.03	Plan the structure of calls
02.04	Identify customers likely responses and how they can be dealt with

**Be able to make telephone calls to customers**

03.01	Use telecommunications equipment in accordance with organisational standards
03.02	Confirm the identity of customers in line with organisational guidelines
03.03	Make the customer aware of the purpose of the call as early as possible
03.04	Speak clearly, concisely and politely, using speech and tone to create rapport
03.05	Adapt their own communication style to meet customers needs
03.06	Listen actively to what customers are saying to collect as much information as possible
03.07	Give clear and concise information that meets customers needs
03.08	Record information in line with organisational guidelines
03.09	Complete agreed follow up actions after closing the telephone call

Qualification Framework	: RQF
Title	: Provide post-transaction customer service
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 22
Unit Credit Value	: 5
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: K/506/2978 : Provide post-transaction customer service**

**Understand post-transaction customer service**

**Assessment Criterion - The learner can:**

01.01	Explain organisational policies and procedures for post-transaction customer service
01.02	Explain the purposes and range of post-transaction activities
01.03	Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
01.04	Explain how legislation and regulation affect customers rights
01.05	Explain the advantages and disadvantages of post-transaction customer service programmes

**Be able to provide post-transaction customer service**

02.01	Implement a programme of planned post-transaction interventions in line with organisational guidelines
02.02	Use unplanned opportunities post-transaction to provide customer service
02.03	Identify reasons for contacting customers post-transaction
02.04	Confirm customers levels of satisfaction post-transaction
02.05	Make recommendations to decision makers to enhance customer satisfaction
02.06	Present a professional and helpful image

Qualification Framework	: RQF
Title	: Promote additional products and/or services to customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 14
Unit Credit Value	: 2
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/506/2133 : Promote additional products and/or services to customers**

**Understand the promotion of additional products and/or services to customers**

**Assessment Criterion - The learner can:**

01.01	Describe organisational policies and procedures on the promotion of additional products and/or services
01.02	Explain the importance of keeping product/service knowledge up to date
01.03	Explain how to match products and/or services to customer needs
01.04	Describe techniques to promote additional products and/or services

**Be able to promote additional products and/or services to customers**

02.01	Identify opportunities to promote additional products and/or services that are likely to improve the customer experience
02.02	Promote the benefits of additional products and/or services that are likely to be of interest to customers
02.03	Provide information to customers that will help them to decide whether to select additional products and/or services
02.04	Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

Qualification Framework	: RQF
Title	: Process information about customers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 14
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: R/506/2134 : Process information about customers**

**Understand how to process customer information**

**Assessment Criterion - The learner can:**

01.01	Describe the functions of customer information systems
01.02	Explain the way in which legislation and regulatory requirements affect the processing of customer information
01.03	Explain different responsibilities and levels of authority for processing customer service information
01.04	Explain the reliability of sources of customer information
01.05	Explain the validity of customer information

**Be able to process customer information**

02.01	Record information about customers in line with organisational standards and procedures
02.02	Keep customer information up to date
02.03	Respond to requests for customer information from authorised people in a timely manner
02.04	Retrieve customer information that meets the requirements of the request
02.05	Supply customer information in a format appropriate for the recipient
02.06	Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

Qualification Framework	: RQF
Title	: Resolve customers' complaints
Unit Level	: Level 3
Unit Sub Level	: None
Guided Learning Hours	: 22
Unit Credit Value	: 4
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: R/506/2151 : Resolve customers complaints**

**Understand the monitoring and resolution of customers complaints**

**Assessment Criterion - The learner can:**

01.01	Assess the suitability of a range of monitoring techniques for customers complaints
01.02	Explain how to identify those complaints that should prompt a review of the service offer and service delivery
01.03	Explain negotiating techniques used to resolve customers complaints
01.04	Explain conflict management techniques used in dealing with upset customers
01.05	Explain organisational procedures for dealing with customer complaints
01.06	Explain when to escalate customers complaints
01.07	Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
01.08	Explain the advantages and limitations of offering compensation or replacement products and/or services

**Be able to deal with customers complaints**

02.01	Confirm the nature, cause and implications of customers complaints
02.02	Take personal responsibility for dealing with complaints
02.03	Communicate in a way that recognises customers problems and understands their points of view
02.04	Explain the advantages and limitations of different complaint response options to customers
02.05	Explain the advantages and limitations of different complaint response options to the organisation
02.06	Keep customers informed of progress
02.07	Agree solutions with customers that address the complaint and which are within the limits of their own authority
02.08	Record the outcome of the handling of complaints for future reference
02.09	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers complaints

Qualification Framework	: RQF
Title	: Deliver customer service whilst working on customers' premises
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 20
Unit Credit Value	: 4
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: T/506/2143 : Deliver customer service whilst working on customers premises**

**Understand how to deliver customer service whilst working on customers premises**

<b>Assessment Criterion - The learner can:</b>	
01.01	Describe the preparations that need to be made prior to a visit
01.02	Explain the importance of being positive about the product and/or service
01.03	Explain organisational standards of presentation, behaviour and communication
01.04	Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
01.05	Explain how to identify possible risks relating to the work to be carried out
01.06	Explain the way in which legislation affects the work to be carried out
<b>Be able to deliver customer service whilst working on customers premises</b>	
02.01	Identify themselves to customers
02.02	Take action to ensure that customers know when, why and for how long work will be carried out on their premises
02.03	Confirm with customers the nature of work to be carried out on their premises
02.04	Keep customers informed of progress, delays, variations to work to be carried out and follow up needed
02.05	Treat customers, their premises and property with consideration
02.06	Confirm that the customer is satisfied with the outcome
02.07	Maintain their own personal safety and security and that of customers whilst on customers premises

Qualification Framework	: RQF
Title	: Carry out customer service handovers
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 15
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: T/506/2157 : Carry out customer service handovers**

**Understand the customer service handover process**

**Assessment Criterion - The learner can:**

01.01	Explain an organisations customer service handover procedures
01.02	Explain why it is appropriate to pass responsibility for completing particular customer service actions to colleagues
01.03	Explain why, when and how to set reminders to follow up on actions handed over to others
01.04	Explain levels of their own responsibility in the customer service handover process

**Be able to plan customer service handovers**

02.01	Identify the steps in the customer service delivery process that rely on exchanges of information among team members
02.02	Agree with colleagues when to pass customer service issues from one person to another
02.03	Agree methods of information exchange

**Be able to carry out customer service handovers**

03.01	Explain to customers to whom and why a handover is being made
03.02	Exchange information with colleagues in line with organisational procedures
03.03	Check that actions required by others following handovers have been completed
03.04	Identify further actions when the activities required by others have not been completed
03.05	Share feedback with colleagues to make improvements to handover processes

Qualification Framework	: RQF
Title	: Support customer service improvements
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 12
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: T/506/2160 : Support customer service improvements**

**Understand how to support customer service improvements**

**Assessment Criterion - The learner can:**

01.01	Describe different sources of information that may help identify ways of improving customer service
01.02	Describe the constraints on suggesting improvements to customer service
01.03	Explain the limits of their own authority in implementing improvements

**Be able to identify the potential for improvements to customer service**

02.01	Use information from a range of sources to understand the customer experience
02.02	Identify potential areas where customer service could be improved from an analysis of information
02.03	Make recommendations for improvement that are based on evidence from analysed information

**Be able to support the implementation of improvements to customer service**

03.01	Implement agreed improvements within the limits of their own authority
03.02	Inform customers of improvements to customer service
03.03	Identify the impact of improvements to customer service and feedback to relevant people

Qualification Framework	: RQF
Title	: Exceed customer expectations
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 15
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: Y/506/2135 : Exceed customer expectations**

**Understand how to exceed customer expectations**

**Assessment Criterion - The learner can:**

01.01	Explain how customers form expectations of the service they will receive
01.02	Explain legislation, organisational policies and procedures that can limit or vary the service offer
01.03	Explain the types of actions that customers are likely to perceive as adding value
01.04	Explain how to recognise when actions taken to offer added value could be built into the service offer

**Be able to exceed customer expectations**

02.01	Identify differences between customers expectations and needs and the service offer
02.02	Explain the service offer clearly and concisely to customers
02.03	Identify options that offer added value without affecting other customers adversely
02.04	Make offers to customers within their own authority levels
02.05	Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
02.06	Record agreements made and actions taken

Qualification Framework	: RQF
Title	: Develop customer relationships
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 18
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: Y/506/2149 : Develop customer relationships**

**Understand how to develop customer relationships**

**Assessment Criterion - The learner can:**

01.01	Describe the importance of developing relationships with customers
01.02	Explain the value of customer loyalty and retention
01.03	Explain how customers expectations may change over time
01.04	Explain the use of customer feedback as a means of developing customer relationships
01.05	Explain the limits of their own authority to make alternative service offers to customers
01.06	Describe the use of Customer Relationship Management systems and processes to meet customers expectations
01.07	Explain the importance of regular communication in the development of both internal and external customer relationships

**Be able to develop relationships with customers**

02.01	Give help and information that meets or exceeds customers expectations
02.02	Identify new ways of helping customers based on their feedback
02.03	Share feedback from customers with others
02.04	Identify added value that the organisation could offer customers
02.05	Bring to customers attention products or services that may interest them

Qualification Framework	: RQF
Title	: Bespoke Software
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 20
Unit Credit Value	: 3
SSAs	: 6.2 ICT for Users
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: F/502/4396 : Bespoke Software**

**Input and combine information using bespoke applications**

**Assessment Criterion - The learner can:**

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

**Use appropriate structures to organise and retrieve information efficiently**

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

**Use the functions of the software effectively to process and present information**

03.01	Select and use appropriate tools and techniques to edit, process and format information
03.02	Check information meets needs, using IT tools and making corrections as necessary
03.03	Select and use appropriate methods to present information

Qualification Framework	: RQF
Title	: Provide reception services
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 15
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: H/506/1814 : Provide reception services**

**Understand reception services**

**Assessment Criterion - The learner can:**

01.01	Explain the receptionists role in representing an organisation
01.02	Explain an organisations structure and lines of communication
01.03	Describe an organisations standards of presentation
01.04	Explain the health, safety and security implications of visitors to a building
01.05	Explain how to deal with challenging people

**Be able to provide a reception service**

02.01	Welcome visitors in accordance with organisational standards
02.02	Direct visitors to the person they are visiting in accordance with organisational standards
02.03	Record visitors arrivals and departures in accordance with organisational procedures
02.04	Provide advice and accurate information within organisational guidelines on confidentiality
02.05	Keep the reception area tidy and materials up-to-date
02.06	Answer and deal with telephone calls within organisational standards
02.07	Adhere to organisational procedures on entry, security, health and safety

Qualification Framework	: RQF
Title	: Negotiate in a business environment
Unit Level	: Level 3
Unit Sub Level	: None
Guided Learning Hours	: 18
Unit Credit Value	: 4
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: H/506/1912 : Negotiate in a business environment**

**Understand the principles underpinning negotiation**

**Assessment Criterion - The learner can:**

01.01	Describe the requirements of a negotiation strategy
01.02	Explain the use of different negotiation techniques
01.03	Explain how research on the other party can be used in negotiations
01.04	Explain how cultural differences might affect negotiations

**Be able to prepare for business negotiations**

02.01	Identify the purpose, scope and objectives of the negotiation
02.02	Explain the scope of their own authority for negotiating
02.03	Prepare a negotiating strategy
02.04	Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
02.05	Assess the likely objectives and negotiation stances of the other party
02.06	Research the strengths and weaknesses of the other party

**Be able to carry out business negotiations**

03.01	Carry out negotiations within responsibility limits in a way that optimises opportunities
03.02	Adapt the conduct of the negotiation in accordance with changing circumstances
03.03	Maintain accurate records of negotiations, outcomes and agreements made
03.04	Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Qualification Framework	: RQF
Title	: Principles of equality and diversity in the workplace
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 10
Unit Credit Value	: 2
SSAs	: 15.3 Business Management
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: J/506/1806 : Principles of equality and diversity in the workplace**

**Understand the implications of equality legislation**

**Assessment Criterion - The learner can:**

01.01	Define the concept 'equality and diversity'
01.02	Describe the legal requirements for equality of opportunity
01.03	Describe the role and powers of organisations responsible for equality
01.04	Explain the benefits of equal opportunities and diversity
01.05	Explain the potential consequences for an organisation of failing to comply with equality legislation

**Understand organisational standards and expectations for equality and diversity and context in the workplace**

02.01	Explain how organisational policies on equality and diversity translate into day to day activity in the workplace
02.02	Describe their own responsibilities for equality and diversity in the workplace
02.03	Describe behaviours that support equality, diversity and inclusion in the workplace

Qualification Framework	: RQF
Title	: Deal with incidents through a contact centre
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 40
Unit Credit Value	: 7
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: K/503/0421 : Deal with incidents through a contact centre**

**Be able to deal with incidents through a contact centre**

**Assessment Criterion - The learner can:**

01.01	Respond to incoming calls in a calm and professional manner
01.02	Maintain control of the conversation
01.03	Record the contact and information in an incident log in accordance with organisational procedures
01.04	Assess and prioritise reported incidents in accordance with organisational procedures
01.05	Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures
01.06	Provide information, advice and support in response to requests in accordance with organisational procedures
01.07	Escalate incident responses in accordance with organisational procedures

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

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

**Understand how to deal with incidents in a contact centre**

03.01	Describe the incident management services offered by the contact centre
03.02	Describe the impact of regulation or legislation on incident management
03.03	Describe the purpose and use of decision trees
03.04	Describe how to determine the appropriate allocation of resources to incidents
03.05	Describe the boundaries of a contact incident that justify actions being escalated to different levels of response
03.06	Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
03.07	Describe standard wording and codes used by the organisation when dealing with incident management
03.08	Describe the type and extent of resources available for deployment in incident management

Qualification Framework	: RQF
Title	: Carry out direct sales activities in a contact centre
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 15
Unit Credit Value	: 5
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/503/0394 : Carry out direct sales activities in a contact centre**

<b>Be able to gather information needed for direct sales activities in a contact centre</b>	
<b>Assessment Criterion - The learner can:</b>	
01.01	Assemble information about products and/or services that support direct sales
01.02	Obtain from customers sufficient information to support direct sales activities
01.03	Create sales opportunities by making links between information provided by customers and products and/or services
01.04	Find potential new customers for products and/or services
<b>Be able to carry out direct sales to customers through a contact centre</b>	
02.01	Establish customers identity in accordance with organisational procedures
02.02	Check customers wishes and needs
02.03	Identify possible matches with products and/or services from information provided by customers
02.04	Explain to customers the features and benefits of products and/or services for sale
02.05	Adapt their sales approach and style to meet customer preferences
02.06	Maximise opportunities for cross-selling and up-selling
02.07	Complete the authorisation or payment in accordance with organisational procedures
<b>Be able to keep direct sales records within a contact centre</b>	
03.01	Identify the information about customers, products and/or services that should be recorded during the sales process
03.02	Record customer, product and/or service information in accordance with organisational procedures
<b>Be able to comply with regulations and legislation during direct sales in a contact centre</b>	
04.01	Identify the regulatory requirements that have an impact on direct sales activities through a contact centre
04.02	Ensure compliance with regulations during direct selling through a contact centre
<b>Understand how to conduct sales activities in a contact centre</b>	
05.01	Describe the features and benefits of the products and/or services offered or supported by the contact centre
05.02	Describe the organisational policies and procedures for direct sales through a contact centre
05.03	Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities
05.04	Describe the common objections and questions raised by customers during direct selling
05.05	Explain how to identify cross-selling and up-selling opportunities
05.06	Describe different methods of researching potential new customers
05.07	Explain how to retrieve information from organisational sales records
05.08	Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling

Qualification Framework	: RQF
Title	: Manage diary systems
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 12
Unit Credit Value	: 2
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/506/1807 : Manage diary systems**

**Understand the management of diary systems**

**Assessment Criterion - The learner can:**

01.01	Explain the importance of keeping diary systems up to date
01.02	Describe the basis on which bookings and changes are prioritised
01.03	Explain any constraints relating to making bookings for people or facilities
01.04	Describe the types of problems that can occur when managing diaries

**Be able to manage diary systems**

02.01	Obtain the information needed to make diary entries
02.02	Make accurate and timely diary entries
02.03	Respond to changes in a way that balances and meets the needs of those involved
02.04	Communicate up-to-date information to everyone involved
02.05	Keep diaries up-to-date
02.06	Maintain the requirements of confidentiality

Qualification Framework	: RQF
Title	: Contribute to the organisation of an event
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 23
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/506/1869 : Contribute to the organisation of an event**

<b>Understand event organisation</b>	
<b>Assessment Criterion - The learner can:</b>	
01.01	Explain the roles, responsibilities and accountabilities of individuals involved in the event
01.02	Explain the purpose and features of different types of events
01.03	Describe the type of resources needed for different types of events
01.04	Describe the different needs attendees may have and how to meet these
01.05	Explain the requirements of health, safety and security when organising events
01.06	Describe the types of problems that may occur during events and how to deal with them
<b>Be able to carry out pre-event actions</b>	
02.01	Identify venue requirements for an event
02.02	Obtain resources within the agreed timescales
02.03	Distribute pre-event documentation to delegates in accordance with the event plan
02.04	Co-ordinate attendee responses within the agreed timescale
02.05	Identify any special requirements of event attendees
<b>Be able to set up an event</b>	
03.01	Set up layout and resources in accordance with the event plan
03.02	Confirm that all identified resources are in place and meet requirements
03.03	Behave in a way that maintains organisational values and standards
<b>Be able to carry out post-event actions</b>	
04.01	Ensure the venue is restored to the required conditions in accordance with the terms of the contract
04.02	Carry out follow-up actions in accordance with the event plan and agreements made at the event

Qualification Framework	: RQF
Title	: Employee rights and responsibilities
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 16
Unit Credit Value	: 2
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: L/506/1905 : Employee rights and responsibilities**

**Understand the role of organisations and industries**

**Assessment Criterion - The learner can:**

01.01	Explain the role of their own occupation within an organisation and industry
01.02	Describe career pathways within their organisation and industry
01.03	Identify sources of information and advice on an industry, occupation, training and career pathway
01.04	Describe an organisations principles of conduct and codes of practice
01.05	Explain issues of public concern that affect an organisation and industry
01.06	Describe the types, roles and responsibilities of representative bodies and their relevance to their own role

**Understand employers expectations and employees rights and obligations**

02.01	Describe the employer and employee statutory rights and responsibilities that affect their own role
02.02	Describe an employers expectations for employees standards of personal presentation, punctuality and behaviour
02.03	Describe the procedures and documentation that protect relationships with employees
02.04	Identify sources of information and advice on employment rights and responsibilities

Qualification Framework	: RQF
Title	: Processing sales orders
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 17
Unit Credit Value	: 2
SSAs	: 15.4 Marketing and Sales
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: M/502/8587 : Processing sales orders**

**Understand how to process and follow up sales orders**

**Assessment Criterion - The learner can:**

01.01	Explain the importance of sales order processing
01.02	Describe organisational processes for ordering products and/or services
01.03	Describe different sources of information used to check customer credit
01.04	Describe the different payment methods accepted by sales orientated organisations
01.05	Explain the role of the despatch function
01.06	Describe service standards relating to sales order completion
01.07	Explain the importance of storing information securely

**Be able to process sales orders**

02.01	Identify customer sales order requirements
02.02	Check that the credit status of the customer meets organisational standards
02.03	Confirm the availability of products and/or services to the customer
02.04	Ensure that information given to the customer about delivery, timing and price is accurate
02.05	Ensure that the sale is authorised following the organisations procedures
02.06	Finalise the transaction in accordance with organisational procedures
02.07	Ensure that the customer is aware of the terms and conditions of sale
02.08	Ensure that the customers requirements are communicated to those responsible for fulfilling sales orders
02.09	Identify who to go to when in need of support with sales order processing problems

**Be able to follow up sales order processing**

03.01	Keep the customer informed of the sales order progress and any problems with the sale order
03.02	Advise the customer of current discounts and special offers
03.03	Check all information is stored securely

Qualification Framework	: RQF
Title	: Handling objections and closing sales
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 22
Unit Credit Value	: 3
SSAs	: 15.4 Marketing and Sales
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: M/502/8606 : Handling objections and closing sales**

**Understand how to handle sales objections**

**Assessment Criterion - The learner can:**

01.01	Explain the difference
01.02	Explain how to clarify objections and identify potential sales opportunities from them
01.03	Describe how to use questioning techniques to explore and resolve customer issues
01.04	Explain how to empathise with and reassure the customer
01.05	Explain the difference between hypothetical and real objections
01.06	Explain how knowledge of products and services can be used to answer objections
01.07	Explain how competitor activity may affect the potential sale
01.08	Describe how industry/sector pricing structures may have an impact on sales objections
01.09	Explain the scope of authority and responsibility when dealing with objections
01.10	State who to go to when in need of support to overcome objections

**Understand how to close the sale**

02.01	Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale
02.02	Explain how to perform a trial close
02.03	Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
02.04	Explain potential barriers to closing the sale
02.05	Explain a range of ways to close the sale

**Be able to handle objections**

03.01	Clarify the nature and extent of objections
03.02	Explain to the customer the concessions available within the scope of authority
03.03	Follow organisational procedures for dealing with objections
03.04	Promote the benefits of products and/or services to overcome objections
03.05	Use testimonials to overcome objections
03.06	Refer to those in authority when dealing with objections outside the scope of own authority

**Be able to close the sale**

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

Qualification Framework	: RQF
Title	: Buddy a colleague to develop their skills
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 19
Unit Credit Value	: 3
SSAs	: 15.2 Administration
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: M/506/1895 : Buddy a colleague to develop their skills**

**Understand how to buddy a colleague**

**Assessment Criterion - The learner can:**

01.01	Describe what is expected of a buddy
01.02	Explain techniques to give positive feedback and constructive criticism
01.03	Explain techniques to establish rapport with a buddy

**Be able to plan to buddy a colleague**

02.01	Agree which aspects of a colleagues work may benefit from buddying
02.02	Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
02.03	Agree a schedule of meetings that minimise disruption to business
02.04	Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

**Be able to support a buddy colleague carrying out work activities**

03.01	Remain unobtrusive while a buddy colleague carries out their work activities
03.02	Provide examples of how to carry out tasks correctly
03.03	Identify instances of good practice and areas for improvement through observation
03.04	Praise a buddy colleague on well completed tasks
03.05	Give constructive feedback on ways in which a buddy could improve performance
03.06	Offer a buddy hints and tips based on personal experience

Qualification Framework	: RQF
Title	: Meeting customers' after sales needs
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 14
Unit Credit Value	: 3
SSAs	: 15.4 Marketing and Sales
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: R/502/8601 : Meeting customers after sales needs**

**Be able to investigate customer after sales needs**

**Assessment Criterion - The learner can:**

01.01	Establish the nature of customers after sales needs
01.02	Communicate with customers in a way that conforms with quality and customer service standards at all times

**Be able to handle customers after sales needs**

02.01	Deal with customers after sales needs following organisational customer service standards and procedures
02.02	Balance customers needs with those of the organisation
02.03	Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority
02.04	Fulfill commitments made to customers in accordance with quality and customer service standards
02.05	Record commitments made to customers

**Be able to review the after sales process**

03.01	Obtain customers comments on service reliability from customers
03.02	Analyse and report the findings to the relevant person in the organisation
03.03	Make recommendations for improvements to after sales service provision in the light of customer feedback

Qualification Framework	: RQF
Title	: Develop working relationships with colleagues
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 19
Unit Credit Value	: 3
SSAs	: 15.3 Business Management
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: R/506/1789 : Develop working relationships with colleagues**

Understand the principles of effective team working	
Assessment Criterion - The learner can:	
01.01	Outline the benefits of effective team working
01.02	Describe how to give feedback constructively
01.03	Explain conflict management techniques that may be used to resolve team conflicts
01.04	Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
01.05	Explain the importance of warning colleagues of problems and changes that may affect them
Be able to maintain effective working relationships with colleagues	
02.01	Recognise the contribution of colleagues to the achievement of team objectives
02.02	Treat colleagues with respect, fairness and courtesy
02.03	Fulfill agreements made with colleagues
02.04	Provide support and constructive feedback to colleagues
Be able to collaborate with colleagues to resolve problems	
03.01	Take others viewpoints into account when making decisions
03.02	Take ownership of problems within own level of authority
03.03	Take action to minimise disruption to business activities within their own level of authority
03.04	Resolve problems within their own level of authority and agreed contribution

Qualification Framework	: RQF
Title	: Health and Safety Procedures in the Workplace
Unit Level	: Level 2
Unit Sub Level	: None
Guided Learning Hours	: 16
Unit Credit Value	: 2
SSAs	: 14.2 Preparation for Work
Unit Grading Structure	: Pass
Assessment Guidance	: Please refer to the <a href="#">Online iCQ Assessment Guidance</a> .

**Unit: T/505/4673 : Health and Safety Procedures in the Workplace**

**Know health and safety procedures in the workplace.**

**Assessment Criterion - The learner can:**

01.01	Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees.
01.02	Describe two health and safety laws affecting the workplace.
01.03	Define the importance of following health and safety procedures in the workplace.
01.04	Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.

**Be able to carry out tasks with regard to health and safety in the workplace.**

02.01	Carry out a risk assessment of a specified workplace activity.
02.02	Use equipment or tools safely in the workplace.
02.03	Describe how to prevent accidents in the workplace.
02.04	Assess how own health and safety practices could be improved.