

EDI Level 3 Certificate in Customer Service



Supporting learning
and performance

Specification

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Introduction

About EDI

EDI is one of the largest awarders of accredited vocational qualifications in the UK and has been involved in providing qualifications for employment for over 100 years. We work with over 1400 centres and we award over 140,000 vocational qualification certificates every year. Our vocational qualifications are developed in collaboration with industry and are used by students and employers as a benchmark for practical skills and quality. They include QCF Qualifications, National Vocational Qualifications (NVQs), Scottish Vocational Qualifications (SVQs), Vocationally Related Qualifications (VRQs), Technical Certificates, apprenticeships and Skills for Life qualifications.

EDI qualifications are accredited on the Qualifications and Credit Framework and are eligible for government funding. EDI offers unrivalled centre support, through online administration, resources and customer care.

In addition, EDI provides a wide range of services for training providers, colleges, employers and schools including customised assessments, bespoke training programmes, innovative interactive online assessments mapped to the national curriculum, an electronic portfolio system, access to high volume printing and broadband facilities. For more details, please visit the EDI website: www.ediplc.com.

What is the QCF?

The Qualifications and Credit Framework (QCF) is a unitised qualification framework underpinned by a system of credit accumulation and transfer. Every unit on the framework will have a credit value which is based on the notional learning hours for that specific unit (for further information, see the section: *What is credit?*). The QCF is designed to allow learners to achieve credit for individual units or qualifications, providing learners with the opportunity to accumulate credit at their own pace and use it to claim for a qualification when they are ready.

Qualifications within the QCF

There are three sizes of qualifications in the QCF:

- **Awards** (1-12 credits)
- **Certificates** (13-36 credits)
- **Diplomas** (37 credits or more)

It is possible to have all three of these qualifications at each level, for example, Level 1 Award, Certificate or Diploma in Business Skills. This is because the classification of the qualification as an Award, Certificate or Diploma refers to the size of the qualification, not the level of difficulty.

Each qualification title will contain the **level** of qualification (eg Entry 2), the **size** (award/certificate/diploma) and details indicating the **content** of qualification. For example:

- **EDI Level 2 Award in Business Skills**
- **EDI Level 1 Certificate for IT Users (ITQ)**

What is credit?

Every unit and qualification on the QCF has been given a credit value, which denotes the number of credits that will be awarded to each candidate who successfully completes the unit or qualification.

- **1 credit represents 10 notional learning hours**

Notional learning hours represent the amount of time a learner is expected to take, on average, to complete the learning outcomes of the unit to the standard required within the assessment criteria. This may involve self directed study or independent research. It is important to note that notional learning hours are **not** the same as guided learning hours (GLH). GLH represent the hours during which a tutor or trainer is present and contributing to the learning process. Notional learning hours represent the hours which are needed to successfully cover all the learning required to achieve the unit, either guided or independently.

Rules of combination

Every qualification on the QCF is structured through rules of combination. Rules of combination are important because they define the number of credits which need to be achieved and where these credits must come from in order for a learner to achieve the qualification. Rules of combination also state what the potential is for learners to transfer credits between qualifications and awarding bodies.

QCF IT System

QCA have worked in partnership with the agency, Managing Information Across Partners (MIAP) in order to set up a learner registration system. This service has been designed to support the QCF and facilitate the process of credit accumulation and transfer. The learner registration system allows learning providers to request Unique Learner Numbers (ULN) and individual Learner Achievement Records (LAR) for all candidates who wish to complete a unit or qualification on the QCF.

The Learner Achievement Record (LAR) is an electronic system which enables learners to record their achievements in a central location. Learners are able to make their LAR visible to potential employers and learning providers as required. QCA have developed a guidance document entitled, *Learning Provider's Guide to Using the QCF IT System*, which is available to download on the QCA or EDI website.

If you would like further information regarding the QCF IT system please contact MIAP, either through their website: www.miap.gov.uk/lrs/ or email: lrssupport@miap.gov.uk.

EDI Level 3 Certificate in Customer Service

Aim

This qualification underpins the knowledge and understanding of the mandatory units within the EDI Level 3 Certificate in Customer Service. It is appropriate for students of customer service or employees working within a customer service role. The qualification is recognised as the knowledge and understanding element of the advanced apprenticeship in customer service.

Credit

The EDI Level 3 Certificate in Customer Service has a credit value of 13.

Previous learning requirements

There are no formal entry requirements for this qualification.

Progression

Learners may progress onto level 4 qualifications, either in customer service or another area such as management. They may also progress on to more senior positions within employment.

Guided learning hours

We recommend that **105** guided learning hours (GLHs) provide a suitable course length for an 'average' learner at this level.

Guided learning hours include direct contact hours, as well as other time when learners are completing work that has been agreed with teachers or training providers. It is the responsibility of the centre to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible, therefore, that the number of GLHs can vary significantly from one training provider to another according to learners' needs

Candidates with particular assessment requirements

We recognise that some candidates will have particular assessment requirements. EDI's policy for candidates with particular requirements is stated in the 'Administration Guide for EDI Centres', which is available via www.ediplc.com or by contacting enquiries@ediplc.com.

Centre approval

You, the provider, must be approved to offer this qualification. To gain centre approval, please contact Customer Services on 08707 202909 between the hours of 0830 and 1700 Monday to Friday or by email on enquiries@ediplc.com.

Appeals Procedure for Learners

This procedure applies to all competency based qualifications and units of qualifications. If a learner is dissatisfied with an exam/test result, they will need to follow the Exams Procedure.

If learners are dissatisfied with an assessment outcome, they have the right to Appeal. The main reasons for an appeal are likely to be:

- Learners do not understand why they are not yet regarded as competent, because of unsatisfactory feedback from the Assessor
- Learners believe they are competent and that the Assessor has misjudged them, or has failed to utilise some vital evidence.

EDI expects most appeals from learners to be resolved within the centre. EDI will only consider a learner's appeal after the centre's internal appeals procedure has been fully exhausted.

Stage 1 – Appeal to the Centre

If learners have received a decision as to their competence with which they are dissatisfied, they have the right to appeal directly to the Assessor who carried out the assessment. This appeal must be in writing and clearly indicate:

- The points of disagreement
- The evidence in the portfolio that the learner believes meets the requirements of the Performance Criteria and/or knowledge for claiming competence.

The Assessor must give a clear judgement, in writing, to the learner within 10 working days stating justification for the decision.

If learners are not satisfied with the outcome they can next appeal to the Centre's Internal Quality Verifier. This appeal must be in writing, but need not repeat the detail provided to the assessor. The original written appeal to the Assessor, and the Assessor's judgement, must be made available to the Internal Verifier/Assurer. Centres are entitled to have further internal phases to Stage 1, but must communicate this to all learners.

The Internal Quality Verifier/Assurer must give a clear judgement, in writing to the learner within 10 working days stating justification for the decision.

Stage 2 – Appeal to the awarding body

A fee will be charged for an external review (please see current fee sheet). This fee will be refunded if the appeal is upheld.

Learners who are not satisfied with the outcomes of the Internal Quality Verifier/Assurer's decision and who have exhausted the Centre's internal appeals procedure may proceed by appealing to EDI. This appeal must be in writing to the Quality Assurance Manager (email qualityassurance@ediplc.com), be accompanied by copies of all documentation from Stage 1 and submitted within three weeks of the receipt of the outcome from the Internal Quality Verifier/Assurer. Learners must also advise their centres that they have made a formal appeal to EDI.

EDI will acknowledge receipt of the appeal within three working days. The Quality Assurance Manager will work with an appropriate member of staff who has had no prior involvement with the centre to investigate that all the necessary stages have been correctly completed and documented.

Internal Review

A review of the grounds for Appeal will be undertaken by the Quality Assurance Manager, together with a sector specific Quality Advisor. The purpose of the review will be to consider whether the centre's original judgement was sound and may include the following:

- A discussion with the centre and/or learner and EDI personnel
- A request for further information from the centre, learner or EDI personnel
- A centre visit by authorised EDI personnel
- Any other action that EDI deems appropriate to resolve the case.

The outcome of the appeal, including the results of any further reviews of the evidence, will be communicated to the learner and centre within 10 working days of the conclusion of any further work authorised.

External Review

If learners remain dissatisfied following the internal review, they may apply to the Appeals Panel.

The Appeals Panel will comprise three independent members, the Innovation Manager and a member of the Quality Assurance Department. One of the independent members shall be appointed chair of the Panel.

The Appeals Panel will review the case and determine whether the action that EDI has taken to resolve the case has been both sufficient and appropriate.

The Panel will either:

- (a) Agree that the action that EDI has taken has been both sufficient and appropriate and therefore reject the appeal; or
- (b) Uphold the appeal and authorise further action to be carried out. The further action may include:
 - The appointment of an independent Assessor
 - Any other action that the Appeals Panel deems appropriate to resolve the case.

The outcome of the appeal, including the results of any further action, will be communicated to the learner and centre within 10 working days of the conclusion of any further work authorised.

Note – The decision of the Appeals Panel is final.

Note – Every centre should have its own appeals policy and procedure

Appeal to Regulatory Body

Following appeal to the awarding body, if learners are unsatisfied with the result, then they are entitled to appeal to the relevant regulatory body.

- NVQ/QCF regulatory body – Ofqual (Office of Qualifications and Examinations Regulation)
- SVQ regulatory body – SQA (Scottish Qualifications Authority)

Structure of the Qualification

To achieve the EDI Level 3 Certificate in Customer Service learners must achieve thirteen credits from completing two mandatory units.

Unit	Title	GLH	Credit
CT180	Level 3 Principles of Customer Service Delivery	50GLH	6
CU1080	Level 3 Developing and Improving the Customer Service Process	55GLH	7

Assessment Methods

One unit in this qualification will be assessed through a multiple choice test and the second unit will be assessed internally.

Unit	Assessment method	Description
CT180 Principles of Customer Service Delivery	Multiple choice	30 questions, 1 hour
CU1080 Developing and Improving the Customer Service Process	Internal Assessment	Workbook

Internal Assessment

The internal assessment task is set and moderated by EDI, and marked by the centre, against the assessment criteria in the unit.

The task set by EDI is available to registered centres through the EDI website and consists of a workbook, which learners are able to contextualise to their own experiences. Where this qualification is taken as part of an apprenticeship the assessment task can additionally be used as evidence towards the competence based element.

For the purposes of this qualification the learner's place of work, work placement or an organisation that they are familiar with are all permissible as the context. Where the evidence is used as part of the competence based element of apprenticeship, the context must be a realistic working environment.

Assessment and Grading Criteria

The unit is achieved by meeting each of the assessment criteria, outlined in the unit specification. All of the assessment criteria must be met for the unit concerned.

A unit certificate is awarded to learners who pass that unit. There are no further categories of the pass, the certificate is not graded.

CT180: Principles of Customer Service Delivery

Aim

To enable the learner to understand how customer service delivery and legislation affects customer expectations.

Credit 6

GLH 50

Learning outcomes The learner will	Assessment criteria The learner can
1. Describe the principles which impact on customer expectations	1.1 Identify the differences in working in a customer service role within different sectors 1.2 Explain what is meant by customer expectations and how these are formed 1.3 Describe how to balance the needs and expectations of the customer with those of the organisation
2. Identify how behaviour, communication and interpersonal skills affect customer expectations and satisfaction	2.1 Describe how the individual's and the customer's behaviours affect expectations 2.2 Identify and use different methods of communication to meet a range of customer expectations 2.3 Identify different types of non verbal communication and their impact 2.4 Explain the interpersonal skills which can be used to achieve customer satisfaction 2.5 Identify possible barriers to effective communication
3. Describe solutions to customer service problems and complaints within organisational constraints	3.1 Describe techniques for dealing with customer service problems or complaints 3.2 Describe the factors that need to be considered when finding a solution to a customer service problem 3.3 Identify solutions to customer problems and complaints 3.4 Explain why a complaint should be viewed in a positive manner 3.5 Describe how the use of record keeping systems help manage and support the customer service process

<p>4 Explain how legislation affects the customer service process</p>	<p>4.1 Identify and explain how relevant legislation affects the customer service process</p> <p>4.2 Identify and explain the relevant legislation relating to customer record keeping and its implications</p> <p>4.3 Explain the importance of maintaining security and confidentiality of data</p> <p>4.4 Define different forms of contracts and describe what makes a contract binding</p> <p>4.5 Explain the purpose of codes of practice and describe their relationship to customer service</p>
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CU1080: Developing and Improving the Customer Service Process

Aim

To enable the learner to understand how the customer service process can be developed and improved through customer feedback, promotion of products and services and effective teamwork.

Credit 7

GLH 55

Learning outcomes The learner will	Assessment criteria The learner can
1. Explain how customer feedback can improve the customer service process	1.1 Describe the benefits of evaluating the customer service experience 1.2 Describe and compare a range of techniques used in monitoring customer service delivery 1.3 Design a method of obtaining customer feedback 1.4 Explain how the outcome of an organisational SWOT analysis can be used to promote a cycle of continuous improvement 1.5 Explain the techniques used to monitor and review the impact of any changes introduced in an organisation to customers, employees and the organisation
2. Describe the process of promoting products and services	2.1 Explain how Unique Selling Points (USP) can influence the customer choice of products and services 2.2 Define what a Unique Service Offer (USO) is and how it is used to differentiate service offers from that of competitors 2.3 Explain how organisations promote their products and services 2.4 Describe how cost benefit analysis would influence the method used to promote a product or service 2.5 Describe the importance of evaluating promotions

<p>3 Explain the importance of effective teamwork and the monitoring of performance</p>	<p>3.1 Identify different communication techniques used when managing a team</p> <p>3.2 Describe the inter-personal skills required for effective team working</p> <p>3.3 Explain the importance of effective service partnerships for the delivery of excellent customer service</p> <p>3.4 Explain the dynamics of team working</p> <p>3.5 Explain why it is important to agree set goals with team members</p> <p>3.6 Explain the methods used by organisations to set levels of customer service performance</p> <p>3.7 Identify methods for monitoring the performance of individual and teams</p> <p>3.8 Explain how team members can self - assess and develop their customer service skills and knowledge</p> <p>3.9 Complete a personal development plan</p>
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EDI

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