

# 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

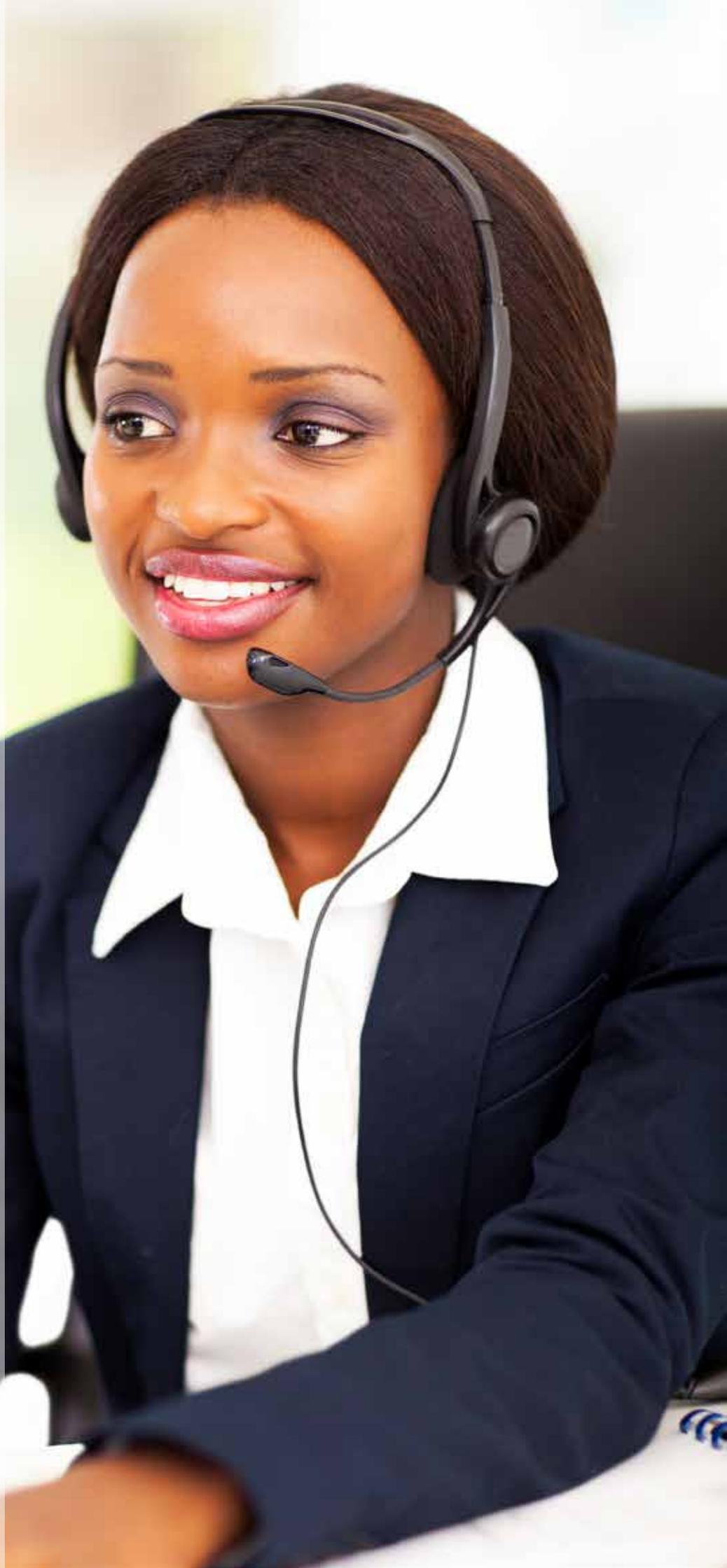
27

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"	