

## **Vocational Qualifications (QCF, NVQ, NQF)**

### **Customer Service (NVQ)**

Level 1 NVQ Certificate in Customer Service **03454**

Level 2 NVQ Certificate in Customer Service **03455**

Level 3 NVQ Diploma in Customer Service **03456**

Level 4 NVQ Diploma Customer Service **10381**

### **Customer Service**

Level 1 Certificate in Customer Service **10378**

Level 2 Diploma in Customer Service **10379**

Level 3 Diploma in Customer Service **10380**

## **OCR Report to Centres: 2014 – 2015**

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It is also responsible for developing new specifications to meet national requirements and the needs of students and teachers. OCR is a not-for-profit organisation; any surplus made is invested back into the establishment to help towards the development of qualifications and support, which keep pace with the changing needs of today's society.

This report on the examination provides information on the performance of candidates, which it is hoped will be useful to teachers in their preparation of candidates for future examinations. It is intended to be constructive and informative and to promote better understanding of the specification content, of the operation of the scheme of assessment and of the application of assessment criteria.

Reports should be read in conjunction with the published question papers and mark schemes for the examination.

OCR will not enter into any discussion or correspondence in connection with this report.

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# Customer Service, Levels 1, 2, 3 & 4

## 1. Overview:

The most popular qualifications in the suite are at level 2 and level 3. This is due to the majority of centres using the qualification as part of the apprenticeship framework for customer service. The pan sector qualifications were launched in the autumn of 2014, which saw the combining of the competence and knowledge requirements into one qualification. Centres had become accustomed to the legacy qualifications and selecting units to meet the rules of combination at each level. Although centres are still required to ensure that rules of combination are adhered to in the pan sector qualifications, the structure has changed with an increase in the number of mandatory units. These mandatory units include units imported directly from the Business Administration and Management and Team Leading apprenticeship qualifications. As the technical certificate aspect is now embedded in the one qualification, centres have expressed the view that the qualifications are harder and require more evidence. It was therefore important that centres planned how they were going to deliver the knowledge aspect of the qualifications and use a range of relevant assessment methods to gather the evidence.

At this moment in time there have been few issues identified by centres or EQAs during the implementation of the apprenticeship qualifications.

## 2. General Comments

Centres were eager to have their DCS status transferred to the apprenticeship qualifications and therefore ensured that EQAs were provided with good evidence of the continuation of good assessment and IQA practice. This included work in progress evidence, minutes of standardisation meetings and CPD reflecting occupational competence for the imported units from Business Administration and Management and Leadership qualifications.

Overall, centres have confirmed that the new qualifications are more challenging but now reflect the industry and allow learners to develop their skills in a wider range of environments.

### Level 1 Customer Service

There has been a small number of learners who have successfully completed their level 1 qualification since its launch in the autumn of 2014. A large number of learners also successfully complete the legacy customer service certificate at level 1. The centres that have learners who have completed the new standards have demonstrated efficient transition from the legacy qualification. A wide range of valid assessment methods continues to be used such as observation, oral questions, witness testimonies and personal statements.

### Level 2 Customer Service

By the end of the academic year, a number of centres had learners who successfully completed the apprenticeship qualification. A large number of centres still has learners on apprenticeship programmes that are registered on the legacy qualifications with sufficient time available for certification to be finalised. Overall centres have made the transition between the two qualifications with little difficulty and continue to use a wide range of valid assessment methods such as observation, discussions, questioning, personal statements and case histories. Initially EQAs received a lot of queries in connection with unit 30 – Employee rights and responsibilities and whether they could adapt the workbooks they had already devised and used. Many centres have elected to use this unit as part of the framework requirements as opposed to learners completing a separate ERR component.

### **Level 3 Customer Service**

As to be expected there have only been two learners who have completed their level 3 apprenticeship qualification; the vast majority of learners are still on the legacy qualification with the separate technical certificate.

Centres have confirmed to EQAs that the imported Business Administration and Management and Leadership units for the mandatory group has increased the difficulty of the level 3 qualification and therefore more time is required to develop the learners skills, knowledge and understanding.

A wide range of effective assessment methods continues to be used by centres demonstrating a good overall understanding of the specification requirements.

### **Level 4 Customer Service**

Centres are very selective with respect to which learners they registered for the level 4 qualification. The qualification requires learners to be working in a senior role where they can influence decision-making and shape how customer service is delivered inside or outside of the organisation. It is good to see that centres have taken this on board and where possible allow learners following the level 3 qualification take relevant level 4 units instead. This is good practice by centres as it important that they do not assume that learners can automatically move up from one level to the next.

## **3. Comments on Individual Units**

### **Level 1 Customer Service (10378)**

#### **Unit 1 – Understand working in a customer service environment**

Centres are advised to refer to the additional guidance provided within the unit specification but ensure that when providing their own responses, learners do not merely copy the guidance provided but use their own words which may be aided with examples.

This is a knowledge unit and therefore it is expected that the learner would either present their evidence through responses to questions, a discussion with their assessor, personal statements and or case histories.

LO3, assessment criterion 3.5 refers to legislation and organisational requirements that affect what can be promised or carried out in a customer service role. It is therefore important that assessors ensure that learners research the most recent legislation pertinent to the customer service role and organisation that they are working in.

#### **Unit 14 – Contribute to sales activities in a contact centre**

As this unit is related to learners working in a contact centre, it is expected that the assessor will gather evidence by observing the learner and listen in to the call they make/answer. It is anticipated that in most cases the actual data will be confidential and therefore have to remain 'in situ' and not presented within the learner's portfolio. Assessors should ensure that they acknowledge the evidence and identify the location. Nonetheless, there need to be some reference to the fact that the learner had gathered specified information about customers, products and/or services in accordance with organisational procedures. (LO1, assessment criterion1.1). Whilst the detail of for example the customer cannot be included, an assessor or

witness could confirm that the learner followed the organisational procedures but gathering information on the customer such as name, address and telephone number.

## **Level 2 Customer Service (10379)**

### **Unit 3 – Principles of Customer Service**

This unit is one of the mandatory units in group A. LO2 includes some additional guidance and centres should note that when referring to legislation and regulations there is the term 'may include:'. Although there is a list of a number of legislation and regulations, which learners could use, these can change over time and it is important that Centre assessors do not use it as a definitive list. Learners should continue to research into the latest legislation and regulation pertinent to their organisation and their job role.

Some Centres have encouraged their learners to present their evidence by using their organisation and job role as examples throughout. This is good practice and enables the learners to put their evidence in context, which confirms a greater depth of understanding.

## **Level 3 Customer Service (10380)**

### **Unit 3 – Understand customers and customer retention**

Centres have confirmed that this unit was particularly challenging for their learners. Initially some learners were not providing the depth of responses required at level 3. This was noted by EQAs during the sampling of work in practice portfolios.

LO1 - this unit requires the learners to have a high level of knowledge and understanding of customers including the characterising and segmenting of them. They also need to have the opportunity to consider different CRM (customer relationship management) systems, their features and what makes them effective, what they can be used for.

LO2 – requires learners to demonstrate an understanding of customer retention. It is important that learners understand what this means, how it benefits an organisation. They could research their own organisation and explain what factors have influenced their customer retention and what techniques are used to attract or retain customers. Assessment criterion 2.5 requires learners to explain how to assess the **extent** of customer loyalty. Many learners were explaining how they would assess customer loyalty as opposed to the extent of the customers' loyalty. What does it take to retain their loyalty? Are they likely to use a different organisation if there is a price increase?

LO3 – overall this has been done well by learners who have completed the unit. They have been able to describe a range of techniques used to analyse customer satisfaction.

## **Level 4 Customer Service (10381)**

### **Unit 1 – Manage customer service operations**

This unit emphasises the planning and management of customer service operations to include the preparation of staff for delivery and the measurement of customer service performance.

LO1 – requires learners to have an understanding of the management of customer service operations. This is a very theoretical learning objective and requires the learners to assess monitoring methods customer service operations as well as analysing techniques and improvements to customer service operations. Learners should be encouraged to look at their own particular organisation and how customer operations are managed as well as researching

into other organisations that use different methods and techniques. This will assist them in the assessment and analysis.

LO2 – this is a more practical learning outcome, which requires the learner to plan customer service operations. There needs to be product evidence for Assessment criteria 2.2, 2.3, 2.4 and 2.5 which could be supported by a witness testimony from their manager and where relevant team. Assessment criterion 2.5 in particular could be observed by an assessor whilst the learner is holding a meeting with the team.

#### **4. Sector Update**

The Level 1 Customer Service Certificate (10378) is a combined qualification of knowledge and competence based units suitable for Traineeships. The new apprenticeship qualifications in Business Administration, Customer Service and Management and Leadership were launched in 2014. These qualifications at levels 2 and 3 combined the knowledge and competence components resulting in a single qualification. In order to achieve apprenticeship frameworks, learners must now be enrolled on the apprenticeship qualifications.

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