

Customer Service Practitioner

Apprenticeship training manual

Name:

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Centre name:

Centre number:

Trainer:

Workplace mentor:

Date registered with City & Guilds:

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Welcome to the City & Guilds Apprenticeship Training Manual

Using this manual

This training manual is designed to help ensure that learners gain experience in each of the standards required of a Customer Service Practitioner, and it should be seen as a supporting resource. Use of the manual will aid employers and training providers in delivering the 20% off-the-job training requirement that is part of every apprenticeship programme, because the tasks can be completed away from the workplace.

The manual is not designed to be used for assessment, although completing the tasks correctly should, in many cases, produce evidence that might be used for independent end point assessment (for example, the Apprentice Showcase).

By design, the knowledge, behaviours and skills required of a Customer Service Practitioner should be demonstrated on the job as learners progress through their programme. Simply completing the tasks in this manual without appropriate context or application will not be sufficient to prepare learners for the end point assessment.

Suitable evidence

As learners work through both the manual and their programme they should be looking out for opportunities to collect workplace evidence for the Apprentice Showcase. Learners should be sure to keep suitable evidence in a safe place.

In some tasks examples of suitable evidence that will help demonstrate the achievement of the key outcomes are outlined in boxes like the one shown below. However, these are not meant to be exhaustive lists, and there might be other forms of evidence that learners can collect to support their achievements.

Distinction

As part of working towards distinction level, the Customer Service Practitioner standards require you to be able to explain how your organisational policies and procedures impact on the delivery of customer service.



Suitable evidence

Suitable evidence to support the achievement of these outcomes could include:

- witness statements
- written and/or digital communication
- coaching/observation
- mystery shop reports.



Distinction level

Some of the Tasks will help learners in working towards **distinction level**. These tasks will contain boxes like the ones above which will contain information on what a distinction-level learner will need to demonstrate. Tasks in which there are no boxes with the distinction symbol do not directly contribute to working towards distinction level.

Please note that completing these distinction-level tasks correctly does not guarantee that a learner is working at distinction level, but only serves to provide guidance on the level required. Learners will still need to sufficiently demonstrate the level at which they are working as part of the independent end point assessment.

Learner information

Throughout your programme and through use of this manual, you should be able to practise and improve your literacy and numeracy skills in a practical setting. When working on these tasks you will need to ensure that you complete all documentation as neatly and legibly as possible to support your development. You can do this either on paper or in an electronic format.

As you work through the tasks you should always be thinking about how the skills, knowledge and behaviours you are working towards relate to your own specific organisation, work and roles. Wherever possible you should give specific examples based on your own experiences. Throughout your programme you should also be looking to gather suitable evidence to support your learning for use in the Apprentice Showcase.

Throughout your programme and in doing these tasks you must remember to comply with health and safety workplace policies as well as data protection legislation.

Tasks can be completed more than once where necessary to support the development of practical skills and confidence.

Employer information

If employers recruit candidates without English and Mathematics at Functional Skills Level 2 (or equivalent) or above, they must ensure that the candidate sits this standard before they are submitted for the end assessment.

The period of learning, development and continuous assessment should be managed by the employer, in most cases with the support of a training provider. If there is a training provider, employers should work closely with them to plan and deliver support and training appropriately. This working closely will add value to the employer as it centres on real work competencies demonstrated in a real work environment.

Employers may wish to carry out joint reviews of a learner's progress in conjunction with the training providers at regular intervals. This could involve the learner, line managers and others with a direct relationship, eg mentors or workplace coaches. Everyone should agree together how any issues are to be resolved.

It is vital that employers support learners through the programme both by tracking their progression through the standards and by helping them collect evidence wherever possible. It is recommended that employers make use of their normal performance management processes to monitor the progress of the learner, provide feedback and guide development.

A lot of the knowledge, skills and behaviours required by the standards can only be demonstrated through practical application, so where possible employers should be looking for opportunities to help provide them with evidence such as witness testimonies, call recordings and detailed written feedback on how the learner is meeting key performance indicators (KPIs).

How the Customer Service Practitioner programme works

A brief guide to the Level 2 Customer Service Practitioner programme is outlined below.

Timeframes

The whole programme should be completed in **no less** than 12 months. In agreement with the learner, employer and training provider (if applicable), the learner may enter the Assessment Gateway at the earliest **after 12 months** on the programme.

Entry requirements

Learners are required to have or achieve Level 1 English and Mathematics (or relevant equivalent), and to have sat Level 2 English and Mathematics qualifications (or relevant equivalent) during or before completion of their apprenticeship.

Link to professional registration

Completion of this apprenticeship will mean that learners are eligible to join the Institute of Customer Service as an Individual member at Professional level.

Assessment method

The programme is assessed through a synoptic end point assessment which will take place at the end of the learner's development (after a **minimum of 12 months' on-programme learning**).

The employer and training provider (if appropriate) will formally sign off that the learner has met the minimum requirements for the knowledge, skills and behaviours listed in the standards and confirm they are ready to enter the Assessment Gateway, and be put forward for the end assessment. This should happen during a meeting involving the learner, their line manager and the trainer.

A breakdown of the assessment methods, their weightings and what they involve is shown in the table below:

Assessment method	Weighting	Duration and content description	Pass mark	Distinction
Apprentice Showcase	65%	The Apprentice Showcase enables learners to reflect and present examples of their development over the whole on-programme period. With guidance from the employer and/or training provider the learner will select appropriate evidence from the on-programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an Apprentice Showcase. This will attest to professional competence at the level.	100%	You must meet all of the pass criteria AND 70% of the distinction criteria
Practical Observation	20%	Minimum of 1 hour Pre-planned and scheduled to when the learner will be in their normal place of work, and carried out by the Independent End Point Assessor. The observation should enable the learner to evidence their skills, knowledge and behaviour from across the standard to demonstrate genuine and demanding work objectives. Each situation within the observation will be different, and examples include handling a general enquiry, or dealing with a customer complaint or a need for further information or detail. It is mandatory that the observation covers as a minimum presentation, equality, interpersonal skills, communication and personal organisation.	100%	You must meet all of the pass criteria AND 80% of the distinction criteria
Professional Discussion	15%	Maximum of 1 hour The purpose is to: <ul style="list-style-type: none"> ■ clarify any questions the Independent Assessor has from their assessment of the Apprentice Showcase and practical observation ■ confirm and validate judgements about the quality of work ■ explore aspects of the work, including how it was carried out, in more detail ■ discuss how the learner would behave in specific scenarios, should they not have occurred within the practical observation ■ ask questions in relation to personal development and reflection ■ provide a basis for the Independent Assessor to make a decision about the grade to be awarded. 	100%	You must meet all of the pass criteria AND 75% of the distinction criteria

If any part of the assessment is not sufficient when first submitted, there will be an opportunity for resubmission, and for the observation or professional discussion to be repeated. However, multiple assessment opportunities are not expected and all parties should be confident that the learner is ready to start the end point assessment, with practice runs taking place before formal assessment is completed. Should the learner fail any part of the end point assessment, further development must be provided prior to a re-take. If the learner re-sits with no additional learning, the individual employer will be responsible for bearing the cost.

Grading

Pass and distinction grades are applied at the end point assessment, with the final grade based on the performance in the Apprentice Showcase, the practical observation and a professional discussion.

- A **pass** candidate will competently perform their role, demonstrating application of the knowledge, skills and behaviours against the whole standard in line with organisation and regulatory requirements and ensuring customer satisfaction.
- A **distinction** candidate, in addition to meeting the pass criteria, will consistently perform above the required level for the role.

The final grade will be based on the final end assessment. The learner must achieve the minimum pass threshold in each of the end assessment components, and will be awarded a final grade based on the weighted average of the end assessment components:

Pass	All pass criteria achieved	100%
Distinction	All pass criteria achieved, plus ...	100%
	Apprentice Showcase	7/10 distinction criteria 70%
	Observation	4/5 distinction criteria 80%
	Professional Discussion	3/4 distinction criteria 75%

Customer Service Practitioner standards

For your reference, here is the full list of Customer Service Practitioner standards that you should be completing as part of your programme. You can see how these standards will be addressed through completing the tasks in this manual by looking at the mapping table on pages 16 and 17. Different standards will be assessed in different ways, as indicated by the colour-coding.

Key:

- = Assessed through Professional Discussion
- = Assessed through Apprentice Showcase
- = Assessed through Observation

Module	Standard	Coverage	Pass criteria	Distinction criteria
Knowing your customers	1. Understand who customers are	1.1 Who are my customers?	Explain the difference between internal and external customers in the context of the organisation.	Explain the importance of building good customer relationships to the organisation.
		1.2 Who are the organisation's customers?		
		1.3 Describe the different types of customers.		
		2.1 What is an internal customer?		
		2.2 What is an external customer?		
	2. Understand the difference between internal and external customers	2.3 Who are the organisation's internal customers?	Explain the difference in the way internal and external customer relationships are managed.	
		2.4 Who are the organisation's external customers?		
		2.5 What is the difference between internal and external customers to the organisation?		
		3.1 What is the purpose of customer service?		
		3.2 What are the different needs of your customers?		
	3. Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective	3.3 What are the different priorities of your customers?	Describe the specific needs of different customers, including those protected under current equality law.	Explain the importance of balancing the needs of both the organisation and its customers.
		3.4 Identify the specific needs that customers may have, including those that are protected under current equality law.		
		3.5 What is meant by customer expectations?		
		3.6 How does the standard of customer service affect the success of your organisation?		
		3.7 When do you adapt your service approach to meet the needs and expectations of your customers?		
3.8 How you adapt your service approach to meet the needs and expectations of your customers?	Explain when and how to adapt the service approach to meet the needs and expectations of customers.			

Module	Standard	Coverage	Pass criteria	Distinction criteria	
Understanding the organisation	1. Know the purpose of the business and what 'brand promise' means	1.1 What is the difference between public, private and third sector organisations?	State the aims of the organisation in relation to its sector.	Explain how the organisational policies and procedures impact on the delivery of customer service.	
		1.2 What is your organisation business type and purpose?	State what is meant by the organisation's 'brand promise'.		
		1.3 What does 'brand promise' mean?			
		2.1 What is meant by an organisation's core values?	Explain how the organisation's core values relate to its service culture.		
		2.2 What are your organisation's core values?			
	2. Know your organisation's core values and how they link to the service culture	2.3 What is meant by service culture?			
		2.4 What is your organisation's service culture?			
		2.5 How does your organisation's core values link to the service culture?			
		3.1 What is the purpose of an organisational policy?	State the purpose of different organisational policies and procedures that affect the customer service role.		
		3.2 List the organisational policies and procedures that could affect a customer service role.			
	3. Know the internal policies and procedures, including any complaints processes and digital media policies that are relevant to you and your organisation	3.3 What should be included in a complaints process/procedure?			
		3.4 What is meant by digital media?	Describe the type of guidelines in a digital media policy that affect the use of social and digital media in the work environment.		
3.5 What digital media policies exist in customer service organisations?					
1.1 Identify appropriate legislation and regulations and explain how they affect your organisation.		Explain how the relevant pieces of legislation and regulations affect the organisation's customer service provision.	Explain the potential impact on the organisation if it fails to adhere to each of the relevant pieces of legislation and regulations.		
2.1 Why is it important to keep information confidential within an organisation?		State responsibilities for keeping information confidential and within the organisation.	Explain how a code of practice or ethical standards affect customer service.		
Meeting regulations and legislation	2.2 What information needs to be kept and remain confidential within your organisation?				
	2.3 What are the responsibilities of the employee under the Health and Safety at Work Act?	State the responsibilities of employees and employers under the Health and Safety at Work Act.			
	2.4 What are the responsibilities of the employer under the Health and Safety at Work Act?				
	1.1 Know how to use systems, equipment and technology to meet the needs of your customers	1.1 What are the systems, equipment and/or technology your organisation uses to effectively meet customer needs? 1.2 In your role how would you use systems, equipment and/or technology to support customer needs?	Explain the use of the different systems, equipment and/or technology available in the organisation to meet customer needs effectively.		
Systems and resources	2. Understand types of measurement and evaluation tools available to monitor customer service levels	2.1 What are the types of measurement used to monitor customer service levels? 2.2 What are the types of evaluation tool used to monitor customer service levels?	Describe the measures and evaluation tools used in the organisation to monitor customer service levels.		

Module	Standard	Coverage	Pass criteria	Distinction criteria
Your role and responsibility	1. Understand your role and responsibilities within your organisation and the impact of your actions on others	1.1 What is your job role and responsibilities within that role? 1.2 How do your actions impact on others in your organisation?	Explain how the actions taken in the context of the job role and responsibilities impact on others in the organisation.	
	2. Know the targets and goals you need to deliver against	2.1 Identify the targets and goals for your role. 2.2 How do you achieve your targets and goals?	Describe how to achieve the agreed targets and goals.	
Customer experience	1. Understand how establishing the facts enable you to create a customer focused experience and appropriate response	1.1 What is meant by a customer focused experience? 1.2 How do you establish the facts to create a customer focused experience? 1.3 How do you use the facts create an appropriate response?	Explain how an understanding of the facts can be used to create a customer focused experience.	Explain how to respond to customer needs and requirements positively.
	2. Understand how to build trust with a customer and why this is important	2.1 Why is building customer trust important? 2.2 How would you start to build trust with your customers?	Explain how to build trust with customers and the importance of doing so.	
	1. Understand the products or services that are available from your organisation, and keep up to date	1.1 What are your organisation's products and/or services? 1.2 What is the difference between providing a product and providing a service? 1.3 How do you update and maintain your knowledge of your organisation's products and/or services?	Explain the difference between the features and benefits of products and/or services in relation to the organisation. Describe how to maintain knowledge of the organisation's products and/or services.	Explain why it is important to update knowledge on the organisation's products and/or services.
Interpersonal skills	1. Use a range of questioning skills, including listening and responding in a way that builds rapport, determines customer needs and expectations and achieves positive engagement and delivery.	1.1 Demonstrate effective interpersonal skills that achieve positive customer engagement using: - effective use of open and closed questioning skills relevant to the situation - effective use of active listening skills when communicating - effective use of body language when interacting with customers - working with others and sharing good practice when performing duties	Demonstrate willingness and ability to engage with customers in a positive manner using relevant interpersonal skills.	Demonstrate ability to adapt interpersonal skills when working on meeting the needs and expectations of different customers, showing knowledge of the application of the Equality Act when communicating (verbally or non-verbally).
		1.2 Recognise customer needs and expectations.	Work with customers to build a rapport, recognising and where possible meeting their needs and expectations.	Demonstrate ability to balance the needs and expectations of the customer with that of the organisation.
		1.3 Respond to customer needs and manage expectations in a professional and timely manner.	Show willingness to work with others and share ideas where appropriate.	Proactively work with others to ensure efficient customer service delivery.
		1.4 Build and maintain a rapport with customers.		

Module	Standard	Coverage	Pass criteria	Distinction criteria
Communication	1. Depending on your job role and work environment: - use appropriate verbal and non-verbal communication skills, along with summarising language during face-to-face communications; and/or - use appropriate communication skills, along with reinforcement techniques (to confirm understanding) during non-facing customer interactions. Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand.	1.1 Use appropriate methods of verbal and non-verbal communication skills relevant to your work environment.	Face-to-face – demonstrate ability to make initial customer contact and use appropriate verbal and non-verbal communication skills.	In all roles, demonstrate ability to adapt communication – tone, behaviour and language – to different customers and their interactions, showing clear knowledge of the application of the Equality Act in all customer handling.
		1.2 Use appropriate body language to maintain or enhance the customer experience.	Adapt tone, behaviour and body language when necessary, recognising and confirming understanding of needs and expectations.	
		1.3 Adapt tone and/or behaviour to maintain or enhance the customer experience as appropriate.	Demonstrate ability to recognise when to summarise, and the techniques to use.	
		1.4 Confirm your, and the customer's, understanding of the customer's needs and expectations.	Non-facing – demonstrate ability to make initial customer contact and make use of appropriate communication skills.	In all roles, demonstrate ability to flex to various customer personalities, while remaining calm and in control where necessary. Demonstrate knowledge of the organisational procedures to be followed in all communication and the importance to the brand/organisation of this requirement.
		1.5 Use summarising language and/or reinforcement techniques during customer interaction to confirm understanding.	Adapt tone and behaviour when necessary, recognising and confirming understanding of needs and expectations.	
		1.6 Use correct, appropriate and clear communication skills, eg written and verbal, that reflect your organisation's brand.	Demonstrate ability to recognise and use reinforcement techniques during customer interactions.	
Influencing skills	1. Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation	1.1 Identify customer needs.	Offer appropriate product and/or service options to meet the identified needs of customers and the needs of the organisation.	Provide appropriate explanations to customers in situations where a mutually beneficial outcome cannot be reached.
		1.2 Offer product and/or service options to customers in a logical and reasoned manner.	Communicate to customers in a clear and coherent manner how the products and/or services offered meet their needs.	
		1.3 Clearly explain how options offered meet the customers' needs.	Handle customer objections in a positive and professional manner.	
		1.4 Handle customer objections in a positive and professional manner.	Prioritise and plan the completion of tasks according to agreed deadlines.	Respond in a professional manner to challenges and changes and adjust priorities accordingly.
Personal organisation	1. Be able to organise yourself, and prioritise your own workload/activity and work to meet deadlines	1.1 Agree goals and deadlines for completing tasks with an appropriate person.		
		1.2 Prioritise and plan the completion of tasks to meet delivery deadlines.		
		1.3 Use tools and techniques to monitor progress of tasks.	Use appropriate tools and techniques to monitor the progress of tasks' completion.	
		1.4 Monitor and adjust priorities as required.		
		1.5 Meet agreed deadlines.		

Module	Standard	Coverage	Pass criteria	Distinction criteria	
Dealing with customer conflict and challenge	1. Demonstrate patience and calmness	1.1 Show patience, calmness and empathy when dealing with challenging customer situations. 1.2 Use active listening skills when communicating with customers. 1.3 Use appropriate questioning skills.	Maintain calm and patience at all times when dealing with challenging customer situations.	Take ownership of customer issues, taking the appropriate actions to ensure customers' needs and expectations are met.	
	2. Show you understand the customer's point of view	2.1 Show understanding of the customer viewpoint.	Demonstrate sensitivity to, and interest in, the customers' concerns.		
	3. Use appropriate signposting or resolution to meet your customers' needs and manage expectations	3.1 Explain the next steps and/or customer options in a logical manner.	3.2 Provide clear signposting or resolution to meet customers' needs and manage customer expectations.	Communicate in a clear and coherent manner the next steps and/or options to meet the needs and expectations of customers.	
		3.3 Deal with customer conflict or challenge presented in line with organisational and/or policies procedure.	3.4 Resolve customer conflict or challenge presented in line with organisational policies and/or procedures.	Resolve customer conflicts and/or challenges in line with the relevant organisational policies and/or procedures.	
4. Maintain informative communication during service recovery		4.1 Keep customers informed of progress while resolving issues. 4.2 Maintain accurate record of customer issues and progress to resolution.	Keep customers informed of progress while resolving issues. Maintain accurate record of customer issues and progress to resolution.		
Developing self	1. Take ownership for keeping your service knowledge and skills up to date	1.1 Identify your strengths and weaknesses in relation to working within a customer service role. 1.2 Apply the techniques of self-assessment to look at strengths and weaknesses.	Conduct a self-assessment to identify strengths and weaknesses in relation to the job role.	Review the effectiveness of the Personal Development Plan and update it accordingly.	
	2. Consider personal goals and propose development that would help you achieve them	2.1 Prepare a Personal Development Plan that helps to achieve personal goals and development needs. 2.2 Review and update your Personal Development Plan.	Produce a Personal Development Plan to support the achievement of agreed learning and development goals.		

Module	Standard	Coverage	Pass criteria	Distinction criteria
Being open to feedback	1. Act on and seek feedback from others to develop or maintain personal service skills and knowledge	1.1 Identify suitable ways of obtaining informal and formal feedback from others.	Seek constructive feedback about customer service skills and knowledge from others.	
		1.2 Obtain useful and constructive feedback about your own service skills and knowledge from others. 1.3 Positively respond to all feedback. 1.4 Use the feedback received to take responsibility for maintaining and developing your personal customer service skills and knowledge.	Use feedback from others to develop customer service skills and knowledge.	
Team working	1. Frequently and consistently communicate and work with others in the interest of helping customers efficiently	1.1 Demonstrate the interpersonal skills required to work effectively as part of a team.	Work with others in a positive and productive manner.	Recognise when to adapt personal behaviours and communication approach to meet the needs of team members and customers.
		1.2 Communicate consistently with team members in the interest of helping customers.	Communicate information in a timely and reliable manner to team members to support them in meeting customer needs efficiently.	
		1.3 Demonstrate cooperation when working with others.		
Equality – treating all customers as individuals	2. Share personal learning and case studies with others, presenting recommendations and improvement to support good practice	2.1 Share personal learning with others to support good practice.	Share personal learning and information with others to support good customer service practice.	Present reasoned ideas for improving customer service practice to the appropriate colleagues.
		2.2 Present your ideas and recommendations for improvements in customer service to others.		
		1.1 Treat all customers equally, ensuring that you comply with legal requirements. 1.2 Recognise and respond to individual needs to provide a personalised customer service experience.	Recognise and respond to individual needs to provide a personalised customer service experience.	
Presentation – dress code, professional language	2. Uphold the organisation's core values and service culture through your actions	2.1 Act in a way that upholds the core values and service culture of the organisation.	Behave in a way that upholds the core values and service culture of the organisation.	
		1.1 Demonstrate professional pride in the job through appropriate dress and positive and confident language	Present a professional image in line with the organisational dress code and code of conduct.	
		1.2 Know and follow organisational dress code. 1.3 Be approachable and welcoming when dealing with customers face-to-face OR 1.4 Use a welcoming and approachable tone when in non face-to-face situations. 1.5 Present a positive attitude with all customers and in various situations. 1.6 Maintain professional and positive language in all situations. 1.7 Be confident and calm in difficult situations.	Demonstrate a positive attitude and welcoming approach consistently when dealing with customers.	Maintain professional and positive language consistently in customer interactions.

Module	Standard	Coverage	Pass criteria	Distinction criteria
'Right first time'	1. Use communication behaviours that establish clearly what each customer requires, and manage their expectations	<p>1.1 Make initial approaches to customers in a professional manner, following organisational procedures.</p> <p>1.2 Establish customer needs from customer wants.</p> <p>1.3 Work towards meeting customer needs.</p> <p>1.4 Adapt tone and behaviour to meet customer needs and expectations.</p> <p>1.5 Recognise customer expectations.</p> <p>1.6 Manage customer expectations.</p> <p>1.7 Check customer satisfaction.</p> <p>1.8 Remain positive and professional when explaining when customer needs and/or expectations cannot be met.</p>	<p>Demonstrate ability to confidently approach customers, remaining positive and professional when circumstances are challenging.</p> <p>Show an ability to establish needs and expectations, working towards meeting them where possible, explaining when necessary when they cannot be met.</p> <p>Demonstrate knowledge of the organisational products and/or services and knowledge and application of the organisation's policies and procedures.</p>	
	2. Take ownership from the first contact and then take responsibility for fulfilling your promise	<p>2.1 Establish initial contact with customers.</p> <p>2.2 Recognise customer wants, needs and expectations.</p> <p>2.3 Take responsibility and work with customers to achieve an outcome.</p> <p>2.4 Maintain contact with customers where necessary and as promised (even if no additional information is available).</p> <p>2.5 Refer customers to others as required, accurately passing on necessary information.</p> <p>2.6 Follow up as required to ensure an outcome is reached.</p> <p>2.7 Following organisational procedures, check customer satisfaction.</p>	<p>Demonstrate recognition of own role, responsibilities, level of authority and organisational procedures when dealing with customers.</p> <p>Take ownership from beginning to end, building and maintaining a relationship with the customer.</p> <p>Recognise the importance of good customer service to the customer and in turn the organisation, making contact as promised, referring to others as necessary with all required detail, following up to ensure conclusion.</p>	

How the standards map to the tasks

Modules	Tasks				
	Induction part 1 – understanding organisation types	Induction part 2 – understanding customer expectations	Creating a Personal Development Plan	Presenting a professional image	Using feedback from colleagues
Knowing your customers	-	1.1–1.3, 2.1–2.5, 3.1–3.8	-	-	-
Understanding the organisation	1.1–1.3, 2.1–2.5, 3.1–3.3	-	-	-	-
Meeting regulations and legislation	-	-	-	-	-
Systems and resources	-	-	-	-	-
Your role and responsibility	-	-	1.1, 1.2, 2.1–2.3	-	-
Customer experience	-	-	-	-	-
Product and service knowledge	-	-	-	-	-
Interpersonal skills	-	-	-	-	-
Communication	-	-	-	-	-
Influencing skills	-	-	-	-	-
Personal organisation	-	-	-	-	-
Dealing with customer conflict and challenge	-	-	-	-	-
Developing self	-	-	1.1, 1.2, 2.1, 2.2	-	2.2
Being open to feedback	-	-	-	-	1.1–1.4
Team working	-	-	-	-	-
Equality – treating all customers as individuals	-	-	-	-	-
Presentation – dress code, professional language	-	-	-	1.1–1.7	-
‘Right first time’	-	-	-	-	-

Organising, prioritising and monitoring your workload	Using organisational systems and resources	Meeting legislation and regulations	Treating all customers with equality and as individuals	Interacting effectively with customers	Providing a customer-focused experience	Knowing your products and services	Using digital media	Improving your customer service offer	Dealing with conflict
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	3.4, 3.5	-	-
-	-	1.1, 2.1-2.4	-	-	-	-	-	-	-
-	1.1, 1.2, 2.1, 2.2	-	-	-	-	-	-	-	-
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-	-	-	-	1.1-1.6	-	-	-	-	-
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1.1-1.5	-	-	-	-	-	-	-	-	-
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-	-	-	1.1, 1.2, 2.1	-	-	-	-	-	-
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-	-	-	-	1.1-1.4, 2.1, 2.2	-	1.5-1.8	-	-	2.3-2.7

Task progress checklist

You can use this checklist to tick off each task as you complete it so you can see how you are progressing through the manual.

Task list	Completion date	✓
Reflective practice – making the most of your learning		<input type="radio"/>
Task 1: Induction part one – Understanding organisation types		<input type="radio"/>
Task 2: Induction part two – Understanding customer expectations		<input type="radio"/>
Task 3: Creating a Personal Development Plan		<input type="radio"/>
Task 4: Presenting a professional image		<input type="radio"/>
Task 5: Using feedback from colleagues		<input type="radio"/>
Task 6: Organising, prioritising and monitoring your workload		<input type="radio"/>
Task 7: Using organisational systems and resources		<input type="radio"/>
Task 8: Meeting legislation and regulations		<input type="radio"/>
Task 9: Treating all customers with equality and as individuals		<input type="radio"/>
Task 10: Interacting effectively with customers		<input type="radio"/>
Task 11: Providing a customer-focused experience		<input type="radio"/>
Task 12: Knowing your products and services		<input type="radio"/>
Task 13: Using digital media		<input type="radio"/>
Task 14: Improving your customer service offer		<input type="radio"/>
Task 15: Dealing with conflict		<input type="radio"/>

Reflective practice

Making the most of your learning

Reflective practice involves reflecting on your learning. It's a really important part of learning, because studies have shown that experience does not necessarily lead to learning unless you have taken time to actually think about the experience.

Reflective practice brings together theory and practice, forcing you to take a conscious look at your emotions, experiences, actions and responses. You can then use that information to add to your existing knowledge base and reach a higher level of understanding.

Reflective practice is part of the 'Consider' step of the PACT Learning Cycle:

- **Procure** – acquire new knowledge (theory), or an ability (skill). For example, understand what language is appropriate for speaking to customers.
- **Apply** – practise the new knowledge or skill in some way. For example, make calls to customers using appropriate language.
- **Consider** – evaluate and/or assess the results of the practice. For example, how did the calls go? Did you use any inappropriate language? This is where you would use reflective practice.
- **Transform** – modify the original knowledge or ability according to the results of your evaluation. For example, refining the list of what you can and can't say to customers.

You will use reflective practice in completing each of the tasks in this manual, considering what you have learned and how you will apply the learning.

When completing this task, you will need to:

- research some of the more famous reflective practice models
- consider the sorts of resources you might use to do reflective practice
- explain why reflective practice will be useful to your learning
- evaluate different reflective practice models and decide which is the best one for your own use.



Reflective practice

Making the most of your learning

Key models

There are many famous models that you can follow when you do your reflective practice. However, they all tend to follow the same basic stages:

1. **Reflection** – thinking about what happened.
2. **Understanding** – analysing what you can learn from it.
3. **Action** – taking your analysis and doing something useful with it to help you improve.

Similarly, in all reflective practice models there are key dos and don'ts when it comes to reflecting effectively.

- Make sure you reflect at appropriate times – intense experiences need a cooling-off period before cold reflection (objective, not subjective) is possible.
- Understand the difference between subjective and objective reflection. Although both types can be useful and relevant, you must try to balance them as part of arriving at the most helpful and clear overall understanding.
- Understand how and why you think in the way you do. Being self-aware can help you frame and understand your reflections in a way that might help you to draw more insightful conclusions.

Some of the key models that have been created by experts are outlined below.

Gibbs – reflective cycle model (1988)

- **Description** – what happened?
- **Feelings** – what were you thinking and feeling?
- **Evaluation** – what was good and bad about the experience?
- **Analysis** – what sense can you make of the situation?
- **Conclusion** – what else could you have done?
- **Action plan** – if the situation arose again, what would you do?

Lawrence-Wilkes – REFLECT model (2014)

- **Remember** – look back, review and ensure intense experiences are reviewed objectively.
- **Experience** – what happened? What was important?
- **Focus** – who, what, where, etc. Roles, responsibilities, etc.
- **Learn** – ask questions: why, what were the reasons, perspectives or feelings?
- **Evaluate** – causes, outcomes, strengths and weaknesses.
- **Consider** – assess options, needs and possibilities for change, development needs and 'What if?' scenarios.
- **Trial** – integrate new ideas, experiment, take action, make changes.

Consider whether either of these models would work for you.



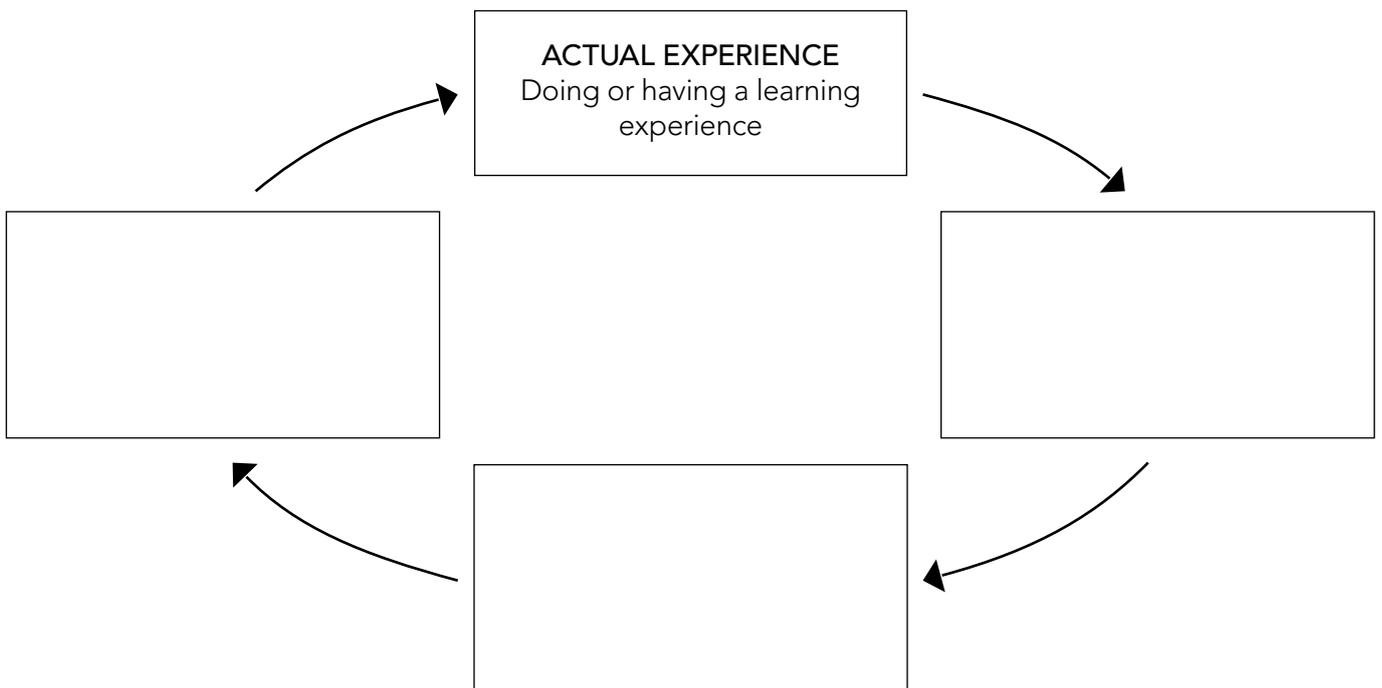
Reflective practice

Making the most of your learning

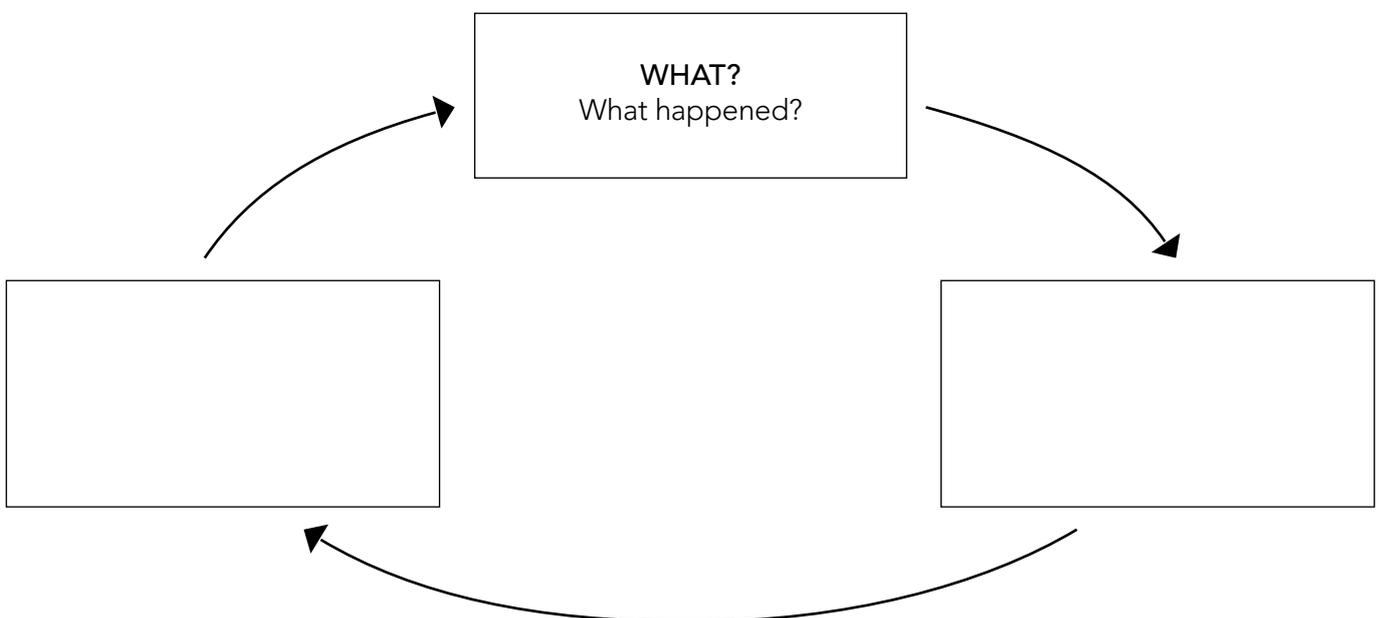
Preparatory activities

1. Research some of the other famous reflective practice models such as Kolb's, Rolfe's and Driscoll's. Label the following diagrams correctly.

a) Kolb's reflection and learning model



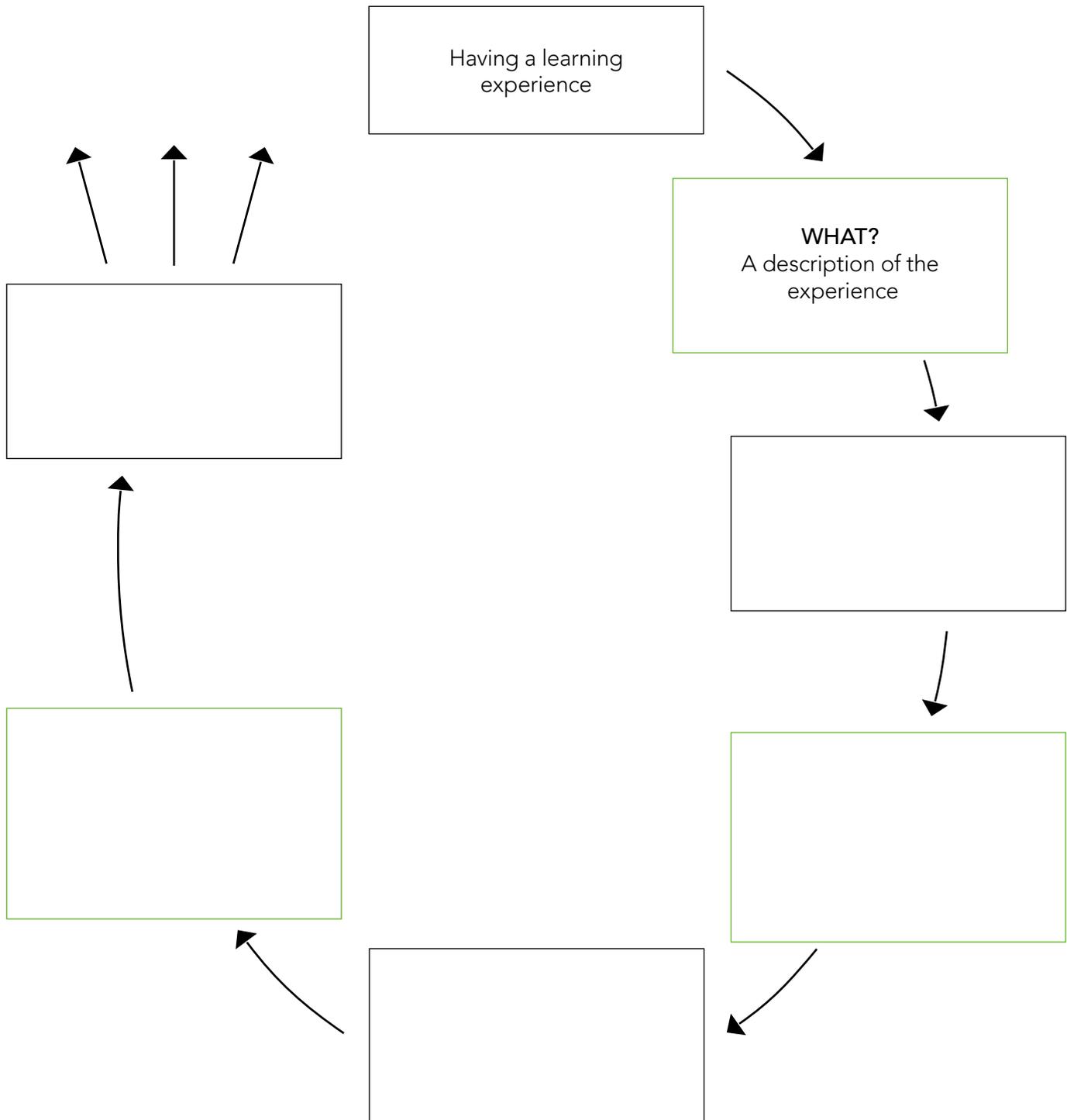
b) Rolfe's minimal reflective practice model



Reflective practice

Making the most of your learning

c) Driscoll's model of reflection



Reflective practice

Making the most of your learning

2. Resources that can help you reflect or get a new perspective on your learning include:

- written journals, notes or diaries
- sketches, pictures and diagrams
- social media
- academic study.

Consider the pros and cons of each resource and write these in the table below.

Resource	Pros	Cons
Written journals, notes or diaries		
Sketches, pictures and diagrams		
Social media		
Academic study		



Reflective practice

Making the most of your learning

Pick the resource type(s) you think will be most useful, and explain why you think this.

Method(s) I will use:

Reasons:

3. In your own words, explain why you think reflective practice is a useful part of the learning cycle.



Reflective practice

Making the most of your learning

Knowledge application

You will be carrying out reflective practice as part of each of the tasks in this manual. To prepare for this, think about **two** learning experiences you have had in the past (eg learning to drive, learning a language or learning an instrument), and use two different reflective models that have been considered here to consider each of these learning experiences. One example has been completed for guidance.

Example learning experience

Context: *Using correct tone in dealing with customer emails.*

Chosen model: *Gibbs model*

Reflective practice:

Description: I received an angry email from a customer, which used very aggressive language. Their order had been processed wrongly. I had nothing to do with the mistake, but was simply the person who was given the complaint to handle. When I replied to their initial email explaining the situation, they sent me a second email blaming me for the mistake and using personal language – calling me 'incompetent' and 'stupid' and so on. I wrote back in similarly personal terms and the situation got quite heated.

Feelings: I was really angry about what the customer was saying and what they were calling me. It made me upset and I lashed out.

Evaluation: My response was completely inappropriate and it was a bad way to handle the situation.

Analysis: I reacted badly and didn't think through my actions and the consequences properly before sending the reply.

Conclusion: I should have been more calm and professional, in spite of my feelings.

Action plan: Next time, I would use a strategy to calm myself down before replying.

Or I would write a reply but not send it, and come back to it later to see if I need to re-write it rather than send it in the heat of the moment.



Reflective practice

Making the most of your learning

Learning experience 1

Context:

Chosen model:

Reflective practice:

Reflective practice

Making the most of your learning

Learning experience 2

Context:

Chosen model:

Reflective practice:

Reflective practice

Making the most of your learning

Explain which method you found most useful, and why. You could consider using this model when completing the reflective practice parts of the tasks in this manual.

It's really important to reflect properly on what you learn as part of your programme, so make sure you make the time to complete each reflective practice exercise in full as you work through this manual.

