Unit Title:	**Customer Care in ICT**
OCR unit number	15
Level:	2
Credit value:	9
Guided learning hours:	45
Unit reference number:	A/500/7158

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

Candidates will know how to provide customer care by establishing customer relationships using interpersonal communications techniques. Having completed this unit candidates will be able to provide service delivery following organisational guidelines and procedures.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills

The Learner will:
1 Know how to provide customer care by establishing customer relationships
	The Learner can:
	1.1 Describe the uses of interpersonal communication techniques such as:
	- verbal (e.g. intonation, tone and feedback (sometimes referred to as verbal attends)) and non-verbal techniques (e.g. smiling while talking on the phone, body language).
	- attentive listening (i.e. difference between hearing and listening).
	- positive and negative language.
	- active listening (e.g. summarising, paraphrasing, body language);
	- listening barriers (e.g. background noise, distractions, lack of concentration);
	- types of question (e.g. open, closed and probing).
	1.2 Describe the relevant parts of the organisational requirements for customer
		Candidates must have an understanding of:
		• different types of communication techniques (verbal and non-verbal) including how and when they are used
		• the difference between hearing and listening
		• the use of positive and negative language
		• what creates barriers to listening
		• the different types of questioning techniques eg open, closed, probing
		
		Candidates must have an understanding of:
		• the procedures used when dealing with customers to include:
		  - Logging of customer information
		  - Receiving calls
		  - Making calls
		  - Initiating discussions

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills

	care including;
	- customer service procedures (e.g. how to log customer information, how to initiate service calls, how to complete a sale);
	- 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
	1.3 Describe what the implications of customer satisfaction are
	- customer retention;
	- working relationships
	1.4 Describe the relevant methods of measuring customer satisfaction levels such as
	- predefined formal feedback
	- unsolicited feedback;
	- anecdotal feedback
		• the procedures to follow to confirm caller identity and validate customer requests
		• the procedures to be followed when dealing with customer complaints and problems including limits to own responsibility and the escalation process
		• the quality assurance procedures within the organisation
		• the regulations and legislation associated with their job role and dealing with customers eg:
		  - Data Protection Act
		  - Consumer Protection Act
		  - Health and Safety
		• the aims and objectives of their organisation in relation to customer service
		• the brand and/or image of the organisation and how to promote this image/brand
		
		Candidates must have an understanding of:
		• customer satisfaction and how it affects customer retention and working relationships
		• how customer expectations are formed and how this links to customer satisfaction
		
		Candidates must have an understanding of :
		• the importance of customer feedback
		• the different forms of customer feedback
		• how to analyse customer feedback to establish the level of customer satisfaction

2 Provide customer care by establishing customer relationships	2.1 Comply with organisational requirements 2.2 Communicate interpersonally on familiar subjects such as:	Candidates must have an understanding of: • the organisational requirements and

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	- following organisational guidelines and procedures - articulating and expressing ideas clearly and concisely - listening actively (e.g. by taking notes) - clarifying and confirming understanding (e.g. by paraphrasing or repetition). - responding to questions with accurate information - ensuring content is appropriate to the needs of the audience - identifying and avoiding listening barriers - maintaining focus on the purpose of the communication 2.3 Providing customer interaction such as; - focuses on addressing customer needs - interacts in a sensitive and helpful manner with the customer. - responds to customer requests on time, accurately, pleasantly and professionally - builds a trusting relationship with the customer - keeps self and customer focused - maintains consistent communication style 2.4 Provide service delivery such as; - recognising own limitations; - escalating customer issues following organisational requirements - meets own commitments to customers; - follows up customer problems and issues 2.5 Handle complaints from customers such as; - using probing questions; - displaying patience and understanding with	procedures when dealing with customers • the importance of good communication when dealing with customers including: - peaking clearly (when not to jargon) - actively listening - confirming understanding - providing accurate information - how to identify barriers to listening and how to avoid them Candidates must have an understanding of how to: • positively interact with a range of customers eg customers who are: - confused - angry - upset - knowledgeable - beginners with respect to ICT • how to build trust with customers • the importance of responding to customer requests Candidates must have an understanding of: • how to deal with customer complaints and enquiries including: - the limits of their responsibility - the procedures for escalation including who the escalate queries and complaints to - meeting commitments to customers and the procedures for following

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	demanding or emotional customers 2.6 Gather specified customer satisfaction information	up customer issues - the effective use of a range of questioning techniques - the importance of customer satisfaction and how to gather the evidence to support it

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 1.1

Candidates must describe:

- different communication techniques including verbal and non-verbal and how and when they are used

- different listening techniques and explain the difference between hearing and listening

- different questioning techniques and describe what they are and when they are used

- the difference between positive and negative language including spoken, written and body language
- the barriers to listening and how they can be addressed

Evidence should be in the form of a report.

Assessment Criterion 1.2

Candidates must describe the customer care procedures within their organisation including:

- logging customer information and the Data Protection Act
- making calls, receiving calls, initiating discussions
- security procedures for confirming customer identification
- the procedures they follow when dealing with customer complaints and/or problems
- the regulations and legislation they must adhere to

Candidates must describe:

- the quality procedures used within their organisation
- the image and/or brand associated with their organisation and how they communicate this eg personal presentation, use of specific documentation etc
- the aims and objectives of their organisation

Evidence should be in the form of a report or PowerPoint presentation with detailed speaker's notes.

Assessment Criterion 1.3

Candidates must describe:

- how customer expectations are formed and how this affects customer retention and working relationships

Evidence should be in the form of a report.

Assessment Criterion 1.4

Candidates must describe the following types of feedback:

- predefined formal feedback
- unsolicited feedback
- anecdotal feedback

and describe how it can be used to analyse customer satisfaction.

This can be in the form of a report or a PowerPoint presentation with speaker notes.

Assessment Criterion 2.1, 2.2, 2.3 and 2.4

This is about the candidate actually dealing with customers directly. There are various ways that this can be evidenced however there must be sufficient detail to meet all the requirements of the various assessment criteria.

Candidates could provide detailed reports of dealing with customers whilst meeting the requirements for the assessment criteria. These reports can be authenticated by expert witnesses from the workplace. The authentication from the expert witness should be more than just a signature. They should provide a short statement confirming how well the candidate carried out the tasks. Detailed assessor observations can also be used as evidence.

It is important that the evidence confirms that the candidate competently:

- complied with organisational requirements

- communicated with customers (providing examples from the assessment criteria list)

- provided customer interaction (providing examples from the assessment criteria list)

- provided service delivery to customers (providing examples from the assessment criteria list)

- handled complaints from customers (providing examples from the assessment criteria list)

- gathered specific customer satisfaction information

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.