



**ITEC**

## VTCT Level 3 Diploma in Customer Service

VRQ

Learner name:

CS3D1

Learner number:

601/4883/4



**iTEC**



**VTCT**

VTCT is a UK Government-approved awarding organisation which has awarded world class qualifications since 1962. Through our strategic approach to sectors we support, we aim to advance education, research and the public dissemination of knowledge, by helping to introduce new initiatives into the education system, to improve the employability and career prospects of learners.

More than 1000 approved centres now work with VTCT, and the ever-expanding list extends across the UK, Ireland, and internationally. We acquired the internationally recognised awarding organisation and examination board iTEC in 2016, adding to our footprint. We also acquired education technology specialists Digital Assess in the same year, adding value for training providers with technology that can digitally capture and assess learners online, amongst other innovations.

iTEC was founded by Dr W.E. Arnould-Taylor who in 1947 was a distinguished physiologist who became a Fellow of the Royal Society of Medicine. Both Dr Arnould-Taylor and Wallace Sharps the founder of VTCT, devoted their lives to developing the standing of the industry and the furtherance of education in the sector. Today iTEC has a close working relationship with over 650 centres worldwide including Europe, South Africa, Asia Pacific and the USA.

VTCT is a registered charity investing in education and skills but also giving to good causes in the area of facial disfigurement.

## Assessor tracking table

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All assessors using this Record of Assessment book must complete this table. This is required for verification purposes.

Assessor name	Assessor signature	Assessor initials	Assessor number (optional)

# VTCT Level 3 Diploma in Customer Service

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**Operational start date:** 1st November 2014  
**Credit value:** 55  
**Total Qualification Time (TQT):** 550  
**Guided learning hours (GLH):** 289  
**Qualification number:** 601/4883/4

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## Statement of unit achievement

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

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

Unit code	Date achieved	Learner signature	Assessor initials	IQA signature (if sampled)
<b>Mandatory units</b>				
UBU52				
UBU53				
UBU55				
UBU56				
UBU57				
UBU54				
<b>Optional units</b>				

# The qualification

## Introduction

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The VTCT Level 3 Diploma in Customer Service is designed to develop your understanding and skills to manage, evaluate and improve customer service performance.

The VTCT Level 3 Diploma in Customer Service provide you with the knowledge and skills to respond to customers' issues on a high level, analysing and implementing improvements to the way customer service is delivered in your organisation. You will develop your understanding of the customer service environment and principles of business to help you organise the delivery to meet your customers' expectations. You will learn how to manage your own development to help you progress within your role.

The optional units range from building your customer relationships to developing a social media strategy for customer service. The range of units allows you to tailor your learning to meet progression needs for your role.

## National Occupational Standards (NOS)

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This qualification has been mapped to the relevant NOS, and is regulated on the Regulated Qualifications Framework (RQF).

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

## Prerequisites

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

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

## Progression

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

- Advance apprenticeship in Customer Service or Business Administration
- VTCT Level 3 Diploma in Business Administration
- VTCT Level 3 Certificate in Management and Leadership

Alternatively, you could progress in employment within customer service in a team leader or managerial role and analysing customer service data.

# Qualification structure

## Total credits required - 55 (minimum)

All mandatory units must be completed and a **minimum of 40 credits** must be achieved at level 3 or above.

Mandatory units - 31 credits					
Unit code	Ofqual unit reference	Unit title	Credit Value	GLH	Level
UBU52	L/506/2150	Organise and deliver customer service	5	27	3
UBU53	Y/506/2152	Understand the customer service environment	5	40	3
UBU55	K/506/2169	Resolve customers' problems	4	19	3
UBU56	D/506/1942	Principles of business	10	74	3
UBU57	T/506/2952	Manage personal and professional development	3	12	3
UBU54	J/506/2910	Understand customers and customer retention	4	35	3

Optional units Group B - 15 credits (minimum)					
Unit code	Ofqual unit reference	Unit title	Credit Value	GLH	Level
UBU58	Y/506/2166	Develop resources to support consistency of customer service delivery	5	21	3
UBU59	D/506/2167	Use service partnerships to deliver customer service	3	20	3
UBU38	R/506/2151	Resolve customers' complaints	4	22	3
UBU39	D/506/2170	Gather, analyse and interpret customer feedback	5	24	3
UBU60	K/506/2172	Monitor the quality of customer service interactions	5	27	3
UBU24	D/506/2119	Communicate verbally with customers	3	14	2
UBU8	T/506/2126	Communicate with customers in writing	3	20	2
UBU26	L/506/2133	Promote additional products and/or services to customers	2	14	2
UBU27	Y/506/2135	Exceed customer expectations	3	15	2
UBU28	T/506/2143	Deliver customer service whilst working on customers' premises	4	20	2
UBU31	F/506/2159	Deliver customer service to challenging customers	3	16	2

### Optional units Group B (continued)

Unit code	Ofqual unit reference	Unit title	Credit Value	GLH	Level
UBU32	Y/506/2149	Develop customer relationships	3	18	2
UBU33	T/506/2160	Support customer service improvements	3	12	2
UBU34	A/506/2161	Support customers through real-time online customer service	3	15	2
UBU36	J/506/2163	Use social media to deliver customer service	3	18	2
UBU61	D/506/2153	Champion customer service	4	17	4
UBU62	R/506/2179	Build and maintain effective customer relations	6	25	4
UBU63	L/506/2181	Manage a customer service award programme	4	15	4
UBU64	Y/506/2183	Manage the use of technology to improve customer service	4	14	4
UBU65	D/506/2962	Develop a social media strategy for customer service	5	16	4
UBU35	H/506/2977	Support customers using self-service equipment	3	18	2
UBU37	K/506/2978	Provide post-transaction customer service	5	22	2

You must complete a minimum of 55 credits: 31 credits from the Mandatory unit group and a minimum of 15 credits from Optional Group B, a maximum of 9 credits can come from Optional Group C.

Optional units Group C - 9 credits (maximum)					
Unit code	Ofqual unit reference	Unit title	Credit Value	GLH	Level
UBU50	H/506/1912	Negotiate in a business environment	4	18	3
UBU66	T/506/1820	Promote equality, diversity and inclusion in the workplace	3	15	3
UBU67	A/506/1821	Manage team performance	4	21	3
UBU68	J/506/1921	Manage individuals' performance	4	20	3
UBU69	M/506/1931	Collaborate with other departments	3	14	3
UBU70	F/502/8612	Negotiating, handling objections and closing sales	4	22	3
UBU71	R/502/8615	Obtaining and analysing sales-related information	4	24	3
UBU72	K/502/8622	Buyer behaviour in sales situations	3	27	3
UBU73	K/503/0418	Manage incidents referred to a contact centre	6	30	3
UBU74	D/503/0397	Lead direct sales activities in a contact centre team	4	8	3
UBU40	L/506/1807	Manage diary systems	2	12	2
UBU42	L/506/1869	Contribute to the organisation of an event	3	23	2
UBU41	H/506/1814	Provide reception services	3	15	2
UBU43	M/506/1895	Buddy a colleague to develop their skills	3	19	2
UBU44	L/506/1905	Employee rights and responsibilities	2	16	2
UBU17	M/502/8587	Processing sales orders	2	17	2
UBU25	J/502/4397	Bespoke software	4	30	3

You must complete a minimum of 55 credits: 31 credits from the Mandatory unit group and a minimum of 15 credits from Optional Group B, a maximum of 9 credits can come from Optional Group C.

# Guidance on assessment

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

## Internal assessment

(any requirements will be shown in the unit)

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

## External assessment

(any requirements will be shown in the unit)

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

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

## Assessment explained

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

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

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

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

## Creating a portfolio of evidence

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

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

Evidence in the portfolio may take the following forms:

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

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



# Unit assessment methods

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

Mandatory units				
		External	Internal	
Unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU52	Organise and deliver customer service	0	✓	✓
UBU53	Understand the customer service environment	0	✗	✓
UBU55	Resolve customers' problems	0	✓	✓
UBU56	Principles of business	0	✗	✓
UBU57	Manage personal and professional development	0	✗	✓
UBU54	Understand customers and customer retention	0	✗	✓

Optional units Group B				
		External	Internal	
Unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU58	Develop resources to support consistency of customer service delivery	0	✗	✓
UBU59	Use service partnerships to deliver customer service	0	✗	✓
UBU38	Resolve customers' complaints	0	✓	✓
UBU39	Gather, analyse and interpret customer feedback	0	✓	✓
UBU60	Monitor the quality of customer service interactions	0	✓	✓
UBU24	Communicate verbally with customers	0	✓	✓
UBU8	Communicate with customers in writing	0	✗	✓
UBU26	Promote additional products and/or services to customers	0	✓	✓
UBU27	Exceed customer expectations	0	✓	✓
UBU28	Deliver customer service whilst working on customers' premises	0	✓	✓

## Optional units Group B (Continued)

		External	Internal	
Unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU31	Deliver customer service to challenging customers	0	✓	✓
UBU32	Develop customer relationships	0	✓	✓
UBU33	Support customer service improvements	0	✗	✓
UBU34	Support customers through real-time online customer service	0	✓	✓
UBU36	Use social media to deliver customer service	0	✓	✓
UBU61	Champion customer service	0	✓	✓
UBU62	Build and maintain effective customer relations	0	✓	✓
UBU63	Manage a customer service award programme	0	✗	✓
UBU64	Manage the use of technology to improve customer service	0	✓	✓
UBU65	Develop a social media strategy for customer service	0	✗	✓
UBU35	Support customers using self-service equipment	0	✓	✓
UBU37	Provide post-transaction customer service	0	✓	✓

## Optional units Group C

		External	Internal	
Unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU50	Negotiate in a business environment	0	✓	✓
UBU66	Promote equality, diversity and inclusion in the workplace	0	✗	✓
UBU67	Manage team performance	0	✓	✓
UBU68	Manage individuals' performance	0	✗	✓
UBU69	Collaborate with other departments	0	✗	✓
UBU70	Negotiating, handling objections and closing sales	0	✓	✓
UBU71	Obtaining and analysing sales-related information	0	✗	✓
UBU72	Buyer behaviour in sales situations	0	✓	✓
UBU73	Manage incidents referred to a contact centre	0	✓	✓
UBU74	Lead direct sales activities in a contact centre team	0	✓	✓
UBU40	Manage diary systems	0	✗	✓
UBU42	Contribute to the organisation of an event	0	✓	✓
UBU41	Provide reception services	0	✓	✓
UBU43	Buddy a colleague to develop their skills	0	✓	✓
UBU44	Employee rights and responsibilities	0	✗	✓
UBU17	Processing sales orders	0	✓	✓
UBU25	Bespoke software	0	✗	✓

# Unit glossary

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

# Notes

Use this area for notes and diagrams



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# Organise and deliver customer service

## UBU52

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The aim of this unit is to develop the knowledge, understanding and skills to organise customer service delivery. You will learn how to plan for unexpected workloads and agree achievable deadlines. You will also be able to identify the customer's expectations and identify how to improve the customer service you deliver.

Level

3

Credit value

5

GLH

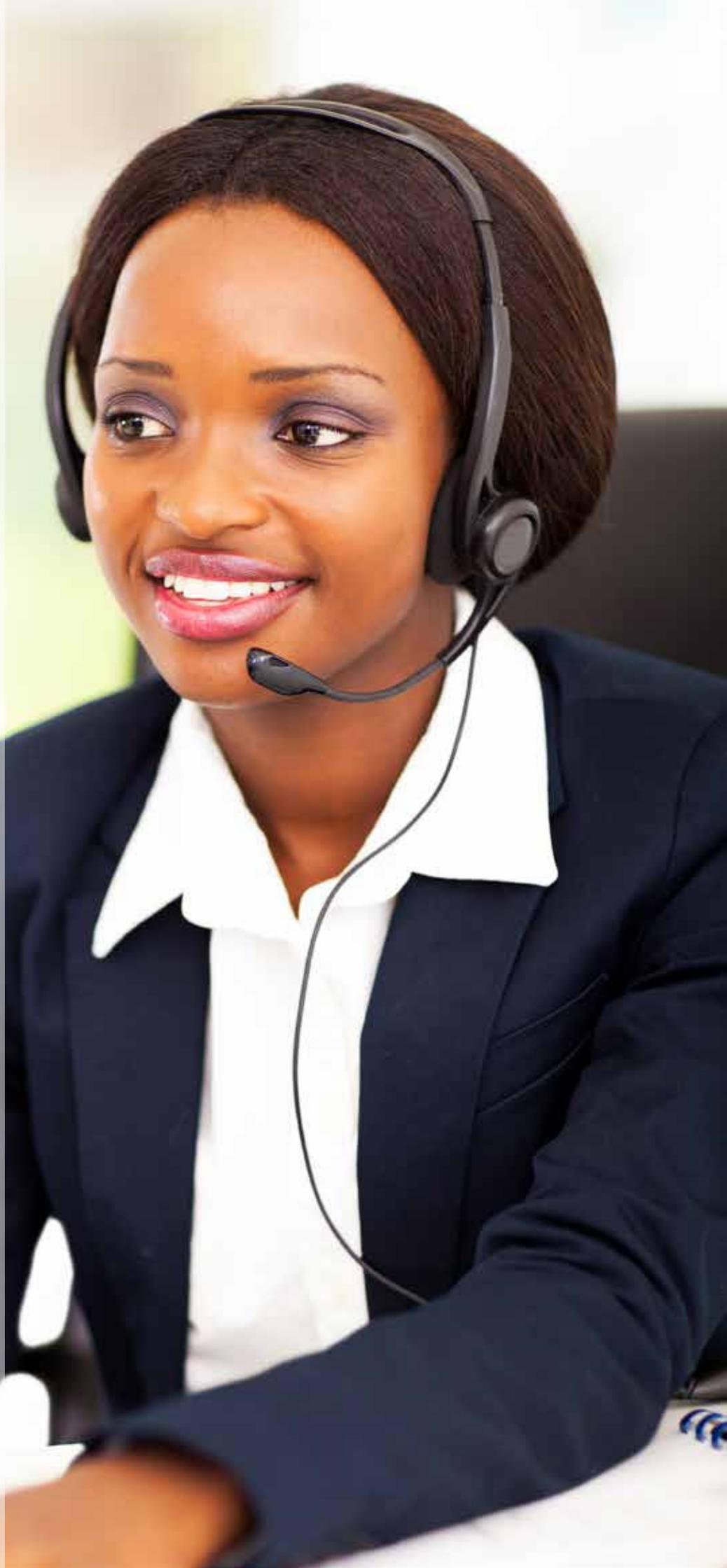
27

Observation(s)

2

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Be able to plan the delivery of customer service
2. Be able to deliver customer service
3. Understand how to organise customer service delivery

### Evidence requirements

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#### 1. Environment

Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).

#### 2. Simulation

Simulation is not allowed in this unit.

#### 3. Observation outcomes

Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence.

Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

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

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

#### 4. Knowledge outcomes

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

#### 5. Tutor/Assessor guidance

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

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

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

#### 6. External paper

There is no external paper requirement for this unit.

# Achieving observations

## Achieving observation outcomes

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

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

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

## Relationship to National Occupational Standards

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Customer Service (2013) National Occupational Standards:

- CFACSB10 Organise the delivery of reliable customer service
- CFACSB2 Deliver reliable customer service

## Learning outcome 1

Be able to plan the delivery of customer service

**You can:**

- a. Identify customers' needs and expectations
- b. Map the "customer journey"
- c. Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service
- d. Prepare the resources needed to deliver products and/or services to different types of customers\*
- e. Plan how to deal with unexpected additional workloads\*
- f. Allocate priorities to address points of service failure\*

\*May be assessed by supplementary evidence.

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

## Learning outcome 2

### Be able to deliver customer service

**You can:**

- a. Take steps to ensure that the needs of customers are balanced with organisational objectives
- b. Agree realistic and achievable actions with customers
- c. Identify areas for improvement in own customer service delivery
- d. Adapt own customer service delivery to meet customers' changing expectations

\*May be assessed by supplementary evidence.

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

# Developing knowledge

## Achieving knowledge outcomes

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

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

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

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

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

\*This is not an exhaustive list.



## Learning outcome 3

Understand how to organise customer service delivery

You can:	Portfolio reference
a. Explain how different methods of promoting products and/or services impact on customer service delivery	
b. Explain who should be involved in the organisation of customer service delivery	
c. Explain the importance of differentiating between customers' wants, needs and expectations	
d. Explain different ways of segmenting customer groups	
e. Explain how customer segmentation is used in organising customer service delivery	
f. Explain how to analyse the "customer journey"	

# Understand the customer service environment

## UBU53

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The aim of this unit is to develop your knowledge and understanding of working in a customer service environment. You will learn about the relationship between the customer and the organisation and how to look for continual improvements to the service delivered.

Level

3

Credit value

5

GLH

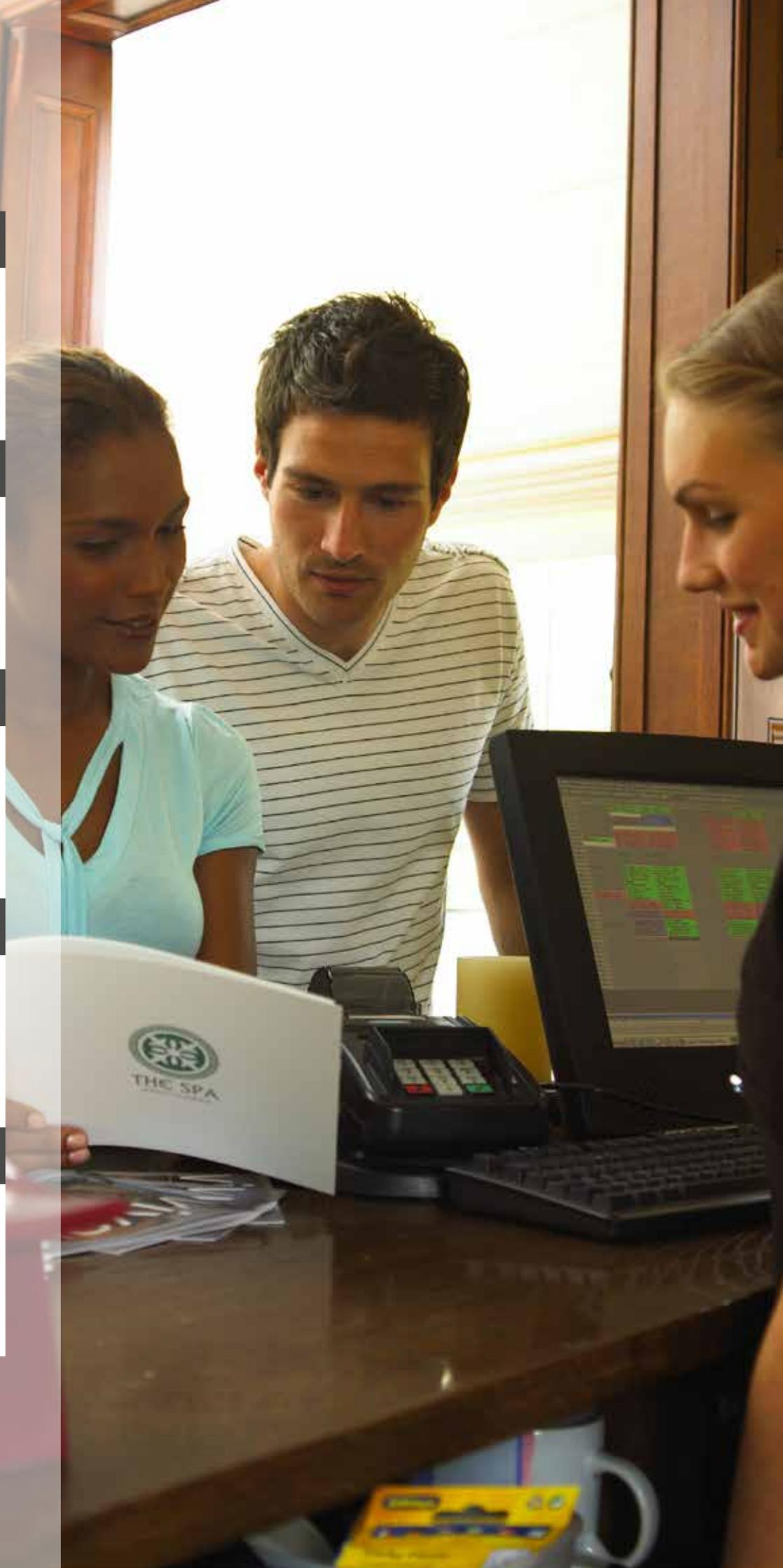
40

Observation(s)

0

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Understand the concepts and practices underpinning customer service delivery
2. Understand the relationship between customer service and a brand
3. Understand the structure of customer service
4. Understand the implications of legislation on customer service delivery

### Evidence requirements

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#### 1. Knowledge outcomes

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

#### 2. Tutor/Assessor guidance

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

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

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

#### 3. External paper

There is no external paper requirement for this unit.

# Developing knowledge

## Achieving knowledge outcomes

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

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

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

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

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

\*This is not an exhaustive list.

## Relationship to National Occupational Standards

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Customer Service (2013) National Occupational Standards:

- CFACSA7 Live up to the brand promise when delivering customer service
- CFACSA14 Use customer service as a competitive tool

## Learning outcome 1

Understand the concepts and practices underpinning customer service delivery

You can:	Portfolio reference
a. Explain the value of customer service as a competitive tool	
b. Explain the process of mapping the customer journey and its importance in delivering effective customer service	
c. Describe techniques used to identify service failures	
d. Explain the concept and importance of the service profit chain	
e. Describe methods of measuring organisational effectiveness in the delivery of customer service	

## Learning outcome 2

Understand the relationship between customer service and a brand

You can:	Portfolio reference
a. Explain the importance of a brand to customers and to an organisation	
b. Explain how branding can influence customers' perception of an organisation and its products and/or services	
c. Explain the potential impact of good and poor customer service on a brand	

## Learning outcome 3

### Understand the structure of customer service

You can:	Portfolio reference
a. Explain the features of different customer service models and customer service standards	
b. Explain the relationship between customer service and operational areas of an organisation	
c. Explain the relationship between customer service and continuous improvement processes	
d. Explain the costs and benefits of customer service to an organisation	
e. Explain the impact of organisational values on how customers create their expectations	
f. Explain how organisational values impact on meeting customer expectations	

## Learning outcome 4

Understand the implications of legislation on customer service delivery

You can:	Portfolio reference
a. Explain the implications of consumer-related legislation on customer service delivery	
b. Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information	

# Resolve customers' problems

## UBU55

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The aim of this unit is to develop your knowledge, understanding and skills to monitor and resolve customers' problems. You will learn how to explain to customers the options available to resolve their problems and agree solutions that meet both the customers' and organisation's requirements. You will also learn how to monitor customers' problems and evaluate the effectiveness of the resolution.

Level

3

Credit value

4

GLH

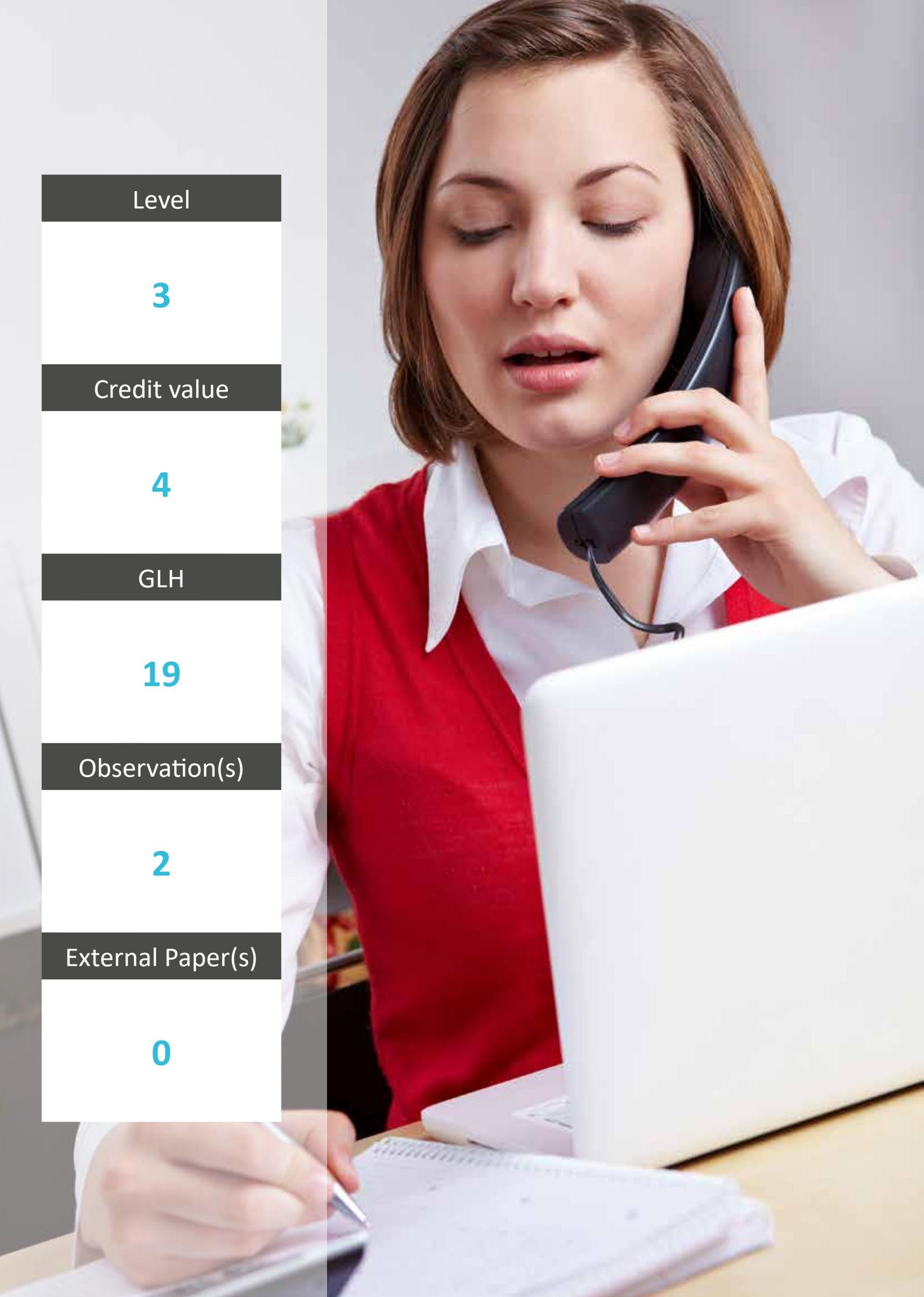
19

Observation(s)

2

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Be able to deal with customers' problems
2. Understand the monitoring and resolution of customers' problems

### Evidence requirements

---

#### 1. Environment

Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).

#### 2. Simulation

Simulation is not allowed in this unit.

#### 3. Observation outcomes

Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

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

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

#### 4. Knowledge outcomes

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

#### 5. Tutor/Assessor guidance

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

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

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

#### 6. External paper

There is no external paper requirement for this unit.

# Achieving observations

## Achieving observation outcomes

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

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

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

## Relationship to National Occupational Standards

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Customer Service (2013) National Occupational Standards:

- CFACSC5 Monitor and solve customer service problems

## Learning outcome 1

### Be able to deal with customers' problems

**You can:**

- a. Confirm the nature and cause of customers' problems
- b. Explain when customers' problems should be treated as complaints
- c. Explain the benefits to customers and the organisation of the options available to solve problems
- d. Explain the drawbacks to customers and the organisation of the options available to solve problems
- e. Explain to customers the options for resolving their problems
- f. Agree solutions that meet customers' and organisational requirements within their own levels of authority
- g. Inform colleagues of the nature of problems and actions taken
- h. Evaluate the effectiveness of the resolution of customers' problems\*
- i. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems

\*May be assessed by supplementary evidence.

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

## Achieving knowledge outcomes

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

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

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

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

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

\*This is not an exhaustive list.

## Learning outcome 2

Understand the monitoring and resolution of customers' problems

You can:	Portfolio reference
a. Assess the suitability of a range of techniques for monitoring customer problems	
b. Explain how to use the resolution of customers' problems to improve products and/or services	
c. Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance	
d. Explain the features of negotiating techniques used to resolve customers' problems	

# Notes

Use this area for notes and diagrams



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# Principles of business

## UBU56

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The aim of this unit is to develop your knowledge and understanding of business principles. You will learn about the business market and how an organisation shapes its objective around the market. You will also learn how to use and manage a budget and understand the financial management for an organisation.

Level

**3**

Credit value

**10**

GLH

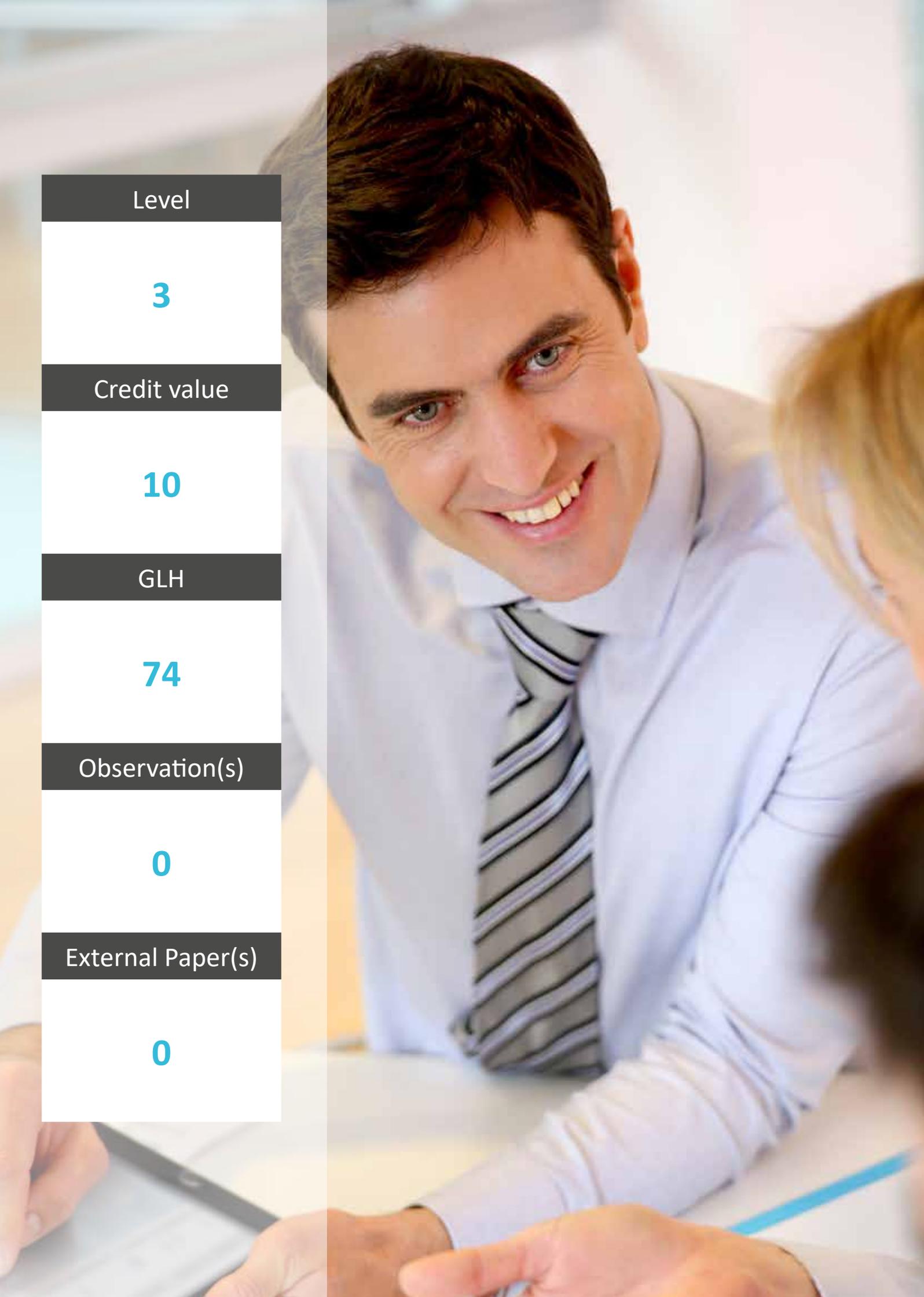
**74**

Observation(s)

**0**

External Paper(s)

**0**



### Learning outcomes

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#### On completion of this unit you will:

1. Understand business markets
2. Understand business innovation and growth
3. Understand financial management
4. Understand business budgeting
5. Understand sales and marketing

### Evidence requirements

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#### 1. Knowledge outcomes

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

#### 2. Tutor/Assessor guidance

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

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

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

#### 3. External paper

There is no external paper requirement for this unit.

# Developing knowledge

## Achieving knowledge outcomes

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

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

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

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

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

\*This is not an exhaustive list.

## Relationship to National Occupational Standards

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Business and Administration (2013) National Occupational Standards:

- CFABAA112 Contribute to innovation in a business environment

## Learning outcome 1

### Understand business markets

You can:	Portfolio reference
a. Explain the characteristics of different business markets	
b. Explain the nature of interactions between businesses within a market	
c. Explain how an organisation's goals may be shaped by the market in which it operates	
d. Describe the legal obligations of a business	

## Learning outcome 2

### Understand business innovation and growth

You can:	Portfolio reference
a. Define business innovation	
b. Explain the uses of models of business innovation	
c. Identify sources of support and guidance for business innovation	
d. Explain the process of product or service development	
e. Explain the benefits, risks and implications associated with innovation	

## Learning outcome 3

### Understand financial management

You can:	Portfolio reference
a. Explain the importance of financial viability for an organisation	
b. Explain the consequences of poor financial management	
c. Explain different financial terminology	

## Learning outcome 4

### Understand business budgeting

You can:	Portfolio reference
a. Explain the uses of a budget	
b. Explain how to manage a budget	

## Learning outcome 5

### Understand sales and marketing

You can:	Portfolio reference
a. Explain the principles of marketing	
b. Explain a sales process	
c. Explain the features and uses of market research	
d. Explain the value of a brand to an organisation	
e. Explain the relationship between sales and marketing	

# Notes

Use this area for notes and diagrams



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# Manage personal and professional development

## UBU57

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The aim of this unit is to develop your knowledge, understanding and skills to manage your own personal and professional development. You will learn how to evaluate your current and future development needs and identify how they can be met. You will also learn how to obtain feedback on your performance and review your progress to make amendments to your development plan in the light of feedback.

Level

3

Credit value

3

GLH

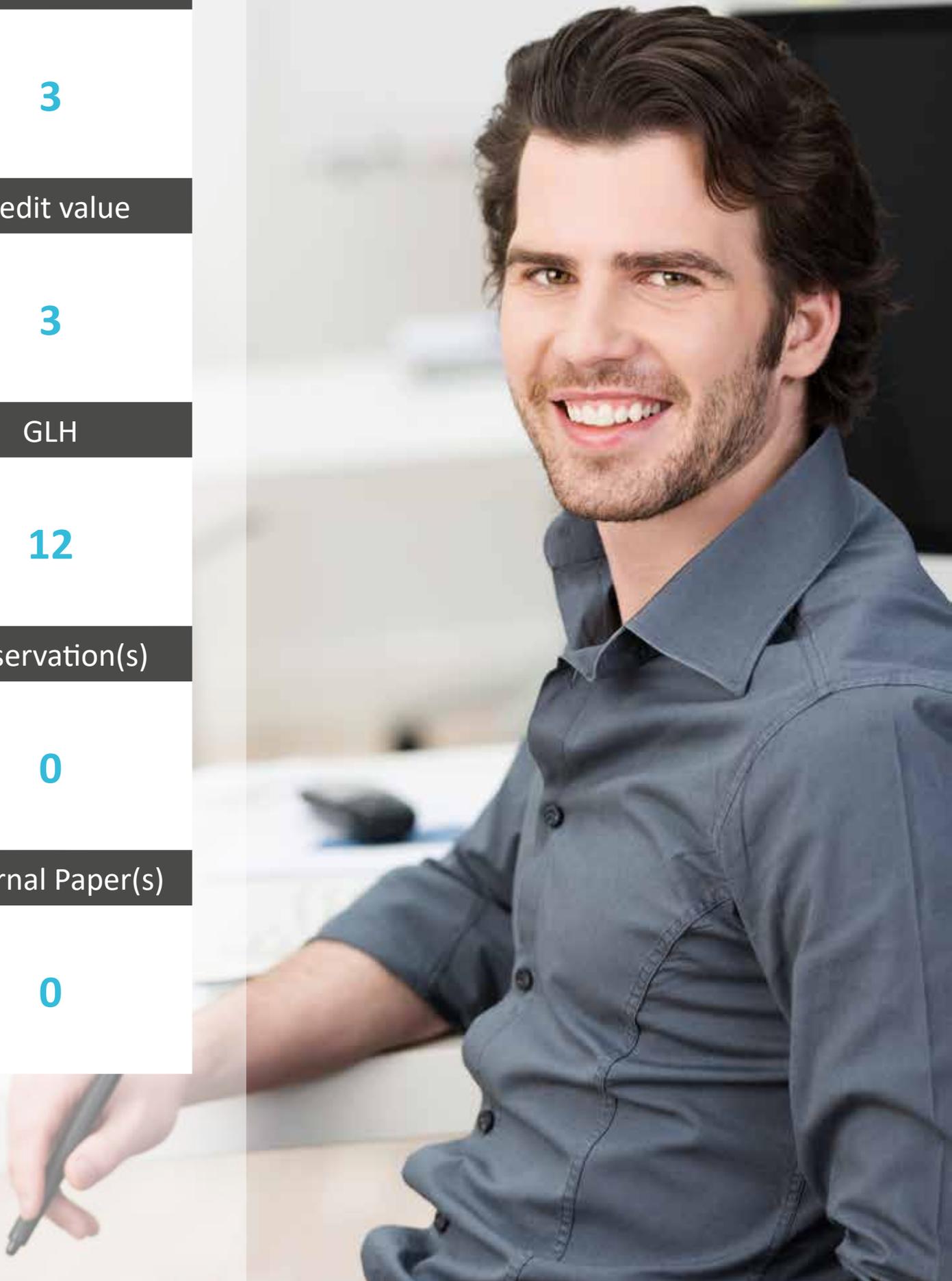
12

Observation(s)

0

External Paper(s)

0



## Learning outcomes

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### On completion of this unit you will:

1. Be able to identify personal and professional development requirements
2. Be able to fulfil a personal and professional development plan
3. Be able to maintain the relevance of a personal and professional development plan

## Evidence requirements

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### 1. Knowledge outcomes

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

### 2. Tutor/Assessor guidance

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

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

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

### 3. External paper

There is no external paper requirement for this unit.

# Developing knowledge

## Achieving knowledge outcomes

---

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

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

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

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

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

\*This is not an exhaustive list.

## Relationship to National Occupational Standards

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Management and Leadership (2012) National Occupational Standards:

- CFAM&LFA5 Manage projects

## Learning outcome 1

Be able to identify personal and professional development requirements

You can:	Portfolio reference
a. Compare sources of information on professional development trends and their validity	
b. Identify trends and developments that influence the need for professional development	
c. Evaluate your current and future personal and professional development needs relating to the role, the team and the organisation	

## Learning outcome 2

Be able to fulfil a personal and professional development plan

You can:	Portfolio reference
a. Evaluate the benefits of personal and professional development	
b. Explain the basis on which types of development actions are selected	
c. Identify current and future likely skills, knowledge and experience needs using skills gap analysis	
d. Agree a personal and professional development plan that is consistent with business needs and personal objectives	
e. Execute the plan within the agreed budget and timescale	
f. Take advantage of development opportunities made available by professional networks or professional bodies	

## Learning outcome 3

Be able to maintain the relevance of a personal and professional development plan

You can:	Portfolio reference
a. Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives	
b. Obtain feedback on performance from a range of valid sources	
c. Review progress toward personal and professional objectives	
d. Amend the personal and professional development plan in the light of feedback received from others	

# Notes

Use this area for notes and diagrams



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# Understand customers and customer retention

## UBU54

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The aim of this unit is to develop your knowledge and understanding of customer relationships and the benefits of a loyal customer to an organisation. You will learn about customer retention and the techniques to attract and retain customers to your organisation.

Level

3

Credit value

4

GLH

35

Observation(s)

0

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Understand Customer Relationship Management (CRM)
2. Understand customer retention
3. Understand the measurement of customer satisfaction

### Evidence requirements

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#### 1. Knowledge outcomes

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

#### 2. Tutor/Assessor guidance

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

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

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

#### 3. External paper

There is no external paper requirement for this unit.

# Developing knowledge

## Achieving knowledge outcomes

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

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

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

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

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

\*This is not an exhaustive list.

## Relationship to National Occupational Standards

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Customer Service (2013) National Occupational Standards:

- CFACSB14 Review the quality of customer service
- CFACSB15 Build and maintain effective customer relations

## Learning outcome 1

### Understand Customer Relationship Management (CRM)

You can:	Portfolio reference
a. Explain the concept of the “customer experience”	
b. Explain different methods of segmenting and characterising customers	
c. Explain the purpose and scope of CRM	
d. Describe the features of an effective CRM system	
e. Explain the uses of CRM data in customer service delivery	

## Learning outcome 2

### Understand customer retention

You can:	Portfolio reference
a. Explain the term customer retention	
b. Explain the benefits of customer retention to an organisation	
c. Explain the factors that influence customer retention	
d. Describe techniques used to attract and retain customers	
e. Explain how to assess the extent of customer loyalty	
f. Explain the factors involved in customer recovery	

## Learning outcome 3

### Understand the measurement of customer satisfaction

You can:	Portfolio reference
a. Describe techniques used to analyse performance data	
b. Explain the factors to be taken into account in setting performance targets and objectives	
c. Explain the features and uses of a range of techniques to measure customer satisfaction	

# Notes

Use this area for notes and diagrams



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# Notes

Use this area for notes and diagrams



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VTCT, Aspire House, Annealing Close, Eastleigh,  
Hampshire SO50 9PX United Kingdom

Web:- [www.itecworld.co.uk](http://www.itecworld.co.uk)

Email:- [customersupport@vtct.org.uk](mailto:customersupport@vtct.org.uk)



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