Qualification Specification
601/3687/X
iCQ Level 3 Diploma in Customer Service (RQF)

Qualification Details

Title :	iCQ Level 3 Diploma in Customer Service (RQF)
Awarding Organisation :	iCan Qualifications Limited
Fees Price List Url :	https://icanqualify.net
Qualification Type :	RQF
Qualification Sub Type :	None
Qualification Level :	Level 3
Qualification Sub Level :	None
EQF Level :	Level 4
Regulation Start Date :	20-Jun-2014
Operational Start Date :	01-Sep-2014
Offered In England :	Yes
Offered In Wales :	Yes
Offered In Northern Ireland :	Yes
Assessment Language In English :	Yes
Assessment Language In Welsh :	No
Assessment Language In Irish :	No
SSA :	15.2 Administration
Purpose :	D. Confirm occupational competence and/or 'licence to practice'
Sub Purpose :	D1. Confirm competence in an occupational role to the standards required
Total Credits :	55
Min Credits at/above Level :	40
Minimum Guided Learning Hours :	289
Maximum Guided Learning Hours :	375
Diploma Guided Learning Hours :	0
Barring Classification Code :	ZZZZ
Overall Grading Type :	Pass
Assessment Methods :	Portfolio of Evidence
Structure Requirements :	To achieve this qualification learners must complete a minimum of 55 credits: 31 credits from Mandatory Group A and a minimum of 15 credits from Optional Group B. A maximum of 9 credits can come from Optional Group C.
Age Ranges :	Pre-16 : No; 16-18 : Yes; 18+ : No; 19+ : Yes
Qualification Objective :	This qualification is for thise who are in a senior or supervisory position in a customer service role and are looking to develop their skills, knowledge and understanding

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Rules of Combination (ROC)

Group Name	Mandatory	#Units	Minimum Units	Maximum Units	Minimum Credits	Maximum Credits
CMG) Compound	**Yes**	0	2	3	55	0
└─ A) Mandatory Group A	**Yes**	6	6	6	31	31
└─ B) Optional Group B	**Yes**	22	3	0	15	0
└─ C) Optional Group C	No	17	1	0	0	9

Group A Mandatory Group A

URN	Title	Level	GLH	Credit
D/506/1942	Principles of business	3	74	10
J/506/2910	Understand customers and customer retention	3	35	4
K/506/2169	Resolve customers problems	3	19	4
L/506/2150	Organise and deliver customer service	3	27	5
T/506/2952	Manage personal and professional development	3	12	3
Y/506/2152	Understand the customer service environment	3	40	5

Group B Optional Group B

URN	Title	Level	GLH	Credit
A/506/2161	Support customers through real-time online customer service	2	15	3
D/506/2119	Communicate verbally with customers	2	14	3
D/506/2153	Champion customer service	4	17	4
D/506/2167	Use service partnerships to deliver customer service	3	20	3
D/506/2170	Gather, analyse and interpret customer feedback	3	24	5
D/506/2962	Develop a social media strategy for customer service	4	16	5
F/506/2159	Deliver customer service to challenging customers	2	16	3
H/506/2977	Support customers using self-service equipment	2	18	3
J/506/2163	Use social media to deliver customer service	2	18	3
K/506/2172	Monitor the quality of customer service interactions	3	27	5
K/506/2978	Provide post-transaction customer service	2	22	5
L/506/2133	Promote additional products and/or services to customers	2	14	2
L/506/2181	Manage a customer service award programme	4	15	4
R/506/2151	Resolve customers complaints	3	22	4
R/506/2179	Build and maintain effective customer relations	4	25	6
T/506/2126	Communicate with customers in writing	2	20	3
T/506/2143	Deliver customer service whilst working on customers premises	2	20	4
T/506/2160	Support customer service improvements	2	12	3
Y/506/2135	Exceed customer expectations	2	15	3
Y/506/2149	Develop customer relationships	2	18	3
Y/506/2166	Develop resources to support consistency of customer service delivery	3	21	5
Y/506/2183	Manage the use of technology to improve customer service	4	14	4

Group C Optional Group C

URN	Title	Level	GLH	Credit
A/506/1821	Manage team performance	3	21	4
D/503/0397	Lead direct sales activities in a contact centre team	3	8	4
F/502/8612	Negotiating, handling objections and closing sales	3	22	4
H/506/1814	Provide reception services	2	15	3
H/506/1912	Negotiate in a business environment	3	18	4
J/502/4397	Bespoke Software	3	30	4
J/506/1921	Manage individuals performance	3	20	4
K/502/8622	Buyer behaviour in sales situations	3	27	3
K/503/0418	Manage incidents referred to a contact centre	3	30	6
L/506/1807	Manage diary systems	2	12	2
L/506/1869	Contribute to the organisation of an event	2	23	3
L/506/1905	Employee rights and responsibilities	2	16	2
M/502/8587	Processing sales orders	2	17	2
M/506/1895	Buddy a colleague to develop their skills	2	19	3

M/506/1931	Collaborate with other departments	3	14	3
R/502/8615	Obtaining and analysing sales-related information	3	24	4
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	15	3

Unit Specification
D/506/1942
Principles of business

Qualification Framework :	RQF
Title :	Principles of business
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	74
Unit Credit Value :	10
SSAs :	15.2 Administration
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: D/506/1942 : Principles of business	
Understand business markets	
Assessment Criterion - The learner can:	
01.01	Explain the characteristics of different business markets
01.02	Explain the nature of interactions between businesses within a market
01.03	Explain how an organisations goals may be shaped by the market in which it operates
01.04	Describe the legal obligations of a business
Understand business innovation and growth	
02.01	Define business innovation
02.02	Explain the uses of models of business innovation
02.03	Identify sources of support and guidance for business innovation
02.04	Explain the process of product or service development
02.05	Explain the benefits, risks and implications associated with innovation
Understand financial management	
03.01	Explain the importance of financial viability for an organisation
03.02	Explain the consequences of poor financial management
03.03	Explain different financial terminology
Understand business budgeting	
04.01	Explain the uses of a budget
04.02	Explain how to manage a budget
Understand sales and marketing	
05.01	Explain the principles of marketing
05.02	Explain a sales process
05.03	Explain the features and uses of market research
05.04	Explain the value of a brand to an organisation
05.05	Explain the relationship between sales and marketing

Unit Specification
J/506/2910
Understand customers and customer retention

Qualification Framework : RQF
Title : Understand customers and customer retention
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 35
Unit Credit Value : 4
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: J/506/2910 : Understand customers and customer retention	
Understand Customer Relationship Management (CRM)	
Assessment Criterion - The learner can:	
01.01	Explain the concept of the customer experience
01.02	Explain different methods of segmenting and characterising customers
01.03	Explain the purpose and scope of CRM
01.04	Describe the features of an effective CRM system
01.05	Explain the uses of CRM data in customer service delivery
Understand customer retention	
02.01	Explain the term customer retention
02.02	Explain the benefits of customer retention to an organisation
02.03	Explain the factors that influence customer retention
02.04	Describe techniques used to attract and retain customers
02.05	Explain how to assess the extent of customer loyalty
02.06	Explain the factors involved in customer recovery
Understand the measurement of customer satisfaction	
03.01	Describe techniques used to analyse performance data
03.02	Explain the factors to be taken into account in setting performance targets and objectives
03.03	Explain the features and uses of a range of techniques to measure customer satisfaction

Unit Specification
K/506/2169
Resolve customers problems

Qualification Framework :	RQF
Title :	Resolve customers' problems
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	19
Unit Credit Value :	4
SSAs :	15.2 Administration
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: K/506/2169 : Resolve customers problems	
Understand the monitoring and resolution of customers problems	
Assessment Criterion - The learner can:	
01.01	Assess the suitability of a range of techniques for monitoring customer problems
01.02	Explain how to use the resolution of customers problems to improve products and/or services
01.03	Explain how the successful resolution of customers problems contributes to customer loyalty and enhanced business performance
01.04	Explain the features of negotiating techniques used to resolve customers problems
Be able to deal with customers problems	
02.01	Confirm the nature and cause of customers problems
02.02	Explain when customers problems should be treated as complaints
02.03	Explain the benefits to customers and the organisation of the options available to solve problems
02.04	Explain the drawbacks to customers and the organisation of the options available to solve problems
02.05	Explain to customers the options for resolving their problems
02.06	Agree solutions that meet customers and organisational requirements within their own levels of authority
02.07	Inform colleagues of the nature of problems and actions taken
02.08	Evaluate the effectiveness of the resolution of customers problems
02.09	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers problems

Unit Specification
L/506/2150
Organise and deliver customer service

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Qualification Framework : RQF
Title : Organise and deliver customer service
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 27
Unit Credit Value : 5
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: L/506/2150 : Organise and deliver customer service
Understand how to organise customer service delivery
Assessment Criterion - The learner can:
01.01	Explain how different methods of promoting products and/or services impact on customer service delivery
01.02	Explain who should be involved in the organisation of customer service delivery
01.03	Explain the importance of differentiating between customers wants, needs and expectations
01.04	Explain different ways of segmenting customer groups
01.05	Explain how customer segmentation is used in organising customer service delivery
01.06	Explain how to analyse the customer journey
Be able to plan the delivery of customer service
02.01	Identify customers needs and expectations
02.02	Map the customer journey
02.03	Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service
02.04	Prepare the resources needed to deliver products and/or services to different types of customers
02.05	Plan how to deal with unexpected additional workloads
02.06	Allocate priorities to address points of service failure
Be able to deliver customer service
03.01	Take steps to ensure that the needs of customers are balanced with organisational objectives
03.02	Agree realistic and achievable actions with customers
03.03	Identify areas for improvement in their own customer service delivery
03.04	Adapt their own customer service delivery to meet customers changing expectations

Qualification Framework : RQF
Title : Manage personal and professional development
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 12
Unit Credit Value : 3
SSAs : 15.3 Business Management
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: T/506/2952 : Manage personal and professional development	
Be able to identify personal and professional development requirements	
Assessment Criterion - The learner can:	
01.01	Compare sources of information on professional development trends and their validity
01.02	Identify trends and developments that influence the need for professional development
01.03	Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
Be able to fulfil a personal and professional development plan	
02.01	Evaluate the benefits of personal and professional development
02.02	Explain the basis on which types of development actions are selected
02.03	Identify current and future likely skills, knowledge and experience needs using skills gap analysis
02.04	Agree a personal and professional development plan that is consistent with business needs and personal objectives
02.05	Execute the plan within the agreed budget and timescale
02.06	Take advantage of development opportunities made available by professional networks or professional bodies
Be able to maintain the relevance of a personal and professional development plan	
03.01	Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
03.02	Obtain feedback on performance from a range of valid sources
03.03	Review progress toward personal and professional objectives
03.04	Amend the personal and professional development plan in the light of feedback received from others

Unit Specification
Y/506/2152
Understand the customer service environment

Qualification Framework : RQF
Title : Understand the customer service environment
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 40
Unit Credit Value : 5
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: Y/506/2152 : Understand the customer service environment

Understand the concepts and practices underpinning customer service delivery

Assessment Criterion - The learner can:

01.01	Explain the value of customer service as a competitive tool
01.02	Explain the process of mapping the customer journey and its importance in delivering effective customer service
01.03	Describe techniques used to identify service failures
01.04	Explain the concept and importance of the service profit chain
01.05	Describe methods of measuring organisational effectiveness in the delivery of customer service

Understand the relationship between customer service and a brand

02.01	Explain the importance of a brand to customers and to an organisation
02.02	Explain how branding can influence customers perception of an organisation and its products and/or services
02.03	Explain the potential impact of good and poor customer service on a brand

Understand the structure of customer service

03.01	Explain the features of different customer service models and customer service standards
03.02	Explain the relationship between customer service and operational areas of an organisation
03.03	Explain the relationship between customer service and continuous improvement processes
03.04	Explain the costs and benefits of customer service to an organisation
03.05	Explain the impact of organisational values on how customers create their expectations
03.06	Explain how organisational values impact on meeting customer expectations

Understand the implications of legislation on customer service delivery

04.01	Explain the implications of consumer-related legislation on customer service delivery
04.02	Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

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

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

Unit: A/506/2161 : Support customers through real-time online customer service
Understand how to support customers through real-time online customer service
Assessment Criterion - The learner can:
01.01	Explain how an organisations online customer service system works
01.02	Explain how to navigate their own customer service site
01.03	Describe the questioning techniques that may be used when supporting customers through real-time on-line customer services
01.04	Explain how to adapt their own communication style to meet customers ability to use online systems
Be able to establish the customer service support needed by customers
02.01	Identify customers familiarity with the site
02.02	Identify the difficulties faced by customers when navigating websites
02.03	Identify the support for customers that will meet their needs
Be able to support online customer service in real-time
03.01	Step through screen sequences while the customer operates the system
03.02	Communicate with customers in terms they can understand
03.03	Inform customers of what is happening and why certain steps are required
03.04	Adhere to organisational policies and procedures, legal and ethical requirements when supporting customers through on-line customer service

Unit Specification
D/506/2119
Communicate verbally with customers

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

Unit: D/506/2119 : Communicate verbally with customers	
Understand how to communicate verbally with customers	
Assessment Criterion - The learner can:	
01.01	Explain the importance of effective communication in customer service
01.02	Explain how tone of voice, choice of expression and body language can affect the way customers perceive their experience
01.03	Explain why customer service language is used
01.04	Describe different questioning techniques that can be used when communicating with customers
01.05	Describe verbal and non-verbal signals that show how a customer may be feeling
01.06	Describe the types of information needed when communicating verbally with customers
Be able to use customer service language to communicate with customers	
02.01	Identify customers wants and priorities
02.02	Listen actively to what customers are saying
02.03	Communicate clearly, concisely and professionally with customers
02.04	Use a tone of voice and expression that reinforces messages when communicating with customers
02.05	Use language that reinforces empathy with customers
02.06	Adapt their response in accordance with customers changing behaviour
02.07	Provide information and advice that meets customers needs
02.08	Maintain organisational standards of behaviour and communication when interacting with customers
02.09	Check that customers have understood what has been communicated
02.10	Adhere to organisational policies and procedures, legal and ethical requirements when communicating verbally with customers

Unit Specification
D/506/2153
Champion customer service

Qualification Framework : RQF
Title : Champion customer service
Unit Level : Level 4
Unit Sub Level : None
Guided Learning Hours : 17
Unit Credit Value : 4
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: D/506/2153 : Champion customer service	
Understand how to champion customer service	
Assessment Criterion - The learner can:	
01.01	Evaluate the importance of viewing operations from the customers viewpoint
01.02	Analyse the role of service partners in providing customer service
01.03	Evaluate the effectiveness of information collection systems and reports
01.04	Describe organisational decision-making processes and limits of their own authority
01.05	Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements
01.06	Describe activities that give added value to the service chain
Be able to identify the scope for improvements to customer service	
02.01	Monitor customer service delivery to identify issues that are important to customer service
02.02	Analyse the implications of improvements to customer service
02.03	Identify customer service issues relating to new products and/or services
02.04	Identify the strategic and managerial implications of changes to customer service and the service offer
Be able to champion customer service	
03.01	Promote the role of customer service within an organisations operational plans
03.02	Inform individual staff members about their role in championing customer service
03.03	Promote the benefits of effective customer service
03.04	Provide validated customer service advice and information to colleagues
03.05	Support others to identify areas for improvement to customer service
03.06	Monitor the effectiveness of advice and information given
03.07	Take actions to ensure that customer service delivery meets agreed standards

Unit Specification
D/506/2167
Use service partnerships to deliver customer service

Qualification Framework :	RQF
Title :	Use service partnerships to deliver customer service
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	20
Unit Credit Value :	3
SSAs :	15.2 Administration
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: D/506/2167 : Use service partnerships to deliver customer service	
Understand the use of a service partnership in customer service delivery	
Assessment Criterion - The learner can:	
01.01	Explain the roles and responsibilities of the partners involved in a service chain
01.02	Explain the advantages and limitations of using a service partnership
01.03	Explain the use and value of formal and informal service level agreements
Understand ways of building relationships within a customer service partnership	
02.01	Describe effective communication methods for dealing with service partners
02.02	Explain how to develop positive relationships with service partners
02.03	Describe negotiating techniques for dealing with service partners
02.04	Describe actions that can be taken to resolve any conflict of interest with service partners
Be able to deliver customer service within a customer service partnership	
03.01	Identify the levels of authority that exist within a service partnership
03.02	Keep service partnership colleagues up to date with progress, developments and issues that might affect the quality of delivery
03.03	Establish service procedures that are acceptable to all members of a service partnership
03.04	Agree with service partners priorities and resolutions relating to conflicts of interest
03.05	Identify areas for improvement from the analysis of a range of sources of information

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

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

Unit: D/506/2170 : Gather, analyse and interpret customer feedback
Understand how to gather, analyse and interpret customer feedback
Assessment Criterion - The learner can:
01.01	Describe methods of collecting data for customer research
01.02	Explain random sampling techniques used to collect data
01.03	Explain how to evaluate bias in non-random samples
01.04	Explain the principles of questionnaire design
01.05	Assess the suitability of a range of techniques to analyse customer feedback
01.06	Explain techniques used to monitor the quality of data collected
01.07	Explain the use of software to record and analyse customer feedback
01.08	Explain the validation issues associated with customer feedback
01.09	Explain the importance of anonymising comments from customers who do not wish to be identified
Be able to plan the collection of customer feedback on customer service issues
02.01	Identify the objectives of collecting customer feedback
02.02	Justify the reasons for selecting different data collection methods
02.03	Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe
Be able to gather customer feedback
03.01	Collect customer feedback using the sampling frame identified in a customer service plan
03.02	Record data in a way that makes analysis straightforward
03.03	Verify that all data is handled in line with legal, organisational and ethical policies and procedures
Be able to analyse and interpret customer feedback to recommend improvements
04.01	Use data analysis methods to identify patterns and trends in customer feedback
04.02	Use the findings of a data analysis to identify areas for improvement to customer service
04.03	Present the findings of an analysis in the agreed format
04.04	Recommend improvements in response to the findings of an analysis

Qualification Framework : RQF
Title : Develop a social media strategy for customer service
Unit Level : Level 4
Unit Sub Level : None
Guided Learning Hours : 16
Unit Credit Value : 5
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: D/506/2962 : Develop a social media strategy for customer service
Understand the development of a customer service social media strategy
Assessment Criterion - The learner can:
01.01	Explain the role of social media within the organisations customer service strategy
01.02	Analyse the components and scope of a social media strategy and its links with other aspects of the organisation
01.03	Explain the importance of marketing and brand values for the organisations strategy
01.04	Explain the functionality and features of external social media tools
01.05	Analyse media management tools in relation to social networking
01.06	Evaluate the way in which the organisations use of social media contributes to business performance
Be able to develop a customer service social media strategy
02.01	Evaluate the factors affecting the development of a customer service social media strategy
02.02	Assess the suitability of different methods of engaging customers using social media
02.03	Analyse competitor presence and activity in social media
02.04	Formulate a vision for a social media strategy that takes account of the organisations operating environment and practical constraints
02.05	Develop a strategy that is consistent with the organisations overall business strategy and objectives and addresses identified risks
02.06	Evaluate the extent to which existing organisational structures and processes are capable of delivering the strategy
Be able to promote the benefits of social media networking to customer service
03.01	Evaluate the benefits and drawbacks of using social media for dissemination purposes
03.02	Analyse the benefits and consequences of social media engagement with customers
03.03	Promote on-going dialogue with customers through social networking
03.04	Act as a social media champion within the organisation
03.05	Analyse the risks attached to the use of social media

Unit Specification
F/506/2159
Deliver customer service to challenging customers

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

Unit: F/506/2159 : Deliver customer service to challenging customers
Understand the delivery of customer service to challenging customers
Assessment Criterion - The learner can:
01.01 Describe different types of challenging customers in the customer service environment
01.02 Explain an organisations procedures and standards of behaviour for dealing with challenging customers
01.03 Explain behaviours that make it challenging to deal with customers
01.04 Explain the difference between assertive and aggressive behaviour
01.05 Describe techniques to deal with customers challenging behaviour
01.06 Explain their own levels of authority for agreeing actions outside the service offer
01.07 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters
Be able to deal with challenging customers
02.01 Identify the signs that indicate that a customer is challenging
02.02 Express understanding of customers point of view without admitting liability
02.03 Explain to customers the limits of the service they can offer
02.04 Explain to customers the reasons for an organisations position and policy
02.05 Agree a way forward that balances customer satisfaction and organisational needs
02.06 Obtain help from colleagues when options for action are beyond their level of authority
02.07 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

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

Unit: H/506/2977 : Support customers using self-service equipment
Understand how to support customers using self-service equipment
Assessment Criterion - The learner can:
01.01	Explain how the self-service equipment works
01.02	Describe problems that are commonly encountered by customers when using self-service equipment
01.03	Explain demonstration techniques to use when supporting customers using self-service equipment
01.04	Explain organisational procedures for the use of equipment and fault reporting
Be able to identify the help needed by customers using self-service equipment
02.01	Identify signs that show when a customer is having difficulty with the self-service equipment
02.02	Identify a style and level of intervention that meets customers needs
Be able to help customers to use self-service equipment
03.01	Maintain a professional, polite and approachable manner while monitoring customers use of equipment
03.02	Use staff override functions to enable self-service equipment to be used by customers
03.03	Explain to customers how to use the equipment and complete the transaction
03.04	Report equipment-related errors and issues to the right person

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

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

Unit: J/506/2163 : Use social media to deliver customer service
Understand social media in a business environment
Assessment Criterion - The learner can:
01.01	Explain how different social media platforms can be used for customer service
01.02	Describe different audience groups for a range of social media platforms
01.03	Explain the importance of monitoring customer posts in social media networks
01.04	Explain organisational policy and guidelines for the use of social media for customer service purposes
01.05	Explain the etiquette of communication within different social media platforms
01.06	Explain the importance of security settings and how they are used on different social media platforms
01.07	Identify the information that can be shared when colleagues are involved in exchanges using social media
Be able to deal with customers using social media
02.01	Monitor social media to identify customer questions, requests and comments
02.02	Make responses that are appropriate to posts made by customers on social media networks
02.03	Take action to ensure that customers are satisfied before closing dialogue
02.04	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers using social media

Unit Specification
K/506/2172
Monitor the quality of customer service interactions

Qualification Framework : RQF
Title : Monitor the quality of customer service interactions
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 27
Unit Credit Value : 5
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: K/506/2172 : Monitor the quality of customer service interactions	
Understand how to monitor the quality of customer service interactions	
Assessment Criterion - The learner can:	
01.01	Describe techniques for monitoring the quality of customer service interactions
01.02	Explain organisational procedures and guidelines for customer service delivery
01.03	Explain the advantages and limitations of different methods for monitoring the quality of customer service interactions
01.04	Explain how to construct a representative sample of customer service interactions for monitoring purposes
01.05	Explain how data protection legislation applies to monitoring the quality of customer service interactions
01.06	Explain how monitoring actions taken can identify possible improvements in customer service interactions
01.07	Explain techniques to gather customer feedback
Be able to prepare to monitor the quality of customer service interactions	
02.01	Identify the criteria against which the quality of customer service interactions will be monitored
02.02	Specify a sampling frame that would provide information to meet monitoring objectives
02.03	Select monitoring techniques that are capable of collecting the required information
02.04	Ensure that staff and customers are made aware of the fact that they will be monitored
Be able to monitor the quality of customer service interactions	
03.01	Monitor the quality of customer service interactions with minimal disruption to business
03.02	Assess the quality of customer service interactions against agreed criteria
03.03	Identify patterns and trends in colleagues performance
03.04	Give constructive feedback to colleagues on the quality of customer service interactions

Unit Specification
K/506/2978
Provide post-transaction customer service

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

Unit: K/506/2978 : Provide post-transaction customer service	
Understand post-transaction customer service	
Assessment Criterion - The learner can:	
01.01	Explain organisational policies and procedures for post-transaction customer service
01.02	Explain the purposes and range of post-transaction activities
01.03	Explain the implications of sales contracts, guarantees and warranties to post-transaction customer service
01.04	Explain how legislation and regulation affect customers rights
01.05	Explain the advantages and disadvantages of post-transaction customer service programmes
Be able to provide post-transaction customer service	
02.01	Implement a programme of planned post-transaction interventions in line with organisational guidelines
02.02	Use unplanned opportunities post-transaction to provide customer service
02.03	Identify reasons for contacting customers post-transaction
02.04	Confirm customers levels of satisfaction post-transaction
02.05	Make recommendations to decision makers to enhance customer satisfaction
02.06	Present a professional and helpful image

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

Unit: L/506/2133 : Promote additional products and/or services to customers
Understand the promotion of additional products and/or services to customers
Assessment Criterion - The learner can:
01.01	Describe organisational policies and procedures on the promotion of additional products and/or services
01.02	Explain the importance of keeping product/service knowledge up to date
01.03	Explain how to match products and/or services to customer needs
01.04	Describe techniques to promote additional products and/or services
Be able to promote additional products and/or services to customers
02.01	Identify opportunities to promote additional products and/or services that are likely to improve the customer experience
02.02	Promote the benefits of additional products and/or services that are likely to be of interest to customers
02.03	Provide information to customers that will help them to decide whether to select additional products and/or services
02.04	Adhere to organisational policies and procedures, legal and ethical requirements when promoting products and/or services

Qualification Framework : RQF
Title : Manage a customer service award programme
Unit Level : Level 4
Unit Sub Level : None
Guided Learning Hours : 15
Unit Credit Value : 4
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: L/506/2181 : Manage a customer service award programme
Understand the management of a customer service award programme
Assessment Criterion - The learner can:
01.01 Justify the reasons for an award programme
01.02 Explain how to make use of a customer service award programme as a promotional tool
01.03 Explain the likely impact of organisational culture on a customer service award programme
01.04 Explain the requirements of a business case for a customer service award programme
Be able to plan a customer service award programme
02.01 Define specific, measurable, achievable, realistic and time-bound (SMART) objectives for the award programme
02.02 Evaluate the benefits, drawbacks and costs of different options for a customer service award programme
02.03 Select the option that best meets the objectives of the award programme
02.04 Develop a plan that specifies roles, responsibilities, actions, resources, contingencies and timescales
02.05 Develop award criteria that are transparent and fair
Be able to manage a customer service award programme
03.01 Promote the award programme with the dual purpose of motivating team members and engaging customers
03.02 Take action to ensure that award winners are recognised in a way that demonstrates organisational commitment to excellent customer service
03.03 Evaluate the effectiveness of a customer service award programme

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

Unit: R/506/2151 : Resolve customers complaints
Understand the monitoring and resolution of customers complaints
Assessment Criterion - The learner can:

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

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

Unit Specification
R/506/2179
Build and maintain effective customer relations

Qualification Framework : RQF
Title : Build and maintain effective customer relations
Unit Level : Level 4
Unit Sub Level : None
Guided Learning Hours : 25
Unit Credit Value : 6
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: R/506/2179 : Build and maintain effective customer relations

Understand how to build effective relationships with customers

Assessment Criterion - The learner can:
01.01	Analyse stakeholder mapping techniques
01.02	Analyse the features of influencing techniques
01.03	Explain how influencing techniques can be used to improve the relationship with customers
01.04	Evaluate the benefits and value of relationships with customers and customer loyalty
01.05	Explain how techniques to manage expectations are applied to the management of customers
01.06	Explain different types of acceptable compromise
01.07	Evaluate the benefits of adopting a customer-centred approach

Be able to determine the scope for building effective relationships with customers
02.01	Identify the customers with whom relationships should be developed
02.02	Identify the interests and concerns of customers with whom relationships should be developed
02.03	Evaluate the scope for and limitations of building relationships with different types of customer

Be able to develop effective relationships with customers
03.01	Behave in a way that creates mutual trust and respect
03.02	Provide information and perform actions within agreed timescales
03.03	Take account of feedback provided by customers
03.04	Keep customers up to date with new products and/or services and developments
03.05	Assess regularly the extent to which customers expectations are met
03.06	Use personal influence and authority to ensure that customer needs are met or exceeded

Be able to review and improve relationships with customers
04.01	Monitor customer relationships and developments
04.02	Take action to ensure that others complete agreed actions within agreed timescales
04.03	Address changes to customer service methods that may have an effect on customer relationships
04.04	Collect feedback from customers on their levels of satisfaction
04.05	Recommend improvements to customer service based on analyses of the effectiveness of customer relationships

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

Unit: T/506/2126 : Communicate with customers in writing	
Understand how to communicate with customers in writing	
Assessment Criterion - The learner can:	
01.01	Explain why it is necessary to use different forms of written communication for different purposes
01.02	Describe practices for producing different forms of written communications
01.03	Describe the potential benefits and limitations associated with communicating with customers in writing
01.04	Explain the implications of confidentiality and data protection in communicating with customers in writing
Be able to plan written communications to customers	
02.01	Identify the objective(s) of the communication
02.02	Gather the information needed to draft the communication
02.03	Select the form of written communication that is most likely to lead to customer satisfaction within the service offer
Be able to communicate with customers in writing	
03.01	Produce communications that recognise customers points of view in accordance with organisational standards, styles and tone
03.02	Use language that is clear and concise, adapting it to meet identified customer needs
03.03	Record decisions and actions taken and the reasons for them
03.04	Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers in writing

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

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

Unit: T/506/2143 : Deliver customer service whilst working on customers premises
Understand how to deliver customer service whilst working on customers premises
Assessment Criterion - The learner can:
01.01	Describe the preparations that need to be made prior to a visit
01.02	Explain the importance of being positive about the product and/or service
01.03	Explain organisational standards of presentation, behaviour and communication
01.04	Explain the purpose of advising customers why work cannot be carried out that has not been previously agreed
01.05	Explain how to identify possible risks relating to the work to be carried out
01.06	Explain the way in which legislation affects the work to be carried out
Be able to deliver customer service whilst working on customers premises
02.01	Identify themselves to customers
02.02	Take action to ensure that customers know when, why and for how long work will be carried out on their premises
02.03	Confirm with customers the nature of work to be carried out on their premises
02.04	Keep customers informed of progress, delays, variations to work to be carried out and follow up needed
02.05	Treat customers, their premises and property with consideration
02.06	Confirm that the customer is satisfied with the outcome
02.07	Maintain their own personal safety and security and that of customers whilst on customers premises

Unit Specification
T/506/2160
Support customer service improvements

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

Unit: T/506/2160 : Support customer service improvements	
Understand how to support customer service improvements	
Assessment Criterion - The learner can:	
01.01	Describe different sources of information that may help identify ways of improving customer service
01.02	Describe the constraints on suggesting improvements to customer service
01.03	Explain the limits of their own authority in implementing improvements
Be able to identify the potential for improvements to customer service	
02.01	Use information from a range of sources to understand the customer experience
02.02	Identify potential areas where customer service could be improved from an analysis of information
02.03	Make recommendations for improvement that are based on evidence from analysed information
Be able to support the implementation of improvements to customer service	
03.01	Implement agreed improvements within the limits of their own authority
03.02	Inform customers of improvements to customer service
03.03	Identify the impact of improvements to customer service and feedback to relevant people

Unit Specification
Y/506/2135
Exceed customer expectations

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

Unit: Y/506/2135 : Exceed customer expectations	
Understand how to exceed customer expectations	
Assessment Criterion - The learner can:	
01.01	Explain how customers form expectations of the service they will receive
01.02	Explain legislation, organisational policies and procedures that can limit or vary the service offer
01.03	Explain the types of actions that customers are likely to perceive as adding value
01.04	Explain how to recognise when actions taken to offer added value could be built into the service offer
Be able to exceed customer expectations	
02.01	Identify differences between customers expectations and needs and the service offer
02.02	Explain the service offer clearly and concisely to customers
02.03	Identify options that offer added value without affecting other customers adversely
02.04	Make offers to customers within their own authority levels
02.05	Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
02.06	Record agreements made and actions taken

Unit Specification
Y/506/2149
Develop customer relationships

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

Unit: Y/506/2149 : Develop customer relationships	
Understand how to develop customer relationships	
Assessment Criterion - The learner can:	
01.01	Describe the importance of developing relationships with customers
01.02	Explain the value of customer loyalty and retention
01.03	Explain how customers expectations may change over time
01.04	Explain the use of customer feedback as a means of developing customer relationships
01.05	Explain the limits of their own authority to make alternative service offers to customers
01.06	Describe the use of Customer Relationship Management systems and processes to meet customers expectations
01.07	Explain the importance of regular communication in the development of both internal and external customer relationships
Be able to develop relationships with customers	
02.01	Give help and information that meets or exceeds customers expectations
02.02	Identify new ways of helping customers based on their feedback
02.03	Share feedback from customers with others
02.04	Identify added value that the organisation could offer customers
02.05	Bring to customers attention products or services that may interest them

Qualification Framework : RQF
Title : Develop resources to support consistency of customer service delivery
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 21
Unit Credit Value : 5
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: Y/506/2166 : Develop resources to support consistency of customer service delivery	
Understand how knowledge resources are used to support customer service delivery	
Assessment Criterion - The learner can:	
01.01	Explain the structure of a customer service knowledge base
01.02	Explain the uses of a customer service knowledge base
01.03	Explain the use of customers frequently asked questions to support customer service delivery
01.04	Explain the input and update routines for adding to the knowledge base
01.05	Explain the content requirements of resource materials and how they should be expressed
Be able to create and maintain a customer service knowledge base	
02.01	Identify the information that should be included in a customer service knowledge base
02.02	Confirm that a knowledge base is kept up to date
02.03	Promote the contents and use of a knowledge base
Be able to develop customer service resource materials	
03.01	Describe the types of questions frequently asked by customers
03.02	Identify the types of resources needed to support customer service delivery from an analysis of customer needs
03.03	Identify who will use the resources and in what way
03.04	Develop resources that meet organisational requirements
03.05	Communicate the availability and nature of the resources to those who will use them

Unit Specification
Y/506/2183
Manage the use of technology to improve customer service

Qualification Framework : RQF
Title : Manage the use of technology to improve customer service
Unit Level : Level 4
Unit Sub Level : None
Guided Learning Hours : 14
Unit Credit Value : 4
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: Y/506/2183 : Manage the use of technology to improve customer service	
Understand how to manage the use of technology to improve customer service	
Assessment Criterion - The learner can:	
01.01	Analyse developments in information and communication technology that relate to customer service
01.02	Analyse the features, functions and implications of technology for customer service delivery
01.03	Explain how to monitor the use of technology to improve customer service
Be able to identify opportunities for customer service improvement through the use of technology	
02.01	Review the effectiveness of customer service delivery against agreed criteria
02.02	Identify how customer service delivery could be improved by the introduction or adaptation of technology
02.03	Assess the costs of changes in the use of technology to improve customer service delivery
02.04	Make recommendations for changes in the use of technology through a costed business case
Be able to implement changes in technology to improve customer service	
03.01	Plan the implementation of changes in the use of technology in a way that minimises disruption to business
03.02	Update colleagues on the implementation and expected benefits of new technology
03.03	Provide staff with training in the use of new technology
03.04	Monitor the implementation of changes in the use of technology in line with the plan
03.05	Evaluate the effectiveness of changes in the use of technology against agreed evaluation criteria

Qualification Framework : RQF
Title : Manage team performance
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 21
Unit Credit Value : 4
SSAs : 15.3 Business Management
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: A/506/1821 : Manage team performance	
Understand the management of team performance	
Assessment Criterion - The learner can:	
01.01	Explain the use of benchmarks in managing performance
01.02	Explain a range of quality management techniques to manage team performance
01.03	Describe constraints on the ability to amend priorities and plans
Be able to allocate and assure the quality of work	
02.01	Identify the strengths, competences and expertise of team members
02.02	Allocate work on the basis of the strengths, competences and expertise of team members
02.03	Identify areas for improvement in team members performance outputs and standards
02.04	Amend priorities and plans to take account of changing circumstances
02.05	Recommend changes to systems and processes to improve the quality of work
Be able to manage communications within a team	
03.01	Explain to team members the lines of communication and authority levels
03.02	Communicate individual and team objectives, responsibilities and priorities
03.03	Use communication methods that are appropriate to the topics, audience and timescales
03.04	Provide support to team members when they need it
03.05	Agree with team members a process for providing feedback on work progress and any issues arising
03.06	Review the effectiveness of team communications and make improvements

Unit Specification
D/503/0397
Lead direct sales activities in a contact centre team

Qualification Framework :	RQF
Title :	Lead direct sales activities in a contact centre team
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	8
Unit Credit Value :	4
SSAs :	15.2 Administration
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: D/503/0397 : Lead direct sales activities in a contact centre team

Be able to carry out sales activities in a contact centre

Assessment Criterion - The learner can:

01.01	Prepare for a direct sales activity in accordance with organisational procedures
01.02	Establish customer wishes and needs
01.03	Offer options to customers by linking their wishes and needs to products and/or services
01.04	Adapt their sales style and techniques to mirror customer wishes and behaviour
01.05	Close the sale by agreement with the customer during the customer contact
01.06	Record the confirmed order in accordance with organisational procedures
01.07	Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre
01.08	Complete the authorisation or payment in accordance with organisational procedures

Be able to analyse contact centre sales data

02.01	Collate sales data from direct sales activities in a format that enables data manipulation
02.02	Analyse sales performance against market and customer trends
02.03	Summarise the results of the sales analysis to enable the formulation of a sales plan

Be able to lead a team involved in direct sales activities in a contact centre

03.01	Identify sales activities which are capable of fulfilling the sales plan
03.02	Agree realistic and achievable team sales targets including cross-selling and up-selling
03.03	Monitor the teams sales performance against agreed targets
03.04	Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach
03.05	Provide encouragement and guidance to team colleagues during sales activities

Understand sales activities in a contact centre team

04.01	Explain the features and benefits of the products and/or services offered or supported by the contact centre
04.02	Explain the organisational and regulatory requirements of direct sales activities
04.03	Explain the techniques for overcoming objections and questions from customers during sales activities
04.04	Explain the importance of adapting their style and approach to mirror customers style and perspective
04.05	Explain the importance of setting a good example in a contact centre team
04.06	Explain how to set sales targets including cross-selling and up-selling

Unit Specification
F/502/8612
Negotiating, handling objections and closing sales

Qualification Framework : RQF
Title : Negotiating, handling objections and closing sales
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 22
Unit Credit Value : 4
SSAs : 15.4 Marketing and Sales
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: F/502/8612 : Negotiating, handling objections and closing sales	
Understand how to handle objections and negotiate with the customer	
Assessment Criterion - The learner can:	
01.01	Describe the scope of authority and responsibility when dealing with objections
01.02	Identify the resources available to counter the sales objections
01.03	Describe how to plan and prepare for negotiation
01.04	Describe how to use testimonials to progress a sale
01.05	Explain the advantages and disadvantages of different methods of closing a sale
01.06	Explain organisational procedures for documenting the negotiated sale
Be able to prepare for objections and negotiation with the customer	
02.01	Identify possible sales objections and appropriate responses prior to dealing with the customer
02.02	Confirm authorisation to negotiate
02.03	Prepare a negotiation plan that is capable of providing a mutually acceptable outcome
Be able to handle objections	
03.01	Identify customer needs and wants in relation to objections by using a variety of questioning techniques
03.02	Identify and prioritise customers concerns
03.03	Provide evidence to the customer of the strengths of the organisations products or services
03.04	Confirm with the customer that the objection(s) have been overcome
03.05	Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals
Be able to negotiate with the customer	
04.01	Carry out negotiations according to negotiation plan
04.02	Promote the benefits of what is being offered to the customer
04.03	Explain to the customer when and why no further adjustment is possible
04.04	Obtain support to progress negotiation that is outside own level of authority
Be able to close the sale following negotiation	
05.01	Apply a trial close in accordance with the negotiation plan
05.02	Respond to any further objections and concerns
05.03	Identify and make use of potential add-on, up-selling or cross-selling opportunities
05.04	Summarise agreements made in accordance with organisational procedures and close the sale

Unit Specification
H/506/1814
Provide reception services

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

Unit: H/506/1814 : Provide reception services	
Understand reception services	
Assessment Criterion - The learner can:	
01.01	Explain the receptionists role in representing an organisation
01.02	Explain an organisations structure and lines of communication
01.03	Describe an organisations standards of presentation
01.04	Explain the health, safety and security implications of visitors to a building
01.05	Explain how to deal with challenging people
Be able to provide a reception service	
02.01	Welcome visitors in accordance with organisational standards
02.02	Direct visitors to the person they are visiting in accordance with organisational standards
02.03	Record visitors arrivals and departures in accordance with organisational procedures
02.04	Provide advice and accurate information within organisational guidelines on confidentiality
02.05	Keep the reception area tidy and materials up-to-date
02.06	Answer and deal with telephone calls within organisational standards
02.07	Adhere to organisational procedures on entry, security, health and safety

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

Unit: H/506/1912 : Negotiate in a business environment	
Understand the principles underpinning negotiation	
Assessment Criterion - The learner can:	
01.01	Describe the requirements of a negotiation strategy
01.02	Explain the use of different negotiation techniques
01.03	Explain how research on the other party can be used in negotiations
01.04	Explain how cultural differences might affect negotiations
Be able to prepare for business negotiations	
02.01	Identify the purpose, scope and objectives of the negotiation
02.02	Explain the scope of their own authority for negotiating
02.03	Prepare a negotiating strategy
02.04	Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
02.05	Assess the likely objectives and negotiation stances of the other party
02.06	Research the strengths and weaknesses of the other party
Be able to carry out business negotiations	
03.01	Carry out negotiations within responsibility limits in a way that optimises opportunities
03.02	Adapt the conduct of the negotiation in accordance with changing circumstances
03.03	Maintain accurate records of negotiations, outcomes and agreements made
03.04	Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Qualification Framework :	RQF
Title :	Bespoke Software
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	30
Unit Credit Value :	4
SSAs :	6.2 ICT for Users
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: J/502/4397 : Bespoke Software
Input and combine information using bespoke software
Assessment Criterion - The learner can:
01.01	Input relevant information accurately so that it is ready for processing
01.02	Select and use appropriate techniques to link and combine information within the application and across different software applications
Create and modify appropriate structures to organise and retrieve information efficiently
02.01	Evaluate the use of software functions to structure, layout and style information
02.02	Create, change and use appropriate structures and/or layouts to organise information efficiently
02.03	Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available
Exploit the functions of the software effectively to process and present information
03.01	Select and use appropriate tools and techniques to edit, analyse and format information
03.02	Check information meets needs, using IT tools and making corrections as necessary
03.03	Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
03.04	Select and use presentation methods to aid clarity and meaning

Qualification Framework : RQF
Title : Manage individuals' performance
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 20
Unit Credit Value : 4
SSAs : 15.3 Business Management
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: J/506/1921 : Manage individuals performance
Understand the management of underperformance in the workplace
Assessment Criterion - The learner can:
01.01	Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance
01.02	Explain how to identify causes of underperformance
01.03	Explain the purpose of making individuals aware of their underperformance clearly but sensitively
01.04	Explain how to address issues that hamper individuals' performance
01.05	Explain how to agree a course of action to address underperformance
Be able to manage individuals' performance in the workplace
02.01	Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
02.02	Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
02.03	Apply motivation techniques to maintain morale
02.04	Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards
02.05	Monitor individuals progress towards objectives in accordance with agreed plans
02.06	Recognise individuals' achievement of targets and quality standards
02.07	Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals performance in the workplace

Unit Specification
K/502/8622
Buyer behaviour in sales situations

Qualification Framework : RQF
Title : Buyer behaviour in sales situations
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 27
Unit Credit Value : 3
SSAs : 15.4 Marketing and Sales
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: K/502/8622 : Buyer behaviour in sales situations	
Understand the impact of different models of buyer behaviour on the sales cycle	
Assessment Criterion - The learner can:	
01.01	Explain the consumer buying decision-making process
01.02	Explain how the consumer buying decision-making process affects the sales cycle
01.03	Describe the influences that affect the consumer decision-making process
01.04	Explain the organisational buying decision-making process
01.05	Explain how the organisational buying decision-making process affects the sales cycle
01.06	Describe the influences that affect the organisational buying decision-making process
01.07	Explain the impact of the different roles within the decision-making unit on the sales cycle
Be able to respond to the buyer at each stage of the decision making process	
02.01	Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process
02.02	Respond to different decision-makers in a sales situation in a way that is appropriate to their role
02.03	Use objections as buying opportunities
02.04	Confirm solution(s) offered meet the needs and wants of decision-makers

Unit Specification
K/503/0418
Manage incidents referred to a contact centre

Qualification Framework : RQF
Title : Manage incidents referred to a contact centre
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 30
Unit Credit Value : 6
SSAs : 15.2 Administration
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: K/503/0418 : Manage incidents referred to a contact centre	
Be able to manage incidents through a contact centre	
Assessment Criterion - The learner can:	
01.01	Respond to incoming contacts relating to incidents in accordance with organisational procedures
01.02	Select resources that are available to deal with reported incidents
01.03	Inform the selected personnel of their responsibilities in accordance with organisational procedures
01.04	Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures
01.05	Monitor the management of the incident in accordance with organisational procedures
01.06	Ensure that the correct decision paths have been followed to manage reported incidents
01.07	Deal with queries and/or complaints about incident handling in accordance with organisational procedures
Be able to provide support to colleagues on incident management in a contact centre	
02.01	Agree with colleagues the areas in which they need support and guidance in incident management
02.02	Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs
02.03	identify actions to improve team performance in incident handling from a review of incident management results
Understand how to manage incidents reported to a contact centre	
03.01	Explain the incident management services offered by the contact centre
03.02	Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident
03.03	Explain the importance of clear communication using the most appropriate channel with those dealing with incidents
03.04	Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident
03.05	Describe the strengths and weaknesses of different types of support for colleagues
03.06	Explain the importance of reviewing incident management results

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

Unit: L/506/1807 : Manage diary systems	
Understand the management of diary systems	
Assessment Criterion - The learner can:	
01.01	Explain the importance of keeping diary systems up to date
01.02	Describe the basis on which bookings and changes are prioritised
01.03	Explain any constraints relating to making bookings for people or facilities
01.04	Describe the types of problems that can occur when managing diaries
Be able to manage diary systems	
02.01	Obtain the information needed to make diary entries
02.02	Make accurate and timely diary entries
02.03	Respond to changes in a way that balances and meets the needs of those involved
02.04	Communicate up-to-date information to everyone involved
02.05	Keep diaries up-to-date
02.06	Maintain the requirements of confidentiality

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

Unit: L/506/1869 : Contribute to the organisation of an event	
Understand event organisation	
Assessment Criterion - The learner can:	
01.01	Explain the roles, responsibilities and accountabilities of individuals involved in the event
01.02	Explain the purpose and features of different types of events
01.03	Describe the type of resources needed for different types of events
01.04	Describe the different needs attendees may have and how to meet these
01.05	Explain the requirements of health, safety and security when organising events
01.06	Describe the types of problems that may occur during events and how to deal with them
Be able to carry out pre-event actions	
02.01	Identify venue requirements for an event
02.02	Obtain resources within the agreed timescales
02.03	Distribute pre-event documentation to delegates in accordance with the event plan
02.04	Co-ordinate attendee responses within the agreed timescale
02.05	Identify any special requirements of event attendees
Be able to set up an event	
03.01	Set up layout and resources in accordance with the event plan
03.02	Confirm that all identified resources are in place and meet requirements
03.03	Behave in a way that maintains organisational values and standards
Be able to carry out post-event actions	
04.01	Ensure the venue is restored to the required conditions in accordance with the terms of the contract
04.02	Carry out follow-up actions in accordance with the event plan and agreements made at the event

Unit Specification
L/506/1905
Employee rights and responsibilities

iCQ

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

Unit: L/506/1905 : Employee rights and responsibilities
Understand the role of organisations and industries
Assessment Criterion - The learner can:
01.01	Explain the role of their own occupation within an organisation and industry
01.02	Describe career pathways within their organisation and industry
01.03	Identify sources of information and advice on an industry, occupation, training and career pathway
01.04	Describe an organisations principles of conduct and codes of practice
01.05	Explain issues of public concern that affect an organisation and industry
01.06	Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
Understand employers expectations and employees rights and obligations
02.01	Describe the employer and employee statutory rights and responsibilities that affect their own role
02.02	Describe an employers expectations for employees standards of personal presentation, punctuality and behaviour
02.03	Describe the procedures and documentation that protect relationships with employees
02.04	Identify sources of information and advice on employment rights and responsibilities

Unit Specification
M/502/8587
Processing sales orders

iCQ

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

Unit: M/502/8587 : Processing sales orders	
Understand how to process and follow up sales orders	
Assessment Criterion - The learner can:	
01.01	Explain the importance of sales order processing
01.02	Describe organisational processes for ordering products and/or services
01.03	Describe different sources of information used to check customer credit
01.04	Describe the different payment methods accepted by sales orientated organisations
01.05	Explain the role of the despatch function
01.06	Describe service standards relating to sales order completion
01.07	Explain the importance of storing information securely
Be able to process sales orders	
02.01	Identify customer sales order requirements
02.02	Check that the credit status of the customer meets organisational standards
02.03	Confirm the availability of products and/or services to the customer
02.04	Ensure that information given to the customer about delivery, timing and price is accurate
02.05	Ensure that the sale is authorised following the organisations procedures
02.06	Finalise the transaction in accordance with organisational procedures
02.07	Ensure that the customer is aware of the terms and conditions of sale
02.08	Ensure that the customers requirements are communicated to those responsible for fulfilling sales orders
02.09	Identify who to go to when in need of support with sales order processing problems
Be able to follow up sales order processing	
03.01	Keep the customer informed of the sales order progress and any problems with the sale order
03.02	Advise the customer of current discounts and special offers
03.03	Check all information is stored securely

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

Unit: M/506/1895 : Buddy a colleague to develop their skills	
Understand how to buddy a colleague	
Assessment Criterion - The learner can:	
01.01	Describe what is expected of a buddy
01.02	Explain techniques to give positive feedback and constructive criticism
01.03	Explain techniques to establish rapport with a buddy
Be able to plan to buddy a colleague	
02.01	Agree which aspects of a colleagues work may benefit from buddying
02.02	Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
02.03	Agree a schedule of meetings that minimise disruption to business
02.04	Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
Be able to support a buddy colleague carrying out work activities	
03.01	Remain unobtrusive while a buddy colleague carries out their work activities
03.02	Provide examples of how to carry out tasks correctly
03.03	Identify instances of good practice and areas for improvement through observation
03.04	Praise a buddy colleague on well completed tasks
03.05	Give constructive feedback on ways in which a buddy could improve performance
03.06	Offer a buddy hints and tips based on personal experience

Qualification Framework :	RQF
Title :	Collaborate with other departments
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	14
Unit Credit Value :	3
SSAs :	15.3 Business Management
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: M/506/1931 : Collaborate with other departments		
Understand how to collaborate with other departments		
Assessment Criterion - The learner can:		
01.01	Explain the need for collaborating with other departments	
01.02	Explain the nature of the interaction between their own team and other departments	
01.03	Explain the features of effective collaboration	
01.04	Explain the potential implications of ineffective collaboration with other departments	
01.05	Explain the factors relating to knowledge management that should be considered when collaborating with other departments	
Be able to identify opportunities for collaboration with other departments		
02.01	Analyse the advantages and disadvantages of collaborating with other departments	
02.02	Identify with which departments collaborative relationships should be built	
02.03	Identify the scope for and limitations of possible collaboration	
Be able to collaborate with other departments		
03.01	Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements	
03.02	Work with other departments in a way that contributes to the achievement of organisational objectives	

Unit Specification
R/502/8615
Obtaining and analysing sales-related information

Qualification Framework : RQF
Title : Obtaining and analysing sales-related information
Unit Level : Level 3
Unit Sub Level : None
Guided Learning Hours : 24
Unit Credit Value : 4
SSAs : 15.4 Marketing and Sales
Unit Grading Structure : Pass
Assessment Guidance : Please refer to the Online iCQ Assessment Guidance.

Unit: R/502/8615 : Obtaining and analysing sales-related information
Understand the uses of sales-related information
Assessment Criterion - The learner can:
01.01 Explain the importance of up-to-date information for sales planning purposes
01.02 Explain the benefits and risks of using a range of information sources to support sales activities
01.03 Explain the limitations of sales-related information
01.04 Explain the importance of reviewing sales data requirements for current and future use
Understand how to use tools and methods to analyse sales-related information
02.01 Explain the advantages and disadvantages of different systems to gather sales-related information
02.02 Explain how to use different software packages for analysing and presenting sales-related information
Be able to obtain sales-related information about customers, markets and competitors
03.01 Specify the information needed to develop an understanding of customers, competitors and markets
03.02 Identify sources that are capable of providing the required information about the organisations markets, customers and competitors
03.03 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation
Be able to use tools and methods to analyse sales-related information
04.01 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information
04.02 Define the information needs of the target audience for different types of sales-related information
04.03 Use the analytical protocols that are appropriate to the selected tools and methods
04.04 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information
04.05 Validate the reliability and validity of the findings of the analysis
04.06 Provide sales-related information to the target audience within the agreed timescale and budget

Unit Specification
T/506/1820
Promote equality, diversity and inclusion in the workplace

Qualification Framework :	RQF
Title :	Promote equality, diversity and inclusion in the workplace
Unit Level :	Level 3
Unit Sub Level :	None
Guided Learning Hours :	15
Unit Credit Value :	3
SSAs :	15.3 Business Management
Unit Grading Structure :	Pass
Assessment Guidance :	Please refer to the Online iCQ Assessment Guidance.

Unit: T/506/1820 : Promote equality, diversity and inclusion in the workplace
Understand the organisational aspects of equality, diversity and inclusion in the workplace
Assessment Criterion - The learner can:
01.01 Explain the difference between equality, diversity and inclusion
01.02 Explain the impact of equality, diversity and inclusion across aspects of organisational policy
01.03 Explain the potential consequences of breaches of equality legislation
01.04 Describe nominated responsibilities within an organisation for equality, diversity and inclusion
Understand the personal aspects of equality, diversity and inclusion in the workplace
02.01 Explain the different forms of discrimination and harassment
02.02 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
02.03 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
Be able to support equality, diversity and inclusion in the workplace
03.01 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace
03.02 Identify potential issues relating to equality, diversity and inclusion in the workplace
03.03 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace