

Customer Service

03455 OCR Level 2 NVQ in Customer Service

03456 OCR Level 3 NVQ in Customer Service

03457 OCR Level 4 NVQ in Customer Service

What is an NVQ?

An NVQ (National Vocational Qualification) is a qualification that assesses someone's competence (that is the skills, knowledge and understanding they have) within a work situation. NVQs are based on the national occupational standards that describe the level and breadth of performance expected of individuals whose work involves Customer Service practices. These NVQs are based on the national occupational standards developed by the Institute of Customer Service (ICS). They are the government approved body who set the standards for the Customer Service sector.

The awarding body for these NVQs is Oxford Cambridge and RSA Examinations (OCR) and the regulatory body is the Qualifications and Curriculum Authority (QCA).

These qualifications have been accepted by QCA for inclusion in the National Qualifications Framework (NQF).

Who are these NVQs for?

The OCR Level 2 NVQ in Customer Service is primarily aimed at candidates who undertake a customer service role and recognises that employment in the customer service sector involves a diverse range of functions, tasks and activities that are constantly developing and changing.

It is suitable for candidates:

- who have particular customer service and administrative job roles
- who are working in a customer service environment
- whose role is to provide service to customers.

The OCR Level 3 NVQ in Customer Service is aimed at candidates who will be delivering and managing service and will be accountable in the area of practice. Candidates will be working without direct supervisions or on their own, such as in a commercial customer service environment.

It is suitable for candidates who:

- can influence what happens at work
- uses the organisation's rules and systems flexibly to deliver good service
- question the way things are done and suggest improvements
- have good communication skills and a wide knowledge of what to do, who to see and where to go to get things done for the customer
- are aware of the commercial or other pressures facing the organisation/business.

The OCR Level 4 NVQ in Customer Service is aimed at the candidate working in a senior role within an organisation that treats customer service as a priority. The candidate does not have to be a line manager of other people or even have manager as part of the title; however they should hold a position that would allow them to influence decision making and shape how customer service is delivered inside or outside of the organisation.

It is suitable for candidates who:

- have a role that is clearly linked to customer service, for example, customer service managers, customer service team leaders or people who have significant responsibility for operations, staff and other resources
- who may have a general management type job that include some aspects of customer service
- are consultants or specialists who have responsibility for a particular aspect of the business which impacts directly on customer service, such as IT.

These NVQs are work-orientated qualifications and are suitable for those who have current real work experience. They are open to candidates of any age, of either gender and there are no entry barriers on grounds of race, creed or previous academic attainment or learning.

What is its purpose?

The objective of these qualifications is to reflect the work of candidates who undertake Customer Service activities at Levels 2, 3 or 4.

They provide a statement of competence that testifies to the ability of candidates to work to meet Customer objectives. They cover support systems, processes and services and recognise that employment in Customer Service involves a diverse range of functions, tasks and activities that are constantly developing in the light of changing customer needs.

These NVQs assess a candidate's competence against the national occupational standards for Customer Service at Levels 2, 3 and 4. Candidates must prove they are competent in a wide range of activities.

What are the benefits of these NVQs?

Employees will benefit from:

- A clearer understanding of their responsibility within their organisation
- The opportunity to develop new skills
- The recognition of existing skills.

Employers will benefit from:

- Improved staff performance and motivation
- Improvements in the quality of service to customers
- The opportunity to ensure levels of service are to national standard
- Improvements in the quality and service provided.

What are the structures of these NVQs?

To achieve a full **OCR Level 2 NVQ Certificate in Customer Service**, candidates must achieve 28 credits; 8 credits from the mandatory units and 20 credits from optional units. Candidates must select at least 1 unit from each optional group. A minimum of 11 credits from optional units must be at Level 2.

To achieve a full **OCR Level 3 Diploma NVQ in Customer Service**, candidates must achieve 42 credits; 12 credits from the mandatory units and 30 credits from optional units. Candidates must select at least 1 unit from each optional group. A minimum of 10 credits from the optional units must be achieved at level 3.

To achieve a full **OCR Level 4 NVQ Diploma in Customer Service**, candidates must achieve 67 credits; 20 credits from the mandatory units and 47 credits from optional units. Candidates must select at least 1 unit from each optional group. A minimum of 15 credits from the optional units must be achieved at Level 4.

NVQ units of competence

OCR Level 2 NVQ Certificate in Customer Service

Mandatory Units

- F1 Communicating using customer service language
- F2 Follow the rules to deliver customer service

Optional Units

Theme: *Impression and Image*

- A1 Maintain a positive and customer-friendly attitude
- A2 Adapt your behaviour to give a good customer service impression
- A3 Communicate effectively with customers
- A4 Give customers a positive impression of yourself and your organisation
- A5 Promote additional services or products to customers
- A6 Process information about customers
- A7 Live up to the customer service promise
- A8 Make customer service personal
- A9 Go the extra mile in customer service
- A10 Deal with customers face to face
- A11 Deal with incoming telephone calls from customers
- A12 Make telephone calls to customers
- A13 Deal with customers in writing or electronically
- A14 Use customer service as a competitive tool
- A15 Organise the promotion of additional services or products to customers
- A16 Build a customer service knowledge set

Theme: *Delivery*

- B1 Do your job in a customer-friendly way
- B2 Deliver reliable customer service
- B3 Deliver customer service on your customer's premises
- B4 Recognise diversity when delivering customer service
- B5 Deal with customers across a language divide
- B6 Use questioning techniques when delivering customer service
- B7 Deal with customers using bespoke software
- B8 Maintain customer service through effective hand over
- B9 Deliver customer service using service partnerships
- B10 Organise the delivery of reliable customer service
- B11 Improve the customer relationship

Theme: *Handling Problems*

- C1 Recognise and deal with customer queries, requests and problems
- C2 Take details of customer service problems
- C3 Resolve customer service problems
- C4 Deliver customer service to difficult customers
- C5 Monitor and solve customer service problems
- C6 Apply risk assessment to customer service
- C7 Process customer service complaints

Theme: *Development and Improvement*

- D1 Develop customer relationships
- D2 Support customer service improvements
- D3 Develop personal performance through delivering customer service
- D4 Support customers using on-line customer services
- D5 Buddy a colleague to develop their customer service skills
- D6 Develop your own customer service skills through self-study
- D7 Support customers using self-service technology
- D8 Work with others to improve customer service
- D9 Promote continuous improvement
- D10 Develop your own and others' customer service skills
- D11 Lead a team to improve customer service
- D12 Gather, analyse and interpret customer feedback
- D13 Monitor the quality of customer service transactions

OCR Level 3 NVQ Diploma in Customer Service

Mandatory Units

- F3 Demonstrate understanding of customer service
- F4 Demonstrate understanding of the rules that impact on improvements in customer service

Optional Units

Theme: *Impression and Image*

- A3 Communicate effectively with customers
- A4 Give customers a positive impression of yourself and your organisation
- A5 Promote additional services or products to customers
- A6 Process information about customers
- A7 Live up to the customer service promise
- A8 Make customer service personal
- A9 Go the extra mile in customer service
- A10 Deal with customers face to face
- A11 Deal with incoming telephone calls from customers
- A12 Make telephone calls to customers
- A13 Deal with customers in writing or electronically
- A14 Use customer service as a competitive tool
- A15 Organise the promotion of additional services or products to customers
- A16 Build a customer service knowledge set
- A17 Champion customer service
- A18 Make customer service environmentally friendly and sustainable

Theme: *Delivery*

- B2 Deliver reliable customer service
- B3 Deliver customer service on your customer's premises
- B4 Recognise diversity when delivering customer service
- B5 Deal with customers across a language divide
- B6 Use questioning techniques when delivering customer service
- B7 Deal with customers using bespoke software
- B8 Maintain customer service through effective hand over
- B9 Deliver customer service using service partnerships
- B10 Organise the delivery of reliable customer service
- B11 Improve the customer relationship
- B12 Maintain and develop a healthy and safe customer service environment
- B13 Plan, organise and control customer service operations
- B14 Review the quality of customer service
- B15 Build and maintain effective customer relations
- B16 Deliver seamless customer service with a team

Theme: *Handling Problems*

- C3 Resolve customer service problems
- C4 Deliver customer service to difficult customers
- C5 Monitor and solve customer service problems
- C6 Apply risk assessment to customer service
- C7 Process customer service complaints
- C8 Handle referred customer complaints

Theme: *Development and Improvement*

- D1 Develop customer relationships
- D2 Support customer service improvements
- D3 Develop personal performance through delivering customer service
- D4 Support customers using on-line customer services
- D5 Buddy a colleague to develop their customer service skills
- D6 Develop your own customer service skills through self-study
- D7 Support customers using self-service technology
- D8 Work with others to improve customer service
- D9 Promote continuous improvement
- D10 Develop your own and others' customer service skills
- D11 Lead a team to improve customer service
- D12 Gather, analyse and interpret customer feedback
- D13 Monitor the quality of customer service transactions
- D14 Implement quality improvements to customer service
- D15 Plan and organise the development of customer service staff
- D16 Develop a customer service strategy for a part of an organisation
- D17 Manage a customer service award programme
- D18 Apply technology or other resources to improve customer service
- D19 Review and re-engineer customer service processes
- D20 Manage customer service performance

OCR Level 4 NVQ Diploma in Customer Service

Mandatory Units

- F5 Demonstrate understanding of customer service management
- F6 Follow organisational rules, legislation and external regulation when managing customer service

Optional Units

Theme: *Impression and Image*

- A13 Deal with customers in writing or electronically
- A14 Use customer service as a competitive tool
- A15 Organise the promotion of additional services or products to customers
- A16 Build a customer service knowledge set
- A17 Champion customer service
- A18 Make customer service environmentally friendly and sustainable

Theme: *Delivery*

- B9 Deliver customer service using service partnerships
- B10 Organise the delivery of reliable customer service
- B11 Improve the customer relationship
- B12 Maintain and develop a healthy and safe customer service environment
- B13 Plan, organise and control customer service operations
- B14 Review the quality of customer service
- B15 Build and maintain effective customer relations
- B16 Deliver seamless customer service with a team

Theme: *Handling Problems*

- C5 Monitor and solve customer service problems
- C6 Apply risk assessment to customer service
- C7 Process customer service complaints
- C8 Handle referred customer complaints

Theme: *Development and Improvement*

- D8 Work with others to improve customer service
- D9 Promote continuous improvement
- D10 Develop your own and others' customer service skills
- D11 Lead a team to improve customer service
- D12 Gather, analyse and interpret customer feedback
- D13 Monitor the quality of customer service transactions
- D14 Implement quality improvements to customer service
- D15 Plan and organise the development of customer service staff
- D16 Develop a customer service strategy for a part of an organisation
- D17 Manage a customer service award programme
- D18 Apply technology or other resources to improve customer service
- D19 Review and re-engineer customer service processes
- D20 Manage customer service performance

Who is involved in the delivery of these NVQs?

Assessment centre

Any organisation, whether it is a place of employment, college or private training organisation can be approved to offer this qualification, as long as it meets the criteria set out in the OCR publication '*Administrative Guide to Verified Qualifications*' (reference code L526). This includes being able to provide suitably occupationally competent assessors and internal verifiers.

Once approved, an **assessment centre** will register candidates for the NVQ and allocate each candidate an **assessor** or **assessors**.

Trainer

The trainer will develop a candidate's knowledge, understanding and skills in relation to the NVQ that is being undertaken.

Trainers will:

- provide opportunities for learning
- provide ongoing mentoring to the candidate, including review and feedback on learning experiences and development of competence
- provide opportunities for a candidate to practice what they have learnt in a realistic, but safe and protected, working environment or, where this is not appropriate, in a simulated environment.

Assessor

The assessor will judge the evidence of a candidate's performance, knowledge and understanding against the units of competence in order to decide whether the candidate has demonstrated competence. The assessor will have suitable and reliable experience and be trained and qualified as an NVQ assessor. The criteria for appointing assessors are set out in the section **assessor and internal verifier requirements**. An assessor may be a candidate's line manager, a tutor at college, or someone specially appointed to this role. Assessments may also be carried out by a team of assessors.

The roles of trainer and assessor are inextricably linked and may be carried out by the same person, however, training activities must be clearly separated from assessment and only assessed evidence of competence should be presented as evidence towards the NVQ. The roles of assessor and trainer must be separate and preferably, where an individual has advised on a candidate's development they should not be that candidate's only assessor.

Internal verifier

Each assessor's work must be checked and confirmed by an **internal verifier** who is also a member of the staff of the assessment centre. The criteria for appointing internal verifiers are set out in the section **assessor and internal verifier requirements**. The internal verifier checks and standardises assessment decisions made by the assessors in the centre.

External verifier

The **external verifier** checks the assessment and internal verification decisions and processes made in the centre and authorises the claims for certificates. The external verifier is appointed by OCR.

How are these NVQs assessed?

Like all NVQs, these qualifications are competence-based. This means that they are linked to a person's ability to competently perform a range of tasks connected with their work.

To gain these NVQs a candidate must achieve the level of competence described in the NVQ units of competence. The units of competence contain the national occupational standards for Customer Service NVQs at Level 2, 3 and 4.

What are the important assessment requirements for these NVQs?

Simulation

Simulation is defined as any activities where dealing with customers and work activities are carried out through using individuals acting the part of the customer or scenarios which are not 'real' customer transactions. Only units C1 and C2 can be assessed via the use of simulated activities. The requirement and guidelines on this will be detailed in the centre handbook.

Assessor and Internal Verifier Requirements

The following criteria have been developed by the Institute of Customer Service and should be viewed as minimum requirements.

Occupational competence of Assessors, IVs and EVs at Level 2

The Assessor, IV and EV working at Level 2 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 2 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 2	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 2	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Occupational competence of Assessors, IVs and EVs at Level 3

The Assessor, IV and EV working at Level 3 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 3 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 3	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient, relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 3	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVs and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

Occupational competence of Assessors, IVs and EVs at Level 4

The Assessor, IV and EV working at Level 4 must have:		This can be evidenced by:	A	IV	EV
1.	A thorough understanding of the National Occupational Standards in Customer Service at Level 4 with the ability to interpret them within the environments and sectors they are working in	gathering feedback from a variety of centres			✓
		explaining and putting the National Occupational Standards into the contexts they are working in	✓	✓	✓
2.	Knowledge of current practice and emerging issues and changes in the VQ area across the UK	taking active participation in consultations and briefings with Awarding Organisations/Bodies ,UKCES, Accreditation Bodies and the ICS		✓	✓
		explaining the differences between the 4 UK Countries	✓	✓	✓
3.	Knowledge of current practice and emerging issues and changes in Customer Service across organisations and industries	gathering feedback from a variety of employers and centres			✓
		attending conferences or workshops where trends and developments in Customer Service are on the agenda	✓	✓	✓
		reading Customer Service publications and articles	✓	✓	✓
		regularly looking at the ICS Website for new developments	✓	✓	✓
		keeping up to date with media news regarding Customer Service	✓	✓	✓
		joining the ICS	✓	✓	✓
4.	Experience and working knowledge of the operational, assessment and verification processes specifically for Customer Service S/NVQ Level 4	having a successful track record of assessing or verifying the current Standards across a variety of organisations	✓	✓	✓
		achieving or be working towards the Level 2, 3 or 4 Customer Service S/NVQ	✓	✓	✓
5.	Sufficient relevant and credible Customer Service experience across the level and breadth of the Standards and S/NVQs at Level 4	gathering feedback from a variety of employers and centres	✓	✓	✓
		curriculum vitae and references/testimonies	✓	✓	✓
6.	Appropriate A and V Units according to their role – within 18 months of working with the Standards for Assessors and IVS and within 12 months for EVs. In Scotland all assessors and verifiers should provide evidence of CPD to show that they are working to the A and/or V unit standards where appropriate; those not yet qualified should show that they are working towards achieving the appropriate units.	producing certificates or evidence of working towards these units or by taking part in a Employer Direct Model in partnership with an Awarding Organisation/Body	✓	✓	✓
7.	Demonstrated high levels of communication and interpersonal skills	gathering feedback from candidates, employers or peers	✓	✓	✓

What to do next?

To seek approval to offer the qualification(s) please apply on-line following the step-by-step guide to applying for approval for vocational qualifications indicated on our 'Centre Approval' webpage.

Centres considering seeking approval to offer this qualification (or any other qualification we offer) might be interested to know that OCR staff are available to help with any aspect of setting up an assessment centre. Through an advisory telephone call or a centre visit we can assist, not only with the completion of the form, but also provide advice on the following areas:

- identifying potential candidates and marketing opportunities
- meeting OCR requirements
- identifying resourcing levels both in terms of staff and equipment
- the documents you might need for the benefit of the candidates and to ensure a smooth-running operation

For further information, please get in touch with our Customer Contact Centre by phone (024 7685 1509); email: vocational.qualifications@ocr.org.uk or in writing: OCR Customer Contact Centre, OCR, Westwood Way, Coventry, CV4 8JQ.

What other related OCR qualifications are available?

OCR offers a range of qualifications in Business, Management, Administration and Retail which are relevant to Customer Service NVQs. Please visit the OCR website: www.ocr.org.uk for details.

www.ocr.org.uk

OCR customer contact centre

Vocational qualifications

Telephone 024 76 851509

Facsimile 024 76 851633

Email vocational.qualifications@ocr.org.uk

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