

Vocational Qualifications (QCF, NVQ, NQF)

Customer Service (NVQ)

Level 2 NVQ Certificate in Customer Service 03455

Customer Service

Level 2 Diploma in Customer Service 10379

Level 3 Diploma in Customer Service 10380

Moderators' report 2019 series

About this Moderators' report

This report on the 2019 series assessments aims to highlight:

- areas where students were more successful
- main areas where students may need additional support and some reflection
- points of advice 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.

The report also includes links and brief information on:

- A reminder of our **post-results services** including **reviews of results**
- Link to **grade boundaries**
- **Further support that you can expect from OCR**, such as our CPD programme.

Reviews of results

If any of your students' results are not as expected you may wish to consider one of our reviews of results services. For full information about the options available visit the [OCR website](#). If University places are at stake you may wish to consider priority service 2 reviews of marking which have an earlier deadline to ensure your reviews are processed in time for university applications: <http://www.ocr.org.uk/administration/stage-5-post-results-services/enquiries-about-results/service-2-priority-service-2-2a-2b/>

Grade boundaries

Grade boundaries for this, and all other assessments, can be found on the [OCR website](#).

Further support from OCR

CPD Training

Attend one of our popular CPD courses to hear exam feedback directly from a senior assessor or drop in to an online Q&A session.

Please find details for all our courses on the relevant subject page on our website.

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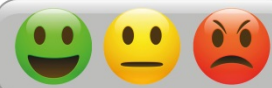
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Overview

Customer Service continues to be regarded as a defining factor; a means of differentiating professional organisations from their not so professional competitors. The potential for developing customer service as a USP is recognised by small, medium and large employers across all sectors and walks of life. As such, the uptake of these qualifications spans the whole of the population and they are used as the basis for employee training, development and recognition.

There are three qualifications in the Customer Service qualification suite as follows:

OCR Level 2 Certificate in Customer Service (scheme code 03455)

- Last registration date: 31/08/2020
- Last certification date: 31/08/2022

OCR Level 2 Diploma in Customer Service (scheme code 10379)

- Last registration date 31/08/2020
- Last certification date 31/08/2022

OCR Level 3 Diploma in Customer Service (scheme code 10380)

- Last registration date 31/08/2020
- Last certification date 31/08/2023

The Level 2 and Level 3 diplomas are from the legacy apprenticeship qualifications and combine a number of mandatory units which incorporated the old technical certificates. The CfA developed these qualifications as part of the 'pan-sector' suite of qualifications incorporating customer service, business administration, team leading and management. Therefore, within the qualification structure for customer service at Levels 2 and 3, there are business administration and team leading and management units. Some of which are mandatory within section A.

Centres who receive funding for apprenticeship programmes have moved to the trailblazer qualifications. They are, however, continuing to offer the customer service qualifications for candidates who are self-funded.

The centres who have delivered the customer service qualifications for a long time in their various guises continue to demonstrate good assessment practice across a range of units. The use of e-portfolios has continued to increase and overall the centres are maintaining the quality of their assessment and IQA practice. There have been some occasions where the feedback from assessors and IQAs have dropped to the bare minimum because the e-portfolio platform is being used. It is important that assessors and IQAs provide the same detailed feedback that would be provided within a paper-based portfolio. The vast majority of e-portfolio platforms allow centres to upload additional documents as part of the assessment and IQA process. If appropriate, assessors and IQAs should use these facilities to provide detailed feedback. Failure to provide feedback and confirm judgement decisions can result in a centre being levied a sanction.

Centres continue to embrace technology and implement digital recordings for professional discussions, Q&A sessions and obtaining witness testimonies. Some centres have used digital recorders to record their observations of the candidates. Centres are reminded that the recordings must be clear so that the OCR EQA can make verification judgements based on the evidence presented.

Candidates should not include policies and procedures and other such documentation as part of their evidence. They do not provide evidence of knowledge, skills or understanding. Candidates should be confirming that the requirements are for their job role and how they apply these policies and procedures.

It is also important that candidates do not include evidence of a sensitive nature, even if they attempt to block out the information. Assessors can confirm that the evidence is appropriate and signpost it to the workplace. In addition, candidates should not include copies of blank documents (unless they have created them and are using them to emphasise something that they have initiated). Blank documents do not provide evidence of competent performance, knowledge or understanding.

More assessors are using digital recorders to use as evidence for assessment activities such as questioning and discussions. These are very effective as a candidate is able to demonstrate the depth of their knowledge and understanding which does not always present itself fully within written reports and/or workbooks. Centres are reminded that it is important that the quality of the audio recording is of a good standard so that the OCR EQA can listen to them. It is also important that the recordings are not too long. Digital recordings should always be broken down into manageable sizes and there should always be documented evidence of the discussion with the candidate being planned in advance. This enables the candidates to prepare themselves for the discussion and collate any evidence they want to use to aid their discussions with the assessor.

General comments

OCR Level 2 Certificate in Customer Service (scheme code 03455)

OCR recognised that, in the main, the Customer Service qualifications were being very successfully delivered at Levels 2 and 3 whilst the uptake in relation to Levels 1 and 4 was minimal. For this reason registrations at Level 1 and 4 were closed and the last certification date has been confirmed as the 31st August 2019.

However, feedback suggests that the existing Level 2 and 3 qualifications remain fit for purpose and in order to support the continued demand an extension to the review date has been confirmed as 31st August 2020.

This decision has been received positively by centres – particularly by those who choose to deliver a quality assured qualification alongside an apprenticeship framework.

Many centres have created workbooks to address the requirements for the mandatory units in group A. Overall, these have enabled candidates to provide evidence of their knowledge and understanding within the context of their own working environment. Centres are reminded, however, that they must ensure that the workbooks encourage their candidates to meet the demands of the command verbs for the assessment criteria, especially with command verbs such as discuss. It has been noted that in some instances the workbooks are not encouraging the candidates to provide sufficient depth to their responses.

Assessors are continuing to consider a wider range of optional units which are more closely related to the candidates' working environment. This is good practice as it enables the candidates to provide evidence that is more robust enabling them to address criteria for knowledge and understanding more effectively.

It has been noted that there have been weaknesses with evidence for A9: Go the extra mile in customer service. Many of the examples presented by candidates do not reflect them 'going the extra mile' but carrying out their job role, although effectively, but under the normal requirements. Centres are reminded that going the extra mile requires evidence of the candidates going over and above the normal confines of their job role.

OCR Level 2 Diploma in Customer Service (scheme code 10379)

There are five mandatory units in section A for this qualification and whilst three of them are purely knowledge and understanding, Units 1 and 5 are a combination of knowledge, skills and understanding. Many centres have produced workbooks for candidates to use to provide evidence of their knowledge and understanding, but, the performance criteria for Units 1 and 5 must be performance evidence. Candidates should be presenting evidence of how they met the assessment criteria whilst carrying out their job role.

There has also been a steady increase in the number of centres using e-portfolios. On the whole the quality of the evidence and assessment/IQA practice has remained the same as with the paper-based portfolios. It has been noted that some centres are not ensuring that the assessor feedback to the candidate and the IQA feedback to the assessor is as detailed as they have provided in the paper-based portfolios. Centres are reminded that the quality of the written evidence for the assessment and IQA practice must provide sufficient detail as part of the assessment and quality assurance process.

Within the centre handbook, the rules of combination for the qualification is provided on pages 9-11. Due to the units being placed under a number of different sections, this has encouraged centres to consider a much wider variety of optional units for their candidates. The centres are continuing to select units with their candidates that reflect the job role being undertaken. This is good practice. Section B comprises of a choice of two units, Unit 6: Communicate verbally with customers and Unit 7: Communicate with customers in writing. Depending on the customer service job roles being considered, assessors continue to work with their candidates to identify which of the units are best suited to their roles.

Many centres select Unit 12: exceed customer expectations. Centres must ensure that their candidates understand how customer expectations are formed and whether they are in fact, realistic. This has not been a problem for many of the centres but has been noted as weak from a small minority of centres.

OCR Level 3 Diploma in Customer Service (scheme code 10380)

Many centres have also developed workbooks for the mandatory units within section A of the qualification. Some centres have ensured that candidates provide examples from their working environment when providing evidence of their knowledge and understanding. This has proved to be more effective with candidates providing some excellent examples of how they have delivered customer service along with the processes and procedures they have followed and the rationale behind the decisions they have made. Some centres encourage their candidates to produce reflective logs which have also provided some very good examples of how they dealt with customers, why they believed their actions were appropriate and effective including what they would do differently in a similar situation.

Units 1, 4 and 6 also require candidates to provide evidence of competent performance for their customer service role within their working environment. Centres who implement good assessment practice, encourage candidates to provide evidence through witness statements,

case studies, work products and professional discussions as well as taking the opportunity to conduct assessor observations. Centres should also consider where supporting evidence can be cross-referenced from other units.

Many centres are selecting a wider variety of units to address the diverse customer service roles of their candidates. This is good practice as it ensures that candidates provide evidence which is meaningful and robust.

There has also been a steady increase in the number of centres using e-portfolios. On the whole the quality of the evidence and assessment/IQA practice has remained the same as with the paper-based portfolios. It has been noted that some centres are not ensuring that the assessor feedback to the candidate and the IQA feedback to the assessor is as detailed as they have provided in the paper-based portfolios. Centres are reminded that the quality of the written evidence for the assessment and IQA practice must provide sufficient detail as part of the assessment and quality assurance process.

Comments on individual units

Delivery of these qualifications is now very well embedded within most centres. Assessment methods are clearly understood and, where appropriate, holistic links are being made between units. Centres are to be congratulated on the quality of their provision and the level of in-house standardisation activities which have ensured that learners receive consistent and fair support.

'Performance evidence' for the mandatory and optional units, learning outcomes and assessment criteria are being achieved by submission of valid, work based evidence. 'Knowledge' requirements are also being addressed by appropriate forms of evidence. 'Command verbs', and the breadth and depth of evidence that these imply, are well understood.

In recent months questions have been raised about the level 3 Diploma (10380). In particular there has been debate in some centres about whether learners need to have supervisory responsibilities in order to achieve this qualification. It can be confirmed that although this might make it easier to collect valid evidence for the likes of Learning Outcome 2 of Unit 1 (Organise and deliver customer service); it is not a requirement. Centres should, of course, bear in mind that NOT having supervisory or management responsibility would restrict the choice of optional units (such as Unit 31 Manage team performance, which would be impossible to achieve).

OCR Level 2 Certificate in Customer Service (scheme code 03455)

F1: Communicate using customer service language

This is a Level 1 unit but a mandatory component within section A of the Level 2 certificate. Wherever possible candidates' evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook.)

Candidates must provide evidence that shows they have carried this out over a sufficient period of time with different customers on different occasions. There have been occasions when evidence confirming one occasion has been presented. This is insufficient as it does not show that the sufficient period of time has been addressed, or the different customers and different occasions.

LO1: Identify customers and their characteristics and expectations

Candidates are required to recognise typical customers and their expectations, discuss customer expectations with colleagues and follow procedures in order to deliver effective customer service. Candidates should provide a selection of good work-based examples over a period of time. The examples should reflect the different customer types and the different occasions.

Candidates could provide evidence through a discussion with their assessor or present a report where they refer to these examples. For each example, they could describe the different types of customers and what their expectations are. This will then 'set the scene' for them to provide the evidence of how these customer expectations were discussed with colleagues and the processes they followed to achieve effective customer service. Evidence for 1.2 and 1.3 could be enhanced using assessor observation, witness testimonies and case studies.

LO2: Identify their organisation's services and products

The learning outcome requires candidates to outline their organisation's services and products to customers, greet customers politely and positively and list the information they need to deliver effective customer service and where it can be found.

Some of the evidence for this learning outcome could be linked to the evidence presented for LO1. With the examples already selected, candidates would have greeted the customers politely and positively and possibly would have outlined their organisation's services and products to their customers. If they have had to use information to assist the customer, they could then list the information and state where they found it.

LO3: Know how to communicate using customer service language

This learning outcome requires candidates to demonstrate their knowledge and understanding when communicating not only with the customers but also with colleagues who work alongside them. Customer service involves internal customers as well as external customers. Best practice would encourage candidates to use their previous examples from LO1 and LO2, by providing a narrative of 'what', 'when', 'where', 'how' and with 'whom'.

F2: Follow the rules to deliver customer service

This is a mandatory unit within section A of the Level 2 certificate. Wherever possible the evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook.)

As with F1, candidates must provide evidence that shows they have carried this out over a sufficient period of time with different customers on different occasions. In addition, the evidence requirements section of the unit specification stipulates that candidates must provide evidence of following the rules to deliver customer service as follows:

- during routine delivery of customer service
- during a busy time in their job
- during a quiet time in their job
- when people, systems or resources have let them down.

There have been occasions when candidates have not addressed the bullet list above which is a mandatory requirement for this unit. If these occasions are addressed effectively, it will also confirm the candidates' competence over time.

LO1: Follow their organisation's customer service practices and procedures

This is a practical unit as the assessment criteria uses the following command verbs: follow, recognise, refer, work. It is therefore a requirement for the candidates to present evidence of competent performance. A variety of assessment methods can be used such as assessor observations, witness testimonies, work products/documentation and case studies. Some of the evidence may be linked to the examples provided by the candidates for F1.

LO2: Know how to follow the rules to deliver customer service

This learning outcome requires candidates to present evidence of their knowledge and understanding. Some candidates, when presenting their evidence for LO1, have incorporated relevant knowledge criteria into them by explaining 'what', 'how' and 'why'. This is an example of good practice as it encourages the candidates to focus on their job role and the rules they have to follow.

A9: Go the extra mile in customer service

This is an optional unit within the Level 2 certificate in customer service. Candidates should be collecting evidence when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook.)

There must be evidence that the candidates have done this over a period of time with different customers for different occasions. The evidence requirements within the unit specification states that candidates' evidence must include:

- during routine delivery of customer service
- during a busy time in their job
- during a quiet time in their job
- when people, systems or resources have let them down.

It is important that candidates present evidence that not only includes the occasions as indicated in the bullet pointed list above, but also that they are 'going the extra mile' and not just carrying out their job role effectively. 'Going the extra mile' is when someone goes over and above the normal requirements of their job role.

LO1: Distinguish between routine service standards and going the extra mile

This emphasises the comment made earlier. The evidence for this unit must show that a candidate has gone over and above the routine service standards. This means more than just carrying out their role effectively within the expectations of the role. In order to achieve this, candidates must be able to explain clearly and concisely what the service offer is for their organisation. Whilst this particular learning outcome is more theory based, candidates should be encouraged to provide solid examples to aid their explanations. This allows them to provide the 'what', the 'why' and the 'how'.

LO2: Check that your extra mile ideas are feasible

Candidates can only go the extra mile within the confines of their own job role and/or with permission from relevant people within their organisation. This is a practical learning outcome and therefore there must be very clear evidence of the candidate checking the feasibility of their intended actions. There must be evidence of them explaining their ideas to senior colleagues or other appropriate authoritative personnel. This can take many forms and include minutes of meetings, written and/or documented communication between the interested parties as well as witness testimonies and assessor observations.

This learning outcome also requires candidates to provide evidence of matching and checking their ideas as per the assessment criteria. This evidence can be as part of an evidence where the candidate explains what and how they conducted the feasibility of their idea or as part of a discussion.

LO3: Go the extra mile

This learning outcome is not just about the candidate going the extra mile for their customers, but also monitoring the effects of their actions, noting and passing on positive feedback and suggesting if the extra mile action should become routine within the service offer. Evidence can include observations, witness testimonies and reports, discussions and documentary evidence such as minutes of meetings, reflective account etc.

LO4: Know how to go the extra mile in customer service

Many centres have effectively evidenced this learning outcome by encouraging candidates to incorporate the theory into their practical activities with statements such as 'I did..... because.....'.

Candidates need to know what their organisation's service offer is and how customers form expectations of the service they will receive. They need to be able to identify what types of actions will provide value added to the customer service offer. Candidates also need to show knowledge of their organisation's rules and procedures and the bounds of their own authority when delivering customer service. It is important that they can identify the relevant legislation and regulation and the impact this has on their potential to go the extra mile with a customer. They need to know how the organisation receives feedback from their customers and the procedures in place for making changes to the service offer.

OCR Level 2 Diploma in Customer Service (scheme code 10379)

Unit 1: Deliver customer service.

The title alone for this unit implies that there will be performance evidence required in order to fully satisfy the unit requirements. Some centres have encouraged candidates to provide evidence which is purely a level of knowledge and understanding and not encouraged the candidates to provide evidence of actual performance. Evidence of performance is a mandatory requirement for this unit.

LO1: Understand customer service delivery and **LO2: Understand the relationship between customer service and a brand** contain the underpinning knowledge and understanding that candidates must have in order to competently perform their customer service skills for the remaining learning outcomes in the unit. While the candidates could participate in a discussion with their assessor and/or answer questions, it is important that they include relevant examples which may also be used for LO3 and LO4. A more holistic approach across the learning outcomes provides much more effective evidence.

LO3: Be able to prepare to deal with customers

This involves the candidates ensuring that they keep up to date with their organisation's products and/or services and prepare any appropriate resources that they will need to use in order to deliver effective customer service. Candidates could be observed preparing for their interactions with the customers or use real work examples stating what they have done in order to prepare. This could also be confirmed via a suitable witness such as their supervisor or manager.

LO4: Be able to provide customer service

Candidates must provide evidence of how they comply with organisational policies, procedures and current legislation whilst dealing with customers and their needs and/or expectations. Suitable evidence can be obtained through assessor observations and/or well considered examples presented by the candidates from real work situations. As with LO3, these can be substantiated by suitable witnesses. LO4 follows on from their activities for LO3 and therefore the examples presented by the candidates should confirm the competent delivery of the customer service journey.

LO5: Be able to support improvements to customer service delivery

This learning outcome is about the candidate suggesting ideas to colleagues and/or service partners on how the delivery of customer service delivery. Note that assessment criterion 5.1 states 'identify ways...'. This means that there must be more than one way that they have identified how customer service could be improved. It is insufficient, therefore, for a candidate to only present one way. Forms of evidence would take the same format as LO3 and LO4.

Unit 5: Manage personal performance and development

All of the learning outcomes for this unit are with respect to performance evidence. Some centres use the Individual Training Plan; the effectiveness of the ITP depends on what level of detail is included and how, in particular, the activities reflect the management of personal performance and development within the candidate's customer service role.

LO1: Be able to manage personal performance

There must be evidence of the candidates agreeing SMART objectives in line with business needs with their line manager. Further evidence will then relate to the candidates following through with addressing and managing these SMART objectives which should include resolving any issues. Good organisational appraisals can support the evidence for this learning outcome. Some centres have encouraged candidates to produce a detailed personal development plan (PDP) and a reflective log where they reflect on progress, barriers and/or issues and how these were resolved.

LO2: Be able to manage their own time and workload

Some candidates use work diaries and/or workplans as supporting evidence, but these alone are insufficient. Candidates must provide evidence of minimising distractions that may occur. Professional discussions and/or candidate reflective logs could be used to provide examples of what the distractions were and how they were overcome. There is a knowledge assessment criterion within this learning outcome where candidates are required to explain the benefits of achieving an acceptable 'work-life balance'.

LO3: Be able to identify their own development needs

If candidates are encouraged to develop a detailed PDP for LO1, there is the likelihood that they will have also identified their own development needs. In addition, a good appraisal will include development needs, which the candidate would have agreed with the appraiser. It must be clear

within the evidence presented that the candidates has also identified their own development needs and not just been told what they are.

LO4: Be able to fulfil a personal development plan

A combination of a detailed PDP with evidence of following the plan and updating it and reflecting on progress is a good starting point for this learning outcome. In addition, an appraisal with the line manager will also provide a review of progress against the agreed SMART objectives and this would also provide appropriate evidence. Candidates who also include a reflective log invariably produce very strong evidence as they are constantly reviewing their progress and include useful information to support that they have followed their PDP.

Unit 12: Exceed customer expectations

This unit is not just about a candidate meeting their customers' expectations but actually exceeding them. It is important that candidates are able to establish what these customer expectations are and whether they can be met and exceeded.

LO1: Understand how to exceed customer expectations

This learning outcome reflects the underpinning knowledge and understanding that candidates require in order to deliver customer service where they exceed the expectations of the customers.

It is important that candidates are able to understand how their customers' expectations are formed. Using well considered examples can help a candidate express their understanding. Candidates must be able to show that they understand the difference between customer needs and customer expectations. A customer need is what the customer actually needs whilst their expectations are over and above their need.

LO2: Be able to exceed customer expectations

This learning outcome requires candidates to provide evidence of exceeding customer expectations and not just meeting the customers' needs. Evidence could be in the form of a professional discussion with the candidate providing examples through explaining the context, the customer needs, the customer expectations and then how they exceeded those expectations. Witness statements from appropriate personnel can also confirm how a candidate has exceeded customer expectations. Some assessors accept witness testimonies which merely states that a candidate has exceeded customer expectations. There should be more detail to the witness statement than this by the inclusion of examples. This should include 'what' the customer expectations were and 'how' they exceeded these expectations.

OCR Level 3 Diploma in Customer Service (scheme code 10380)

Unit 1: Organise and deliver customer service

LO1: Understand how to organise customer service delivery

Discussing with candidates, using suitable examples of how they have implemented the organising and delivery of customer service, will enable both parties to consider how the knowledge and understanding assessment criteria within this learning outcome can be addressed. This is more effective than asking the candidates to answer 'knowledge questions' as they are able to demonstrate their knowledge and understanding within a variety of contexts whilst addressing the remaining learning outcomes which are based on performance. Some centres have used observations, witness statements and professional discussions whilst asking candidates relevant questions such as 'what', 'why', 'how' and with 'whom'.

LO2: Be able to plan the delivery of customer service

The evidence for this learning outcome must come from examples where candidates have had to plan the delivery of customer service and include how they have planned to resolve situations where a customer's expectations have not been met, as well as dealing with increased workloads. The forms of evidence which are the most effective include assessor observations, witness statements, work products and professional discussions. There must be clear evidence of the candidates planning the delivery of customer service and not merely a case of the actual delivery itself.

LO3: Be able to deliver customer service

Ideally, the evidence should follow on from the examples used for LO2. In LO2, candidates have to plan the delivery and for LO3; they then deliver the customer service they planned. A range of situations should be included to demonstrate the candidates' competence for differing customer needs and expectations as well as the changing expectations of customers.

Unit 4: Resolve customers' problems

Depending on the examples selected for Unit 1, there is an opportunity to consider a holistic approach and use some if not all of the examples for this unit.

LO1: Understand the monitoring and resolution of customers' problems

As with Unit 1, learning outcome 1 is the knowledge and understanding required to underpin the effective dealing with and/or resolution of customers' problems.

Well considered examples selected for learning outcome 2 will enable the assessors to encourage the candidates to include they 'what', 'why', 'how' and with 'whom'. Assessors could ask these questions after observing a candidate's performance and/or during professional discussions. Work product evidence could also be used as supporting evidence. Witness testimonies can be used to confirm competent performance, but the candidates will still be required to provide evidence of their knowledge and understanding.

LO2: Be able to deal with customers' problems

The evidence for this learning outcome must be based on a candidate's actual activities when dealing with customers' problems. It is unlikely that one example would be sufficient as the assessment criteria within this learning outcome may not all be met from one example. In addition, candidates are always required to demonstrate competence over time. Therefore, a range of good examples would be required. It is perfectly acceptable for a candidate to deal with a customer's problem and have to escalate it to a higher authority in order for it to be fully resolved. This may happen in situations where a candidate has followed the organisational policies and procedures as far as their own job role permits, resulting in a customer wanting to complain. In these situations, a candidate would refer the problem to a higher authority whilst meeting the requirements for assessment criterion for 2.7 informing colleagues of the nature of the problems and the actions taken. It is important that assessors note the reference to the word problems within the wording of the assessment criterion. This indicates that more than one example is required.

Unit 9: Resolve customers' complaints

This unit provides the opportunity for assessors to consider a holistic approach as it has strong links with Unit 4. When resolving customers' problems, these can be as a result of complaints that customers have made. It is therefore possible, for the same examples to be used here as with Unit 4.

When using evidence for more than one unit, centres are reminded that the evidence must always be assessed against the assessment criteria for each unit.

LO1: Understand the monitoring and resolution of customers' complaints

As with Unit 4, effective evidence is always based on good examples of activities candidates have carried out whilst resolving the customers' complaints. As with the previous units, professional discussion, questioning by the assessor after an assessor observation or questioning the candidate based on the witness testimony they have presented, will provide good evidence of the knowledge and understanding involved. Using questioning techniques such as 'why', 'how', 'when' and with 'whom', will enable the candidate to provide appropriate knowledge and understanding within various contexts.

LO2: Be able to deal with customers' complaints

The best form of evidence is always an assessor's observation but depending on the situation, it is not always feasible. Therefore, witness testimonies, work products and professional discussions can be implemented effectively. Candidates can produce written reports detailing the situations and the processes and procedures they have followed and the outcomes. It is important that the assessors ensure that any written reports do provide sufficient detail to prove conclusively that each individual assessment criterion being claimed has been met.

Sector update

As mentioned above, customer service spans most sectors and continues to provide a versatile career pathway. But while the trailblazer qualifications are available at Level 2 and Level 3, some centres are stating that there is not a lot of take-up from businesses as in many instances, the businesses have used their levy money on in-house training. Small businesses are struggling to support the apprenticeship programmes due to a lack of money to provide for the levy. This has resulted in a reduction in apprenticeship numbers for customer service across the country. Centres have confirmed that the numbers have decreased radically.

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