



Unit Title: Remote Support for Products and Services

OCR unit number 37
 Level: 3
 Credit value: 12
 Guided learning hours: 100

Candidates undertaking this unit must complete real work activities in a work environment. Simulation is only allowed in exceptional circumstances (please refer to the centre handbook for further details).

Unit purpose and aim

To develop an understanding of the organisational procedures associated with customer care and the skills to support ICT products and services.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1. Understand the organisational requirements for customer care and the supported products and services</p>	<p>The Learner can:</p> <p>1.1 Describe the products and services to be supported including:</p> <ul style="list-style-type: none"> • benefits of the products and services; • frequently used product or service options; • advanced features, benefits and options of products and services; • how to identify alternative products or services to meet customers needs; • how the products or services interact with others commonly available; • where to obtain information on infrequently used product or service features or options; • the impact of introducing new products and services. <p>1.2 Describe the organisational requirements for customer care including:</p> <ul style="list-style-type: none"> • customer service procedures (e.g. how to 	<p>Candidates must have a detailed understanding of their organisation’s customer service offer.</p> <p>This must include a detailed understanding of the products and services that are supported and the key features and benefits for their customers.</p> <p>Candidates must have a detailed understanding of the organisational procedures associated with customer care</p>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>log customer information, how to initiate service calls, how to complete a sale);</p> <ul style="list-style-type: none"> • authorisation procedures (e.g. how to confirm caller identity, how to validate requests); • escalation resolution and complaint handling; • quality assurance procedures; • compliance with relevant legislation and regulations (e.g. data protection, financial services); • maintenance and communication of organisational brand or image; • organisational aims and objectives. 	
<p>2 Support products or services.</p>	<p>2.1 Comply with organisational requirements</p> <p>2.2 Confirm customer identity, validate requests and inform customers when authorisation criteria are not met</p> <p>2.3 Communicate information on specified products or services;</p> <ul style="list-style-type: none"> • identifying customers needs; • accurately collecting and logging relevant information from the customer; • providing product and service features to customers; • ensuring customer understanding of the information provided; • categorising requests and directing customers appropriately; • managing customer expectations (e.g. by confirming outcomes, timescales or costs); • discussing advantages 	<p>Candidates must have a detailed understanding of the organisational procedures for supporting products and services and be able to follow the procedures competently.</p> <p>They must be able to use appropriate communication techniques for providing information to customers and others and how to make recommendations within guidelines.</p>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>and disadvantages of complex products and services;</p> <ul style="list-style-type: none"> • discussing how the service product best fits the customers needs; • keeping customer informed on progress; • asking effective and appropriate probing questions. <p>2.4 Make recommendations based on customer needs.</p> <p>2.5 Resolve and escalate requests and handle basic complaints</p> <ul style="list-style-type: none"> • using probing questions; • displaying patience and understanding with demanding or emotional customers • diffusing volatile situations using appropriate communication techniques; • delivering difficult messages to customers and explaining the reasons behind the decision; • assessing priority of complaints; • resolving routine complaints. 	

Assessment

Candidates undertaking this unit must complete real work activities in order to produce evidence to demonstrate they are occupationally competent. Real work is where the candidate is engaged in activities that contribute to the aims of the organisation by whom they are employed, for example in paid employment or working in a voluntary capacity.

Simulation is only allowed for aspects of units when a candidate is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise. When simulation is used, assessors must be confident that the simulation replicates the workplace to such an extent that candidates will be able to fully transfer their occupational competence to the workplace and real situations.

Internal quality assurance personnel must agree the use of simulated activities before they take place and must sample all evidence produced through simulated activities.

It is the assessor's role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has finished a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future. Evidence of questions must include a written account of the question and the candidate's response. Observations and/or witness testimonies must be detailed and put the evidence into context ie the purpose of the work etc.

All of the assessment criteria in the unit must be achieved and clearly evidenced in the submitted work, which is externally assessed by OCR.

Evidence for the knowledge must be explicitly presented and not implied through other forms of evidence.

Evidence requirements

All aspects of the assessment criteria must be covered and evidence must be available that shows where and how the assessment criteria have been achieved.

Assessment Criterion 1

Candidates must provide a detailed report describing the following:

The full range of products and services which are supported by their organisation. The different products and services should have detailed descriptions and not just be a bullet pointed list. For each of the products and services, they must describe the features and benefits of the support and options available to their customers. They must identify which products and services that are frequently used and hot to identify the requirements of their customers. Candidates must also describe how they would obtain information on products and service s less frequently used and the impact of introducing new products/services.

The organisational procedures for dealing with customers including authorisation, escalation, quality assurance, legislation and regulation, organisational aims/objectives and organisational brand/image.

Assessment Criterion 2

Candidates must provide detailed evidence of following organisational procedures when supporting products and/or services for their organisation.

There must be evidence of:

- The purpose of the support
- Confirming authenticity of request for support
- Identify customer needs including logging customer information and using appropriate questioning techniques
- Providing information to customers
- Prioritising support needs
- Managing customer expectations
- Providing guidance to the customers in relation to identifying advantages/disadvantages of complex products/services, how the product/service will meet their needs, progress reports

Candidates must provide detailed evidence of:

- Making recommendations

- Resolving and escalating problems as appropriate, including their prioritisation
- Dealing with a range of customers including those who are demanding and/or emotional
- Use of appropriate communication techniques to diffuse volatile situations and deliver difficult messages

Candidates are encouraged to choose activities which will allow them to cover all or a majority of the criteria at one time. It is not necessary to use different activities for each element of the criterion.

Guidance on assessment and evidence requirements

Evidence can reflect how the candidate carried out the process or it can be the product of a candidate's work or a product relating to the candidate's competence.

For example: The process that the candidate carries out could be recorded in a detailed personal statement or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the unit.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through.
- candidate responses must be recorded

It is difficult to give a detailed answer to how much evidence is required as it depends on the type of evidence collected and the judgement of assessors. The main principles, however, are as follows: for a candidate to be judged competent in a unit, the evidence presented must satisfy:

- all the items listed, in the section 'Learning Outcomes'
- all the areas in the section 'Assessment Criteria'

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk .