

**NCFE Level 2 Diploma for Customer Service Practitioners (603/5681/9)**

**Statement of authenticity**

Learner name:

Centre number:

Centre name:

**Signatures**

Learner: Date:

Tutor/Assessor: Date:

Internal Quality Assurer (IQA)\*: Date:

External Quality Assurer (EQA)\*: Date:

\* For completion if part, or all, of the evidence has been sampled by the Internal and/or External Quality Assurer

**Unit 01 Understand the principles of delivering customer service (F/618/0495)**

**Learning outcome 1**

**You will:** Understand customer service

You must:

|  |  |
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| **1.1 Explain the purpose and scope of customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.2 Describe the stages of the** customer journey | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 01 Understand the principles of delivering customer service (F/618/0495)**

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| **1.3 Explain the importance of delivering consistently high quality customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.4 Explain barriers to providing effective customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.5 Explain the effects on the organisation of poor customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 01 Understand the principles of delivering customer service (F/618/0495)**

**Learning outcome 2**

**You will:** Know the legislation and regulations that apply to customer service

You must:

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| **2.1 Describe how sales and consumer-related legislation and regulations affect the delivery of customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.2 Describe how health, safety and environmental legislation affects customer service delivery** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 01 Understand the principles of delivering customer service (F/618/0495)**

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| **2.3 Explain how equality legislation affects customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.4 Describe how legislation affects the use and storage of customer information** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.5 Describe your responsibilities in meeting the requirements of** legislation **when delivering customer service and how to apply this in your role** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

**Learning outcome 1**

**You will:** Understand the purpose, aim and values of an organisation and identify its customers

You must:

|  |  |
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| **1.1 Outline the aim and purpose of the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.2 Explain the distinctions between internal and external customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.3 Identify the** customers **of the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

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| **1.4 Identify the core values of the organisation and how these are portrayed to customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.5 Describe how the core values link to the culture of the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

**Learning outcome 2**

**You will:** Understand the importance of customer service to a brand

You must:

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| **2.1 Describe the products or services that are available from the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.2 Explain the importance of brand to an organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.3 Describe the brand promise of the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

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| **2.4 Outline your own role in ensuring that a brand promise is delivered** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

**Learning outcome 3**

**You will:** Know an organisation’s internal policies and procedures that apply to customer service

You must:

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| **3.1 Outline the organisation’s policies and procedures for handling customers throughout the** customer journey | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **3.2 Describe the key features of the organisation’s customer complaints procedure** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 02 Understand an organisation and its customers (J/618/0496)**

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| **3.3**  **Explain the organisation’s procedures and standards of behaviour for dealing with challenging customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **3.4 Describe the uses of** digital media **for communicating with customers within the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **3.5**  **Describe the organisation’s guidelines for the use of** digital media | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

**Learning outcome 1**

**You will:** Understand how to create a positive customer experience

You must:

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| **1.1 Explain what is meant by a customer-focused experience** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.2 Explain how establishing the facts enables you to create a customer-focused experience** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.3 Explain the difference between customers’ expectations and needs and the service offer** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

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| **1.4 Describe how to manage customers’ expectations** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.5 Explain the importance of following up actions and keeping promises when delivering customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.6 Explain how you take responsibility for meeting customer needs and expectations throughout the** customer journey | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

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| **1.7 Describe why it is important to build trust with customers and how this can be achieved** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.8 Provide a personalised customer service experience to a range of customers with differing needs** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.9 Keep customers informed of progress while resolving issues** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

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| **1.10 Take action to ensure that customers are satisfied before closing** dialogue | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

**Learning outcome 2**

**You will:** Be able to support customers with an organisation’s products and services

You must:

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| **2.1 Keep up-to-date with the products and/or services that the organisation offers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **2.2 Provide information to the customer on the features and benefits of different products or services** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 03 Understand and deliver high quality customer experience (L/618/0497)**

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| **2.3 Provide alternative solutions when the customer needs or expectations cannot be met** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.4 Agree a solution that balances customer satisfaction and organisational needs** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.5 Deliver customer service in line with organisational policies and procedures** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

**Learning outcome 1**

**You will:** Be able to engage effectively with customers

You must:

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| **1.1 Describe different** questioning techniques **that can be used when communicating with customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.2 Use** questioning techniques **to gather information about the customer’s needs** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

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| **1.3 Describe a range of effective listening skills** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.4 Describe how the tone of voice and body language can show how a customer may be feeling** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.5 Use** effective techniques **to build rapport with a customer and achieve a positive outcome** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

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| **1.6 Confirm understanding with the customer in an** appropriate way | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.7 Use an appropriate tone of voice in face-to-face communication, written communication and** digital communication **which reflects the organisation’s brand** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.8 Select the most** appropriate method of communication **for dealing with customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

**Learning outcome 2**

**You will:** Be able to handle customer complaints, conflict and challenge

You must:

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| **2.1 Describe the specific needs of different customers, including those protected under current equality legislation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.2 Describe different types of challenging customers in the customer service environment** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

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| **2.3 Demonstrate patience and calmness when dealing with complaints or challenging situations** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.4 Adapt own communication style to meet customers’ needs and expectations** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.5 Show, through the use of communication behaviours, that you understand the customer’s point of view** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

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| **2.6 Adapt approach in accordance with customers’ changing behaviour** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **2.7 Use** techniques **to manage service recovery** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **2.8 Refer issues to another member of the team as required, passing on necessary information in order to resolve a customer service issue** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 04 Effectively communicate with a range of customers (R/618/0498)**

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| **2.9 Refer customers to other sources of help if their problems cannot be resolved** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **2.10 Maintain organisational standards of behaviour and communication when interacting with customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 05 Support and improve customer service (Y/618/0499)**

**Learning outcome 1**

**You will:** Understand the scope of customer service information

You must:

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| **1.1 Describe the** systems, equipment and technology **that can be used to deliver customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.2 Demonstrate the use of** systems, equipment and technology **to support customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

**Unit 05 Support and improve customer service (Y/618/0499)**

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| **1.3 Explain how customer service information can be used** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.4 Maintain accurate records of customer issues** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 05 Support and improve customer service (Y/618/0499)**

**Learning outcome 2**

**You will:** Understand how to improve customer service

You must:

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| **2.1 Explain the purpose of encouraging customers to provide feedback** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.2 Describe** ways of measuring and evaluating **the effectiveness of customer service** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 05 Support and improve customer service (Y/618/0499)**

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| **2.3 Identify new ways of helping customers based on their feedback, presenting recommendations to others** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **2.4 Explain the importance to an organisation of balancing its needs with the needs of its customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

**Learning outcome 1**

**You will:** Be able to develop self-awareness and personal effectiveness

You must:

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| **1.1 Describe your role, responsibilities and goals within the team and the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.2 Explain the limits of your own authority when dealing with customer service problems** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

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| **1.3 Outline the targets you need to deliver against** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.4 Seek and use feedback from others to develop own customer service knowledge and skills** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.5 Identify your own development needs in the customer service role and propose solutions** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

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| **1.6 Present a professional image by using appropriate language and dress code in line with organisational standards** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **1.7 Prioritise own workload** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

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| **1.8** **Complete customer service tasks to meet deadlines** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

**Learning outcome 2**

**You will:** Be able to work effectively within a team

You must:

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| **2.1 Describe the benefits of working effectively as a team** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.2 Explain how own actions can impact on the team and the organisation** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
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| **IQA/EQA feedback** | |

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| **2.3 Support others in meeting the needs of customers** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |

**Unit 06 Understand and develop your role within the team and the organisation (F/618/0500)**

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| **2.4 Work with others to share knowledge, ideas and good practice** | |
| **What have you done to show this?** | Location of evidence (eg hyperlink/portfolio page number) |
|  |  |
| **IQA/EQA feedback** | |