Assessment Support Pack

Communication: Analysing and Presenting Complex Communication — DE3N 34

and

Creating a Culture of Customer Care — H1F0 34

SCQF level7

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Introduction

This Assessment Support Pack can be used in a variety of ways including, for example:

- to generate evidence which demonstrates that learners have achieved all Outcomes and Knowledge and/or Skills for the two Units
- as exemplification of the standard of performance expected of learners achieving the Unit, ie as a benchmark
- to help centres develop an appropriate assessment for the Unit
- to give teachers/lecturers/assessors new ideas
- as a staff development tool

Security and confidentiality

This material is intended solely for the purpose of assessment of learners against National standards in SQA approved centres and must not be released prior to examination/practical test or distributed more widely for any other purpose.

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General information

Before using this Assessment Support Pack centres should read the relevant Unit specification which details the standard of performance expected of learners. It is important to ensure that this Assessment Support Pack is used in a context appropriate to the Unit and, if applicable, the associated Group Award. A copy of the Unit specification can be found on SQA's website **www.sqa.org.uk**.

This Assessment Support Pack supplements the section *Guidance on Approaches to Assessment for this Unit* found in the Support Notes. It provides an example of assessment that is valid, reliable and practicable. The assessment tasks correspond to the guidance contained in the Unit specification. Centres must ensure the integrity and confidentiality of the assessment.

Although the content of this Assessment Support Pack has been verified as a suitable assessment, centres should note that using it does not automatically guarantee successful external verification. It is the centre's responsibility to make sure that all the appropriate internal quality assurance procedures are satisfactorily followed. A valid and effective internal verification system should be in place.

Guidance on content and context for this qualification

This Assessment Support Pack supports the assessment of the Units Communication: Analysing and Presenting Complex Communication (DE3N 34) and Creating a Culture of Customer Care (H1F0 34) as taught within the HNC/HND Business, and Administration and IT awards at SCQF level 7. Centres are required to develop the assessment in accordance with the validated Unit specification.

The pack provides some integrated assessment for DE3N 34 and H1F0 34 (Tasks 1 and 2). Task 3, however, meets the requirements of DE3N 34 alone, though its content will support skills development for H1F0 34. DE3N 34 is a mandatory Unit within both the HNC/HND Business award and Administration and IT award. H1F0 34 is an optional unit within both awards. Both units are level 7 and likely to be delivered during year 1 (HNC) of the HND.

Opportunities for developing Core and other essential skills

DE3N 34 Analysing and Presenting Complex Communication gives automatic certification of the Core Skill of *Communication* at SCQF level 6. There are no other Core Skill components included. There is no automatic certification of Core Skills or Core Skill components in H1F0 34.

All elements of the Core Skill of *Problem Solving* – Critical Thinking, Planning, Organising, Reviewing and Evaluating — will be naturally developed as learners plan for and produce complex written and oral communication within available resources. Supportive feedback from the assessor at all stages of delivery would encourage review and self-evaluation.

Effective use of ICT in sourcing and presenting complex information will be routine. Accessing, using and storing electronic data will reflect workplace practice. The need to develop efficient systems of recording and storing information to meet professional standards should be emphasised. Learners could further develop technology skills as they plan and manage oral presentations of complex information.

There are opportunities to strengthen skills in Working with Others. Strategies to promote co-operative working relationships in Task 2 (taking part in a meeting) will underpin practical oral work, with identification, management and resolution of any potential problems as in authentic workplace practice.

All of the above skills are highly valued in the workplace: their development will enhance employability.

Dependent on preparation for the assessment tasks, there could be opportunities to develop knowledge and skills in Enterprise.

Related publications

Before using this Assessment Support Pack centres might find it useful to look at some of our other publications, in particular:

- Guide to Assessment
- Introduction to Assessment Arrangements
- SQA's Quality Framework: a guide for centres

Details of these and other SQA publications are available on our website. Most publications can be downloaded free of charge from our website at **www.sqa.org.uk** on the 'Publications, Sales and Downloads' section. If you require a publication to be sent to you, please telephone our Business Development and Customer Support team on 0303 333 0330 quoting the product code and, where a charge is applicable, have a purchase order number or credit card details available.

Section 1 — How to generate assessment evidence

The following information indicates the evidence which should be retained for external verification.

The Scottish Qualifications Authority's system of assessment measures the evidence of a learner's attainment of knowledge, understanding and skills against a defined set of criteria. Assessment must demonstrate competence at the level of the qualification and allow evidence of each learner's performance to be generated and collected. This evidence must then be judged against the standards set out in the Unit specification. To achieve a Unit, learners must generate the evidence required in relation to all Outcomes and Knowledge and/or Skills. This information is found in the Statement of Standards in the relevant Unit specification.

This Assessment Support Pack is consistent with the Statement of Standards for the Communication: Analysing and Presenting Complex Communication Unit at SCQF level 7 and Creating a Culture of Customer Care at SCQF level 7, and the following information applies when using it to generate evidence of learner achievement.

Assessment

Examples of suggested evidence to be retained will always include the assessment, marking information and learner assessment records or class assessment records, as appropriate.

Assessment	Outcome covered	Evidence to be retained
Task 1: Reading 'Customers' extract from Co-op Group Sustainability Report 2012. Summary and Evaluation of extract.	**DE3N 34/O1**	Summary and evaluation of reading text, either written or recorded.
Task 2: Preparing for and contributing to a formal meeting to discuss preparation of a report on customer care in an organisation of the learner's choice.	**DE3N 34/O3**	Notice of meeting; agenda and written minute of meeting (individually compiled); detailed assessor observation checklist of meeting (an audio recording would also be advantageous).

Assessment	Outcome covered	Evidence to be retained
Task 3(a): Document describing recognised principles of customer care (at least 500 words). **Task 3(b):** Evaluative report on customer care in an organisation of the learner's choice (at least 1000 words).	**DE3N 34/O2** **H1F0 34/O1** **DE3N 34/O2** **H1F0 34/O2**	The written reponses to tasks **3(a)** and **3(b)** will contribute to a portfolio of business documents fulfilling the necessary minimum word count of 1500 words for DE3N 34. At least one draft of report for task **3(b)** should be retained as evidence of authenticity.

Conditions of assessment

Task 1

Evidence should be generated in open-book conditions, controlled to ensure responses are individual and not the product of discussion. Time constraint should not be imposed since this could create unnecessary barriers. The learner should have free access to dictionaries, online resources and relevant class notes.

Task 2

The purpose and context of this meeting are formal: the papers produced should reflect this. Each learner should make preparatory notes for the presentation of an agenda item and these should be retained. These notes should be directly connected to the report being prepared for task **3(b).** The delivery of the agenda item may be supported by visual aids, or the distribution of supplementary papers. Each learner must individually compile a minute of the meeting following standard conventions. This should be succinct, not a full narrative record.

Provision is in place for the assessor to chair the meeting, taking the role of workplace mentor. However, one of the learners could also take the role of chair.

An audio or video recording of the meeting will assist learners with writing minutes, rather than attempting to deal with contribution to the discussion and minute-taking at the same time. It will also provide useful evidence for internal and external verification.

Tasks 3(a) and 3(b)

Task **3(a)** should be completed first since it is directly relevant to the evaluative report in **3(b).** Task **3(a)** is an open-book exercise, which may draw on relevant class notes. Learners should, however, be doing more than simply copying out their notes. They should make reasoned points, and give relevant examples. For Task **3(b)** deadlines for the submission and evaluation of initial work prior to redraft of materials should reflect workplace practice and allow for feedback. Preparing for the meeting in Task 2 should mean relevant ideas are already on paper. These plans and outlines, and effective organisation of notes and reference materials, should support the production of the final report, encourage good working practice and provide evidence of authenticity. The final report for Task **3(b)** should be consistent with professional practice.

Although word-processing is not mandatory, this would be normal practice for learners undertaking the HNC/HND Administration and IT and HNC/HND Business group awards. A minimum expectation is that the document should be prepared and presented in such a way that it could be passed to an administrator for word processing.

Graphics may support and supplement the text.

The word total may include supplementary texts produced by the learner, such as emails, plans, briefing papers, record of interviews etc. It should not include the list of references or text imported from other sources.

Quality assurance

Centres should retain assessment evidence and internal verification records. Units are subject to external verification by SQA. This combined ASP therefore generates material subject to external verification by two specialists and full evidence should be retained for both of these.

Re-assessment

Time is allowed within Units for assessment and re-assessment of Outcomes. Where learners have not attained the standard necessary to achieve a particular Outcome or Outcomes, they should have the opportunity to be re-assessed. SQA's advice is that there should normally be one Unit re-assessment opportunity, or in exceptional circumstances two. In some cases learners may be required to resubmit original work which has been revised to take account of earlier weaknesses. In other cases, learners may be required to undertake a new assessment designed to assess the particular Outcome(s) in which they were unsuccessful. In all cases, evidence from the original assessment should be used for formative purposes prior to re-assessment.

Opportunities for e-assessment

For all modes of delivery, assessment conditions and quality assurance arrangements must ensure that the same standard is applied for all learners.

E-assessment may be appropriate for some assessments in this Unit.
By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or social software. Centres which wish to use e-assessment must ensure that the national standard is applied to all learner evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. The most up-to-date guidance on the use of e-assessment to support SQA's qualifications is available at **www.sqa.org.uk/e-assessment.**

Equality and inclusion

The Unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence. Further advice can be found on our website **http://www.sqa.org.uk/assessmentarrangements**.

Section 2 — Assessment

The assessment example(s) below can be used by centres, or alternatively centres can develop their own assessment.

Centres might, for example, use a similar business report in their own preferred ‘house style’ as a model response for Task 3. Centres are reminded that prior verification of centre devised assessments would help to ensure the national standard is met.

The purpose of creating this combined assessment is to demonstrate the possibilities of integrating assessment across Units and Outcomes in a way meaningful to learners. It clearly demonstrates that the HNC/HND awards are not simply a collection of Units but that the choice is defined to meet the needs of future careers.

This combined assessment has the Unit Creating a Culture of Customer Care H1F0 34 Outcomes 1 and 2 embedded within Assessment 3, which also covers evidence for Outcome 2 of Communication: Analysing and Presenting Complex Communication DE3N 34.

In terms of planning for learning and assessing, these Units can be delivered in the same semester or time allocated across the two semesters.

Where these Units are delivered and assessed by two assessors, agreement will need to be reached regarding submission of assessments, marking order and reassessment process.

Although the two Units concerned belong to two separate Verification Groups, the materials should be presented as a whole for External Verification.

The following documents are associated with this ASP and are available on SQA secure site:

- Co-op Customers 2012.pdf (text for Task 1 assessment)
- Customer Care in the Co-op.pdf (exemplar report for Task 3b).

Task 1

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 1 — Analyse complex written business information

Read the 'Customers' excerpt of the Co-op Group Sustainability Report for 2012 provided by your tutor/assessor.

Then answer the following questions.

1 Summarise the main points from *Customers* that are relevant to the business of *Co-operative Food*. Identify and include key supporting detail in your summary. Use your own words as far as possible.

If presenting your work in writing, you should be able to produce your summary in approximately 400–500 words.

2 Evaluate the success of the report in terms of intended reader and purpose.

Think carefully about the intended readers of the report (members, customers and stakeholders) and the obvious purposes of the document in terms of both information and marketing. Bear this in mind when writing your evaluation.

Your evaluation should comment on

- Content (To what extent is it relevant to purpose/readership? Are facts and figures sufficient to support conclusions? Back up with examples.)
- Format (To what extent is this format effective, in terms of purpose and readership? Consider the way annual report information is usually presented: balance of text, photographs, tables etc.)
- Language (How appropriate is the style? To what extent is it professional and persuasive? Comment and back up with an example.)
- Structure (Is it structured effectively in terms of purpose? Consider sections/development from one idea to the next.)
- Layout (How goes it look on the page? — comment on the quality of the reading experience and the contribution to purpose of colour, graphics, tables, photographs, etc)

If presenting your responses in writing, your evaluation is likely to be between 350 and 500 words in length.

Guidance for making an assessment decision

Task 1

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 1 — Analyse complex written business information

Learners are required to read the 'Customers' excerpt from the Co-op Group Sustainability Report for 2012. This is available in PDF format from SQA's secure website — Co-op Customers 2012.pdf.

Learners are required to answer the following questions. Responses can be made in writing or orally. If oral responses are used, they must be recorded or noted down in full.

1 Summarise the main points from *Customers* that are relevant to the business of *Co-operative Food*. Identify and include key supporting detail in your summary.

Responses will vary in terms of detail but should mention *at least* the following, though generalised comment may not include precise figures. Learners will inevitably 'lift' some key phrases but should not copy out whole sentences. Comments may use abbreviated formats such as bullet points or numbers. **(NB style, punctuation etc is not being assessed in this Outcome, only accurate summary of content and key supporting detail.)**

- Context — poor economic climate means customer loyalty and first class service are crucial.
- Customer satisfaction is a strategic priority.
- Social networks are now used to improve customer engagement.
- CSI shows customer satisfaction at Co-op food has not met targets for 2012 and this has resulted in a reduced target for 2013.
- The report explains how customer satisfaction is tracked monthly using a satisfaction scale (CSI).
- A new method is planned for 2013 (but no detail given).
- Value for money and product availability/range were highlighted as key areas of concern.
- Food related complaints to customer relations have reduced by several thousand since 2010 (31,437 to 27,007)
- The role of Customer Relations in handling escalated complains and requests for information is discussed. It provides a useful source of information about what concerns consumers currently.
- Customer engagement is also discussed, in particular the use of new technology and current social media campaigns.
- Three consumer panels are described: The Taste Team (employee-customers), an online discussion/community group and 'Talking Shop', a private online group.

- Some reference to the Ethical Consumer Report should be made, since its findings relate to food purchasing and the relevance of ethical choices.
- Readers are not expected to make use of the notes, other than for personal interest.

- **Supporting detail** — some reference to tables, showing figures year by year would be expected. Some learners could mention the graphic of a carrier bag, highlighting recycling policy, or pull-out quote highlighting high numbers of customers.

2 Evaluate the success of the report in terms of intended reader and purpose.

Evaluation of strengths and/or weaknesses will obviously vary from one learner to another. Points should be reasoned and backed up by reference or quotation. It is not essential to find weakness in the document, though perceived weaknesses may be raised. Some of the following points, or similar, would be appropriate. Format, language, structure and layout must be explicitly mentioned in the discussion, though the evaluation may discuss more than one of these at once:

- **Content** — Reports closely on statistics gathered during the previous year as well as over a four-year period: of major interest to stakeholders. Findings on customers are carefully matched to findings on different aspects of Co-op Group business — key discussion of CSI findings
- **Format** — A glossy, full-colour report, presented in line with what would be expected from an annual report designed to impress; the page works well read on screen
- **Language** — Business-like, clear with the accent on the positive: ‘As of December 2012, more than 168,000 people liked or followed one or more of our social media pages’. Use of ‘we’ and ‘our’ gives a sense of ownership and a slightly personal approach. Style mainly straightforward and easy to understand: ‘We are increasingly utilising social media to drive customer and member engagement.’ Learners perceive some jargon as a potential weakness (‘materiality’, ‘engagement channels’)
- **Structure** — Structure is logical, moving from introductory sections on context and strategy, through key aspects of customer care discussed for each of the Co-op businesses; detailed notes at the end to support text
- **Layout** — Comment expected on use of colour — key points or pull-out quotes highlighted in orange; consistent use of heading styles to guide the reader; tables to make statistics easy to understand at a glance; varied graphics

Suitable assessment checklists for each task are supplied at the end of this pack.

Task 1 — Question 1

Exemplar learner summary: ‘Customers’

The Customer document opens with a description of the economic context: customer expectations are high but confidence is low. Building customer loyalty is vital at a time when the economy is not in a good state.

The Co-op Food has roughly 14.1 million customers weekly. Customer satisfaction is a strategic priority. Customer satisfaction is measured through surveys and the salaries of executives are linked to this. Customer engagement is increasingly promoted through new methods like consumer panels and social media.

Targets for customer satisfaction in 2012 and 2013 are given, together with progress. The Co-op Food narrowly failed to meet its 2012 target and the target for 2013 is significantly lower.

The use of CSI (Customer Satisfaction Index) as a measure is explained briefly (there is a fuller explanation in an endnote). A new method for the Co-op Food is announced for 2013 in response to a failure to meet CSI targets. Key areas for improvement are value for money and product availability/range.

A table is used to measure headline performance of complaints. Customer relations complaints, which are mainly food-related, have fallen by several thousand since 2010 (interesting when compared with the Co-op Bank where they have more than doubled).

The method of dealing with complaints via Customer Relations is briefly described. The report also includes customer engagement targets relating to the promotion of the Co-op’s ethical choices. A new platform game, ‘The Bee’ is cited as progress. The target for 2013 emphasises further use of new technology.

Other initiatives for customer engagement include:

- a consumer panel of employee-customers, sampling and reporting on products
- a public online discussion group or ‘community’
- a private online ‘talking shop’

The paper concludes with a reference to the Ethical Consumerism report which suggests the market for sustainable products, such as FairTrade goods, has not been damaged by the recession.

Supporting details: tables are used to display targets from year to year. A graph compares ethical spending in the UK between 1999 and 2011 using colours to indicate different Co-op businesses. A box highlights social media campaigns with relevant pictures. A pull-out quote highlights the number of Co-op Food customers each week and is illustrated with the picture of a green Co-op (recyclable) carrier bag to drive the sustainability message home.

[376 words]

Task 1 — Question 2

Exemplar learner evaluation: ‘Customers’

The ‘Customers’ document is a section from the Co-operative Group’s annual report. As you would expect with a document of this kind, the format exploits full colour to create an eye-catching effect. On paper it would be glossy and attractive to pick up. On screen (which is where I read it) the use of yellow to highlight key paragraphs was attractive and effective. It is laid out in columns with plenty of space for easy reading.

Paragraphs are generally short with a minimum of jargon and tables are used to make statistics and targets easy to understand and compare for the different Co-op businesses. It conveys essential information to stakeholders and customers clearly.

At the same time (and while acknowledging poor results in some areas) it highlights success. Though customer satisfaction scores had actually gone down in 2012, bright yellow writing was used to draw attention to the huge number of customers in 2011 — 14.5 million per week! This made the business look very effective so it was a good promotional tactic. There was, however, no table to show whether the numbers of customers had gone up or down in the period of time discussed.

The language was clear and easy to understand, but it was also the language of promotion, especially at the start, so the tone was both business-like and positive eg ‘Customer satisfaction is a strategic priority’. This was appropriate for an annual report.

The document begins with a context statement and moves through discussion of each of the Co-op businesses, ending with detailed notes for readers who want to follow up on some aspects of content. This is logical and easy to follow, and it’s always easy to see which Co-op business is under discussion.

The graphics were relevant and enhanced the layout — the little green carrier bag was an obvious link that shoppers would recognise. There was *some* jargon, which could put off or confuse some readers such as KPI (unexplained) for Key Performance Measure, and the heading of ‘Materiality and strategy’. Most people would understand ‘strategy’ but what is ‘materiality’?

[346 words]

Assessment Task 1 Exemplar Learner Record

<table>
<tr><td colspan="5">DE3N 34 Communication: Analysing and Presenting Complex Communication

Outcome 1 — Analyse Complex Written Business Information</td></tr>
<tr><td>Class</td><td colspan="2">HND Admin & IT</td><td>Group</td><td>3</td></tr>
<tr><td>Learner’s name</td><td colspan="2">Talha Kahn</td><td>ID no.</td><td>78893</td></tr>
<tr><td colspan="2">Evidence requirements</td><td>Achieved Y/N</td><td colspan="2">Comments</td></tr>
<tr><td colspan="2">Summarise the main points and supporting detail</td><td>Y</td><td colspan="2">Good summary covering all main points and some relevant supporting detail.</td></tr>
<tr><td colspan="5">Evaluate the effectiveness of format, language, structure and layout in meeting the needs of purpose and readership</td></tr>
<tr><td colspan="2">♦ format</td><td>Y</td><td colspan="2">Good awareness of how this format suits expectations for an annual report.</td></tr>
<tr><td colspan="2">♦ language</td><td>Y</td><td colspan="2">Appropriate comment (backed up by quotation) on promotional choice of words and use of jargon.</td></tr>
<tr><td colspan="2">♦ structure</td><td>Y</td><td colspan="2">Yes, structure and development are logical and clear.</td></tr>
<tr><td colspan="2">♦ layout</td><td>Y</td><td colspan="2">Good awareness of how this format suits expectations for an annual report.</td></tr>
<tr><td colspan="5">Assessor’s feedback
A set of well-expressed evaluative comments. I agree with your assessment of this document. You have made your points clearly, especially the way the report manages to convey the problems the Co-op has obviously had, while still putting the business in a positive light. I agree with your comment about ‘materiality’ too!</td></tr>
</table>

Unit and Outcome	**Achieved Y/N**	**Assessor’s signature**	**Date**
Communication: APCC DE3N 34 Outcome 1	Y	Eilidh McGregor	22.11.2013

Assessment

Task 2

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 3 — Organise and participate in a formal meeting

Scenario

You are working as an intern with MacTaggart Consulting, an organisation who deliver training on customer-related issues. As part of your training you have been asked to write an evaluative report on the customer care culture of an organisation of your choice.

Other interns are based in different parts of the consultancy. You have been encouraged to keep in touch with each other and form a mutual support group. Usually you get together about once a week in the staff base to talk about how your work experience is going. Each person takes minutes of the discussion.

You decide to call a meeting with the other interns to discuss the report task. Your mentor says she would like to come along to hear how things are going and she offers to chair the meeting.

1. Send out an invitation to the meeting by email. Since this is a notice of meeting it should include the topic, the date and time, and a proposed venue. You need at least four interns at your meeting. Don't forget to ask them to get back to you with availability as well as the details of their chosen organisation. You will need these details for your agenda.

2. Once you know who is attending, create an agenda for the meeting. Each intern will speak about the organisation they've chosen and how their research is progressing. This means each person will be responsible for one agenda item.

3. Prepare your own agenda item. This will involve making notes on your progress so far; what you've found out about your chosen topic; what difficulties (if any) you've encountered; and what proposals you're considering. You can create a brief electronic presentation if you think it helpful. Alternatively, you could circulate a briefing paper and talk through the points it raises. Your item should take about five minutes including questions and discussion.

4. Carry out your agreed role in the meeting. Each intern will present and discuss their item according to the agenda.

5. Complete a set of minutes of the meeting. These will include a brief note of the main points raised by each person as well as any action points. A voice/video recording of the meeting may be made to help you with this task.

If you need assistance designing an agenda or writing the record of the meeting, there are company exemplars you can look at. Ask your mentor or tutor if you do not already have these in your notes.

Guidance for making an assessment decision

Task 2

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 3 — Organise and participate in a formal meeting

Assessors should ensure learners have the necessary equipment and venue to enable the assessment to go ahead. Provision is made here for the assessor to chair the meeting (in the role of work mentor). Presentations of agenda items, including responding to comments or questions from others, should not generally exceed five minutes for each learner.

Each learner should individually generate an email notice and agenda for the meeting. These are likely to be similar but should not be identical. They must be accurate and suitable for professional use (see pages 18–19 for exemplars).

Learners should come to the meeting with **preparation notes** to support their agenda item and these should be retained as part of the evidence for this outcome. The agenda of one of the learners should be used to support the structure of the meeting.

A pro-forma for minutes may be used, according to the chosen practice of the centre. It is not necessary to compile a full narrative minute but the succinct record should retain sufficient detail to provide a useful reference for the learner. Minuted items must match the agenda. An example is provided on pages 20–21. This is only one possible format and each centre should feel free to introduce templates or business documents to suit their own house style.

The assessment record and observation checklist (a suggested template is provided at the end of this pack) can be discussed with the learner in advance to clarify understanding of what is being assessed in the meeting. However, the need for assessment should not take precedence over the holistic integration of this activity as a meaningful exercise. Genuine discussion of ideas should take place, with the opportunity for the assessor to clarify requirements for Assessment 3 (the written report) or to redirect learners to notes on Customer Care.

The Observation Checklist and Assessment Record must contain detailed comment from the assessor, matching strengths and/or weaknesses of learner performance to Evidence Requirements. A completed exemplar is included on pages 22–23.

While it is not mandatory to video record the session, it is recommended that at least an audio recording is made. This will help learners compile a written record of proceedings after the meeting. Some video evidence would provide useful material for Internal Verification, centre standardisation and External Verification.

Exemplars of learner documentation

E-mail notice of meeting

From: John Cracker <j.cracker@magtaggart.org>
Subject: Reprographics review meeting
Date: 28 January 2014
To: Sheila Smith, Ash Assif, Eildh McGregor, Jennifer Wong, James Blair

Dear Eilidh, Sheila, Ash, Jennifer, James

There will be a meeting to review progress on our customer care report task on Monday 3 February in meeting room 2 at 2.30 pm. The meeting is unlikely to last longer than 40 minutes.

Please confirm your availability and choice of organisation. If there's anything you'd like me to add to the agenda, let me know.

Best wishes

John

Exemplar agenda

Interns Review Meeting: MacTaggart Consulting
3 February, 2014
Meeting Room 2

Agenda

1 Welcome
2 Minutes of last meeting.
3 Matters arising.
4 Ash: The Co-op Food.
5 Sheila: John Lewis Stores.
6 John: Pitcorthie Health Centre
7 Jennifer: Easyjet
8 Jim: Aldi Stores
9 AOCB
10 Date of next meeting.

Combined notice and agenda

Interns Meeting

A meeting of interns will be held next week to discuss progress on customer care reports.

The meeting will be chaired by Jayne Cuthbertson.

Date: 03.02.2014
Time: 14.30 – 15.30 hours
Location: Meeting room 2, Opus Building.

Please let John Cracker know if unable to attend or if you need further information.

Agenda

1 Welcome
2 Minutes of last meeting.
3 Matters arising.
4 Ash: The Co-op Food.
5 Sheila: John Lewis Stores.
6 John: Pitcorthie Health Centre
7 Jennifer: Easyjet
8 James: Aldi Stores
9 AOCB
10 Date of next meeting.

Circulation: Ash, John, Sheila, Jennifer, Eilidh.

Exemplar minutes

Interns Review Meeting: MacTaggart Consulting
3 February, 2014. Meeting Room 2
Minutes of Meeting

Present: Sheila Smith, Ash Assif, Eilidh McGregor (Chair), Jennifer Wong, John Cracker
Apologies: James Blair

	Agenda Item	**Action**
1	**Welcome and apologies** Eilidh welcomed all present to the meeting. Apologies were noted for Jim, who is off sick.	
2	**Minutes of last meeting** The minutes of the last meeting were agreed as accurate.	
3	**Matters arising** There were no matters arising.	
4	**Ash: The Co-op Food** Ash had found information about the Co-op customer care policy in documents published online. She had also scheduled an interview with a local store manager to find out about staff training. She shared a paper outlining the customer care standards to be discussed in her report.	Ash to carry out interview with Co-op Food store manager.
5	**Sheila: John Lewis Stores** Sheila had also found information online about John Lewis Partnership's customer care practice from which she had drawn up strategic principles. She had not thought of interviewing a local manager but agreed that this was an excellent idea.	Sheila to set up interview with a member of John Lewis customer service staff if possible.
6	**John: Pitcorthie Health Centre** John had chosen his local health centre as a suitable subject for the report. He had obtained a customer strategy statement from the practice manager. He ran through this using PowerPoint slides to highlight key points. The group discussed methods of evaluating the practice's customer strategy.	

7	**Jennifer: Easyjet** Jennifer outlined the history of Easyjet as a budget airline, from 1995 to the present. She circulated copies of the EasyJet Customer Charter. She brought in newspaper articles highlighting recent customer problems faced by the company. These were discussed in some detail by the group since they were relevant to evaluating customer care strategy.	
9	**A.O.C.B.** There was a discussion of the style required in the report. It should be plain English and fairly formal. Eilidh promised to circulate examples completed by previous interns.	Elidh to circulate sample reports to the interns, including Jim who missed today's discussion.
10	**Date of Next Meeting** The next meeting would be in approximately three weeks, venue, date and time to be notified by email.	

Assessment Task 2 Exemplar Learner Record

<table>
<tr><td colspan="4">DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 3 — Organise and participate in a formal meeting</td></tr>
<tr><td>Class</td><td>HND Business</td><td>Group</td><td>2</td></tr>
<tr><td>Learner’s name</td><td>John Cracker</td><td>ID no.</td><td>67893</td></tr>
<tr><td>Names of other participants.

Name of Chair</td><td>Sheila Smith, Ash Assif, Jennifer Wong.

Chaired by assessor (Eilidh), in role of work mentor</td><td>Date of meeting:</td><td>3.12.2013</td></tr>
<tr><td colspan="2">Evidence requirements (oral)</td><td>Achieved Y/N</td><td>Detailed observation/ comment</td></tr>
<tr><td colspan="2">Agenda item prepared and presented accurately and effectively. Effective preparation may include:
♦ detailed research
♦ selection of relevant data
♦ sound conclusions
♦ effective sequencing
♦ signposting
♦ confident, clear delivery
♦ effective use of planning notes</td><td>Yes</td><td>John outlined his research into the customer care policy of his local General Practice, sharing his notes on the interview he had already carried out with the practice manager. His input was carefully planned, well sequenced and mainly confident. He spoke freely, using well-prepared PowerPoint slides to highlight key points.</td></tr>
<tr><td colspan="2">Learner uses appropriate tone, pace and non-verbal communication. Evidence of achievement might include:
♦ tone and pace adjusted for purpose and audience
♦ clear and audible voice
♦ eye contact
♦ interested expression
♦ confident open posture</td><td>Yes</td><td>Audibility was a problem at first but John quickly noticed (good eye contact) that we were straining to hear and adjusted pace and volume accordingly. When other people were speaking, his body language was attentive and alert.</td></tr>
</table>

Learner responds to others to progress interaction by, for example: ♦ **giving and receiving information** ♦ **listening attentively** ♦ **use of open questions** ♦ **responding constructively to others** ♦ **giving and receiving positive feedback**	Yes	Handled questions well on his report planning, and was supportive to others, with both questions and comments. This led to a useful discussion with a number of action points agreed by the group.
Evidence requirements (written)	**Achieved Y/N**	**Comment**
♦ **notice of meeting (email)**	Yes	Clear and business-like.
♦ **agenda for meeting (may be included in email notice)**	Yes	Well-presented and covers all essential items.
♦ **preparation notes for agenda item**	Yes	Used notes intelligently while delivering agenda item, and shared a copy of interview questions using PPT slide.
♦ **written record of meeting**	Yes	Brief but effective minutes of meeting, using action point format.
Is recording of meeting available?	Yes (a video recording was made to assist in compiling a minute of the meeting which can be accessed on Moodle).	

Unit and Outcome	**Achieved Y/N**	**Assessor's signature**	**Date**
Communication:APCC DE3N 34 Outcome 3	Y	Eilidh McGregor	03.12.2013

Assessment

Tasks 3

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 2 — Produce complex written business documents

Creating a Culture of Customer Care H1F0 34

Outcome 1 — Analyse factors contributing to a culture of customer care
Outcome 2 — Evaluate the customer care strategy of an organisation

Scenario

You are working as in intern in a large consultancy that delivers training on organisational issues. One of their main areas of focus is excellence in customer service. As part of your training, your work mentor has suggested you create a portfolio of documents about customer care strategy and practice. This is your chance to impress! If you can do it well, it will improve your chances of finding a permanent position.

Your written task is divided into two parts.

(a) Write a short analysis (750–1,000 words) of the factors that contribute to a culture of customer care. Describe some recognised principles of customer service (eg knowing your customers; meeting and exceeding customers' needs; engendering loyalty through customer satisfaction; establishing customer relationships and building rapport) and explain how and why they are important. Justify your reasoning with examples of actual practice (you may want to refer to the organisation you research for Task (b). Keep in mind the difference between *acceptable* and *excellent* customer service. Your analysis should focus on the following aspects of customer care:

- Identifying and meeting the expectations of key customers
- Dealing with customer care problems (at least two types)
- Maintaining customer aftercare
- Obtaining and monitoring qualitative and quantitative customer feedback

(b) Write a report of at least 1,000 words evaluating the customer care strategy of an organisation of your choice. Select an organisation that has printed information about its customer care strategy or policy (include this as an appendix to your report). You might choose an airline, a local business, a national retail chain such as John Lewis, or Marks & Spencer, a travel agent, or an organisation in which you have worked yourself. You will need to do some research to track down the information you require, so keep a careful note of your sources, since your report should be appropriately referenced. Now look back at the principles you documented in Task (a) and apply them in evaluating the customer care strategy of your chosen organisation.

Give your report a clear title and then use the following structure for the main text. You will have at least four headed sections, which you may also subdivide.

1 **Introduction** — Explain your aim and remit. Say by whom the report was requested. Include a brief description of the organisation you chose and reasons for choosing it.

2 **Customer Service Standards** — Describe the customer care standards set by your chosen organisation and the way they are implemented. Use their policy documents, mission statements etc to help you.

3 **Evaluation** — Evaluate the suitability of the standards. Then evaluate the effectiveness and efficiency of the organisation's customer care strategy/policy, with brief conclusions. (Discuss at least **two** problems the organisation has addressed recently.)

4 **Proposals for continuous improvement** — Based on previous points, make proposals on methods of ensuring continuous improvement of customer care in the organisation you have chosen.

Your *judgments* on effectiveness and efficiency should be based on sound reasons and refer to relevant examples from the organisation. Your *conclusions* should be clear and follow logically. These conclusions will form the basis of your *proposals*, which should be realistic and practicable. Make sure you remember to:

- use appropriate layout and format
- use consistently accurate spelling, syntax and punctuation
- check all information for accuracy
- present the report so as to achieve maximum impact

Make sure your style is clear and businesslike. Avoid using 'I' if you can.

Your report should conclude with a list of source references, using a standard system such as Harvard. These may include references to interviews or surveys you have carried out yourself. There will be some supplementary papers, such as a copy of the organisation's customer strategy, their annual report, correspondence, interview records etc.

Your mentor/assessor may be able to provide you with an example of a completed report to assist you.

Guidance for making an assessment decision

Tasks 3

Communication: Analysing and Presenting Complex Communication DE3N 34

Outcome 2 — Produce complex written business documents

Creating a Culture of Customer Care H1F0 34

Outcome 1 — Analyse factors contributing to a culture of customer care
Outcome 2 — Evaluate the customer care strategy of an organisation

Task 3(a)

Learners should be able to draw on class notes or other relevant sources to complete this document, which will provide evidence for *Creating a Culture of Customer Care* H1F0 34 Outcome 1 and may form part of the written portfolio for *Communication: Analysing and Presenting Complex Communication* DE3N 34 Outcome 2. Some learners may choose to illustrate the principles with reference to a particular organisation, including the one used for Task b. This is acceptable.

Identifying and meeting the expectations of key customers

The learner's analysis of key principles must be valid and *reasoned*. When discussing, for example, methods of identifying expectations, they should be able to explain the importance of both meeting and exceeding expectations as a method of building customer loyalty and repeat business, enhanced reputation etc.

Dealing with two different types of customer care problems

A wide range of customer care problems may be discussed eg failure to supply on time, faulty service or product, disappointed expectation, handling of complaints, demand and supply problems, inaccurate information supplied to customers. Methods of dealing with such problems will be justified logically, with reference to the importance of building rapport and relationships, effective communication, courtesy, respect etc.

Maintaining customer aftercare

This could include reference to follow-up phone calls, conversation on next visit, surveys, questionnaires etc. Justification is likely to make reference to customer loyalty, reputation, etc.

Obtaining and monitoring qualitative and quantitative customer feedback

Learners should provide evidence of clear understanding of the difference between qualitative and quantitative data, appropriate procedures for gathering both, and some relevant reasons for using both methods.

An exemplar learner response is included on page 28.

Task 3(b)

The Ash Assif report on The Co-op Food (see supplementary file — Customer Care in the Co-op.pdf — and/or page 30 of this ASP) provides an exemplar of appropriate evidence for both *Communication* DE3N 34 Outcome 2 and *Customer Care* H1F0 34 Outcome 2. **If shared with learners, they should not themselves choose any of the Co-op businesses for their own report**.

The document produced as part of Task 3(a) may also contribute to the written portfolio for DE3N 34 Outcome 2, which must be at least 1500 words in total. The combination of the two tasks, however, is likely to lead to a far higher word count in total and it would be possible to use only Task 3(b) to supply evidence for the standard for *Communication* DE3N 34 Outcome 1, especially in a learner whose level of accuracy is far better in the second document, which is more likely to lend itself to redrafting.

The 'brief' is as described in the Task 3(b) statement. The 'prescribed format' for this business document is as indicated in the section headings. Learners should therefore follow this structure, which will additionally help them supply appropriate evidence for *Customer Care* H1F0 34 Outcome 2. It may be helpful to discuss the exemplar with them since it illustrates appropriate conventions and format. They should, however, write about a different organisation. Assessors can assist learners in their choice of organisation. If learners are in full or part-time employment they may choose to focus on the organisation in which they currently work.

Communication DE3N 34 Outcome 2 requires consistently accurate spelling, syntax and punctuation. This standard is likely to be achieved through more than one draft. Draft plans and outlines should be retained as additional evidence of authenticity.

It is not mandatory to word process report documents, but since this would normally be expected in a business environment, it is strongly encouraged.

Source references for Task 3(b) should be presented in a standard format according to the centre's referencing policy and/or practices.

Examples of learner responses for Task 3(a) and Task 3(b) follow on pages 28 and 30.

An exemplar assessment checklist has been completed giving feedback on both learner documents (see pages 39 and 40).

Blank assessment checklists are provided at the end of this pack.

Task 3(a)

Learner exemplar

Recognised principles of customer service

Identifying and meeting the expectations of key customers

Any organisation needs to know its customers and identify key expectations that must be met. This is only the first stage. Good quality customer care will ensure expectations are not only met but exceeded. For example, Bunches.co.uk includes free chocolates as standard with all flower orders, making them stand out from other suppliers. The term 'customers' extends to both internal and external individuals, as well as the whole supply chain. Those individuals who order flowers from Bunches are one type of customer, but Bunches themselves are customers of flower suppliers in several parts of the UK. With all types of customers the quality of the relationship is important. Good communication skills will enhance rapport, whether the connection is face to face, on the phone, live chat or in writing. Staff dealing with customers need to be knowledgeable and well-informed. If expectations are not only met but exceeded, turn and churn will be avoided. The customer is less likely to look around for a better service and will make recommendation to other friends. This kind of loyalty is crucial in a competitive environment and can be strengthened not only by quality service, on-line chat to deal with problems, money-off coupons etc but also by loyalty schemes such as credit points against future purchases, Nectar point schemes etc.

Dealing with two different types of customer care problems

The most obvious indicator of a customer problem is a formal complaint. It is necessary to have a robust complaints system with a clear policy and SMART targets for completion. The time windows for dealing with complaints should be publicly shared and complied with. Courtesy and respect in all customer communication are crucial. No member of staff should make a promise they cannot keep. A complaint should be seen as valuable because it can be remedied. It is a clear indication that expectation has not been met. If it is handled intelligently it can increase customer loyalty. Most dissatisfied customers do not make formal complaints, though they will share dissatisfaction with their friends. For this reason, proactive methods of seeking customer feedback are also important. This may be through follow-up survey, phone calls, etc.

Sometimes customer care problems are unavoidable. For example, a failure in the supply chain may mean that a product cannot be supplied by the expected date. In this case, proactive intervention can reduce customer dissatisfaction and increase the sense that the customer is a valued individual. A strike at a shipping port might mean that tulips required for customer orders would not arrive in time to meet deadlines. Awareness of this problem could mean an alternative supplier could be found. Alternatively, an apology and offer of an alternative product might solve the problem before serious dissatisfaction occurred.

Maintaining customer aftercare

Customer aftercare is important. Many organisations, especially where online purchases are involved, send email requests for follow-up surveys. These can provide useful quantitative data (see next section) though only about 20% of customers are likely to fill out the survey. Placing emphasis on the brevity of the survey or the short time needed to complete it can help, or the offer of a discount coupon or competition prize as a 'reward' for completing the survey. Some organisations (British Airways, for example) send requests for rating by text message. Since texts take little time to send, this has a higher rate of response. In retail contexts where the customer is a regular one, staff can check by personal question whether a product has been successful. A good hairdresser will always ask the customer whether they liked the previous treatment and many offer, as a free interim service, to cut the customer's fringe etc. The reputation of the business hinges on satisfied customers so aftercare, in terms of gauging satisfaction, is a key factor in planning continuous improvement.

Obtaining and monitoring qualitative and quantitative customer feedback

Quantitative feedback is usually obtained through a survey requesting a number rating. For example, the British Airways text feedback request asked for flight satisfaction to be rated on a scale of 1 to 5. However, BA also use text messages to get qualitative feedback. Another text request asks customers to say the main reason why they chose to travel British Airways. This requires an extended open statement. Quantitative feedback is easier to obtain than qualitative feedback because it is quicker to circle three numbers than put into words an opinion. It is also easier to monitor than a question, which could collect any number of replies. Telephone surveys, commissioned by many organisations, will include both quantitative and qualitative questions. Many organisations collect such information each year, which allows them to monitor changes. For example, the Co-op has scores and targets each year for Customer Satisfaction, Customer Relations and Customer Engagement, and these are compared over a four-year period in their annual report. A reduction in purchases or customer visits is, in itself, a form of feedback since customers can 'vote with their feet'. For this reason it is essential to collect feedback proactively before the customer decides (for reasons unknown) to go elsewhere.

[853 words]

Task 3(b)

Learner exemplar

Evaluation of Customer Care Strategy (available as a stand-alone document on SQA HN secure website)

Customer Care at The Co-operative Food

This intern report was compiled by Ash Assif in December 2013 at the request of Eilidh McGregor, Team Leader (Training) at MacTaggart Consulting. Its aim is to evaluate the customer care strategy at The Co-operative Food and make proposals for improvement.

1. Introduction

Good customer service is essential in a local food store, where customers return regularly and form personal relationships with the staff. Small Co-op stores, however, are part of a much bigger entity with a strategy encompassing several businesses (including banking, funeral care, electrical, estates, pharmacy, travel and legal services).

The Co-op is therefore a huge organisation at the same time as a local one. It is 'a co-operative', jointly owned by over six million individual members and about 80 Independent Co-operative Societies. It places a high premium on ethical trading.

With easy access to a local store and the opportunity to talk to the manager (as well as shop there in person), this was judged an interesting and appropriate subject for analysis.

2. Customer Service Standards at the Co-op

2.1 Strategy statement

The Co-op's 2012 'Customers' report emphasises customer satisfaction as 'a strategic priority' in the following context:

Today's consumers have more choice than ever before, with faster access to higher-quality, good-value products and services. Yet despite this, at the end of 2011, the confidence of UK consumers reached its lowest point in three years, amid continued economic uncertainty. A slight increase of confidence through 2012 has not altered the general consensus that economic recovery remains poor. With this in mind, to achieve sustainable commercial success, it is vital to nurture customer loyalty and support through excellent customer care, service and offering, whilst recognising the importance of emotional attachment to a brand.

This policy document makes it clear that the Co-op intends not only to meet but also 'exceed' needs of customers, one of the key principles of good customer care. They are aware of the need to engender customer loyalty through customer satisfaction. They also develop loyalty through annual dividends paid to members.

The annual report for 2012 says: 'In the midst of this recession it will be vital that we continue to offer good value as well as good values and ensure that our customer service remains high'. The interim report for 2012 states the 'new vision and strategy for our business' is 'putting the customer at the heart of everything we do.'
Increasingly the Co-op attempts to engage customers and encourage loyalty nationally through social networks. @CooperativeFood has currently 32.7K followers and the FaceBook page (regularly updated with news snippets and competitions) has 55,673 'likes'.

2.2 Meeting needs of customer locally

Local foodstores cater for local purchases. Many customers will visit bigger stores (such as Asda) for main shopping, but they will return to local premises for regular smaller purchases.

Good customer interaction from Co-op staff (in terms of friendliness, warmth, knowledgeability about products, helpfulness and personal interest) is crucial to ensure they return. Local staff training helps to support these standards. Quality relationships with local customers contributes to job satisfaction for staff and high morale.

2.3 Internal and external customers

Staff working in the shop are also Co-op customers in that they purchase goods from the store but may be customers of other Co-op business, eg Funeral Care or Banking. Consumer panels, made up of customer-employees, play an important role in giving feedback on goods. There is a chain of service with various suppliers, including the Co-op's own delivery service.

2.4 Handling Complaints

Most complaints about product quality are resolved locally. The store operates a policy of instant exchange or refund where a customer finds a product unsatisfactory, whatever the reason. Personal observation of an instance where someone returned some cooked chicken suggests staff are skilled at handling such interactions. They listen, empathise, apologise (whatever they may think in private), ask questions to clarify the situation, and offer a solution. In terms of aftercare, when the customer returns, they will check that the solution (usually an exchange) proved satisfactory.

More complex complaints (these are rare) are passed to central Customer Relations, which takes feedback via telephone, post or email. This apparently works less well. An email sent to them for information while compiling this report received only an automated response (see Appendix A).

2.5 Qualitative and quantitative feedback

The Co-op introduced the Customer Satisfaction Index (CSI) in 2010 as their key measure of satisfaction. It assesses to what extent they are 'doing best what matters most to customers'. According to the 211 report, between 500 and 600 customers (Food, Pharmacy and Life Planning) were surveyed every month and asked to register satisfaction on a ten-point scale, a quantitative method.

Chip and pin terminals are used to gather feedback on customer service, a software system called 'Insight'. For example, customers are invited to answer the question 'Were we friendly and helpful?' Total responses to this in 2011 were 485, 876, giving 94% positive responses.

Central data on customer behaviour is obtained through use of member cards at the till, though not all customers are members.

Further qualitative research is carried out by a consumer panel of over 2000 employee-customers.

The Co-op has scores and targets each year for Customer Satisfaction, Customer Relations and Customer Engagement. They publicly record these, comment on progress and make adjustments where targets are not met. For example, the customer satisfaction target for 2011 was 80.6% but the actual achievement was 78.3%. The revised target for 2013 is 74% (oddly lower than the achievement in 2011) and significantly lower than the target for all the other Co-op Businesses). The Co-op suggests they are adopting a new methodology for measuring customer satisfaction in the food stores in 2013. Areas indicated for improvement by customers surveyed include 'value for money and product availability/range'.

2.6 Customer Engagement

Apart from good human interaction with service personnel in shops, the Co-op sees new technology as key to improving engagement, with an emphasis on 'enhancing consumers' ability to make ethical choices'. In the 2012 annual report, they say 'Membership engagement lies at the heart of our business. We aim to increase our membership to 20 million in the coming years. However, the key is not the quantity, but the quality of relationships forged. The more engaged our members, the more successful our business.'

2.7 Problems

The Co-op was faced with two significant problems in 2013. First the well publicized problems at the Co-op Bank, resulting in the resignation of its Chairman, were highly damaging to a brand placing emphasis on ethical conduct.

Secondly there was the decision not to pay the usual December dividend to Co-op members because of poor financial performance during the year. This presented a challenge for staff working in food stores, who needed to continue to make customers feel valued.

3. Evaluation

3.1 Standards

The standards set by The Co-operative Food are well-expressed and ambitious: 'putting the customer at the heart of everything we do'. (This has more impact than claims from another leading customer service organisation that 'through dealing honestly with customers that we can earn their trust and loyalty.') It is not far from Tesco's policy statement: 'No-one tries harder for customers'. However, marketing statements are not always consistent with actual practice. In this case, the Assistant Manager interviewed at a local Co-op store (see Appendix B) came out with the statement 'putting the customer at the heart of everything we do' spontaneously and with conviction.

The Co-op 'Vision' ('To build a better society by excelling in everything we do'), sounds good but recent public scandal has undermined its credibility.

Conclusion: The Co-op is implementing appropriate standards in difficult times. Good quality customer service standards, strengthened by good staff training in customer service, can succeed in putting 'the customer at the heart of everything we do'. The 'quality of the relationship' mentioned in the annual report is fundamental.

3.2 Efficiency and effectiveness

As mentioned previously, customer satisfaction in Co-op foodstores dropped in 2012, failing to meet the target set and resulting in a revised lower target. The new chief executive plans to improve matters via appropriate 'price architecture', reduced costs, and better own brand products. In published documents there is no mention of customer service as a key element. Apparently concern about high prices was a key issue in customer responses. It is interesting to see that the overall drop in customer satisfaction is offset by the smaller stores which experienced 'a 1.9% bounce'. It seems that high quality customer service in smaller stores, where customer loyalty relies heavily on relationships, has a beneficial pay-off.

The Co-op's own customer satisfaction rating, however, was far higher than the one carried out by *Which?* in 2012, which gave it 3 (out of 5) stars for customer service and an overall score of 48%, in only eighth place of nine supermarkets surveyed. (Waitrose was highest with 82%.)

Conclusion:

The Co-op needs to improve customer satisfaction, though the situation in the small food stores is better than in bigger shops. Despite financial problems, it dealt with the difficulties over unpaid dividend efficiently and effectively. During the month of December 2013, customers are receiving a 10% discount coupon on purchases of over £5.00. Most agree (evidence is anecdotal) that this results in a higher benefit than the expected dividend. One local store reports increased custom and appreciation from customers.

The effect of brand damage from the recent failures of the Co-op Bank is at present impossible to assess. However, the Co-op has accepted responsibility and stayed consistent with ethical values:

> *openness – nobody's perfect, and we won't hide it when we're not*
> *honesty – we are honest about what we do and the way we do it*

4. Proposals for continuous improvement

Between the recession and the problems associated with the Co-op bank, the Co-operative Food has had a challenging year. However, the emphasis on 'the customer at the heart of everything we do' should stay central.

The Co-op is rightly paying close attention to customer feedback and initiating action as a result of customer views. Local views from customers should continue to be collected and valued, not just national responses. Formal feedback on views locally collected, with local managers empowered to respond, can lead to better service, with expectations not just met but exceeded.

Customer Relations nationally should review responses to email communication. Clear standards should be set for time of response, action taken, and follow-up.

In terms of current initiatives, staff training in first class customer care should continue to be as important as adjustments to price structure and costs. Staff in food stores (who are usually customers in those stores as well as members of The Co-op) need to feel valued and supported. They will then pass on a sense of optimism and respect to the customer, crucial in the current economic climate.

[1799 words]

References

- Brooke, Beth 'Co-op Bank admits brand damage as account closures rise' in *The Grocer,* 28 November, 2013, available from http://www.thegrocer.co.uk/companies/co-op-bank-admits-brand-damage-as-account-closures-rise/352143.article accessed 7 December, 2013
- *The Co-op Annual Report 2012*, available from http://www.co-operative.coop/Corporate/PDFs/Annual-Report/2012/TCG_Annual-Report-2012.pdf), accessed 5 December, 2013
- 'The Co-operative Group Vision and Aims', available from http://www.co-operative.coop/corporate/aboutus/ourvisionandaims/, accessed December 2, 2013.
- *The Co-op Interim Report, 2012*, available from http://www.co-operative.coop/PageFiles/5451/cooperative_interim_report_2012.pdf), accessed 5 December 2013
- Interview with Manager of Local Co-op Food Store, Mrs H Moray (see Appendix B), carried out 2.12.2013
- *John Lewis Partnership*, (for Waitrose statement of standards) available from http://www.johnlewispartnership.co.uk/csr/our-customers.html, accessed 6 December, 2013

- Lawson, Alex, 'Analysis: Co-op food boss Steve Murrells puts price, store format and own brand at heart of revival plan' in RetailWeek 23.08.2013, available from http://www.retail-week.com/sectors/food/analysis-co-op-food-boss-puts-price-store-formats-and-own-brand-at-heart-of-revival-plan/5052366.article accessed 7 December, 2013
- 'Tesco Core Purpose and Values', available from http://www.tescoplc.com/index.asp?pageid=10 , accessed 7 December, 2013.
- *Which?* 'Best and worst supermarkets: the Co-operative', July 2013, available from http://www.which.co.uk/home-and-garden/leisure/reviews-ns/best-and-worst-supermarkets/the-co-operative/ accessed 7 December, 2013.

Appendix A

Email sent to customer.relations@co-op.co.uk
7.12.2013

Dear Customer Relations

I am carrying out some research into customer care strategy in Co-op foodstores.

I have looked carefully at all the information on your website, and in particular at the Co-op Customer Satisfaction pdf report from 2012.

I wonder if you have any other information on customer service, such as guidelines for new staff training to work in your stores?

I can't see a complaints policy on the website and I wonder whether you have one.

If you have any printed material that might be relevant to me, I would be very grateful.

Yours sincerely (and a Co-op member myself)

Ash Assif

Reply from customer.careline@co-operative.coop
7.12.2013
This is an automated reply. Thank you for your message which we will endeavour to respond as soon as possible, however, we are currently experiencing some delays so responses are taking slightly longer than usual and we thank you for your patience whilst your enquiry is investigated.

We appreciate that some enquiries may require urgent attention. If you wish to discuss the matter with one of our Customer Careline Team urgently, please call us on Freephone 0800 0686 727. When calling please ensure that you mention if you have previously sent an email so that this can be referred to at the time of your call. Please note it is not necessary to phone the number shown above unless you need to speak to us immediately about an urgent matter.

Our opening hours are:
9am - 8pm Monday to Friday
9am - 5pm Saturday and Sunday
Kind regards, The Co-operative Food Customer Careline Team

Appendix B
Questions for Co-op Manager (local store), with responses

1. Roughly what proportion of customers would you say are Co-op members?
A lot of them are and if they're not we always ask them if they'd like to join and we have questionnaires that make it easy for them to apply.

2. What is the policy on returned goods?
We replace the faulty item or give the customer their money back. Also we talk to them afterwards (if we know them) to make sure the replacement was okay.

3. What is the policy on complaints (eg about the shop or staff, as opposed to goods)?
If we can't resolve these on the spot, via the Manager or Assistant Manager, we refer them to Customer Relations. They can phone, write or email.

4. What sort of training do staff have in customer service?
We do have regular training and we have a customer care policy: it's on the computer in the staff room. What we believe is this: 'the customer is at the heart of everything'.

5. How have customers reacted to the fact of getting no dividend this December? Have the discounts on purchases proved an acceptable alternative?
Most people are really pleased. They say they're getting more money back this way, and at the same time it encourages people to buy, so it's a win win situation.

6. The Co-op is known for its commitment to the community, and in supporting local charities and good causes, sometimes using its Community Fund. How has that been put into practice in this store?
We give raffle prizes for local organizations raising money. We sell books to raise money for a local charity. Sometimes we sell raffle tickets to support local causes.

7. Are there any perks or advantages to staff of working in the store?
Staff have a discount to purchases in shop. Most live nearby and hours are flexible.

8. How close to the store do most staff live?
Most of them live very near.

9. How many staff are employed in the store?
There are 15, including a Manager and Assistant Manager. They work shifts and many are part-time. The Assistant Manager worked for the Co-op for 19 years. She started part-time after the birth of her daughter and worked her way up. She says she gets a lot of job satisfaction because of the way you get to know local customers, their families and what's happening to them.

Tasks 3(a) and (b) Exemplar Learner Record

<table>
<tr><td colspan="4">DE3N 34 Communication: Analysing and Presenting Complex Communication Outcome 2

H1F0 34 Creating a Culture of Customer Care
Outcome 1 and Outcome 2</td></tr>
<tr><td>Class</td><td>HND Business</td><td>Group</td><td>2</td></tr>
<tr><td>Learner's name</td><td>Ash Assif</td><td>ID no.</td><td>77892</td></tr>
<tr><td colspan="4">DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 2 — Produce complex written business documents</td></tr>
<tr><td colspan="4">Portfolio documents:
Task 3(a) — Analysis of factors contributing to a culture of customer care
Task 3(b) — Customer Care at The Co-operative Food</td></tr>
</table>

Evidence requirements	Achieved Y/N	Comments
♦ **effective selection/collation of information**	Y	Selection intelligent and closely matched to requirements of task.
♦ **accurate, relevant information**	Y	Task (b) accurate and fully relevant, clearly referenced.
♦ **logical structure appropriate for purpose/readership**	Y	Structure for both tasks logical in terms of remit and suited to intended reader.
♦ **effective language and register**	Y	Formal and businesslike register in Task (b) — well done!
♦ **consistently accurate layout and format**	Y	Thoughtful and consistent layout in both tasks, easy to read and understand. Coloured headings in your Co-op Food report are really effective.
♦ **consistently accurate spelling, syntax and punctuation**	Y	Completed to a high standard.

Assessor's feedback

Good work! Would like to have seen more discussion of your local interview results but you certainly covered all necessary points. You didn't need to use Task a) to contribute to the word count of your portfolio, but it also met the necessary standard for expression and accuracy.

Unit and Outcome	Achieved Y/N	Assessor's signature	Date
Communication: APCC DE3N 34 Outcome 2	Yes	Eilidh McGregor	21.01.2014

H1F0 34 Creating a Culture of Customer Care
Outcome 1: Analyse factors contributing to a culture of customer care
Outcome 2: Evaluate the customer care strategy of an organisation

Outcome 1: The analysis should be based on **recognised principles of customer care.** It should incorporate **valid and convincing reasons** which highlight the importance of each of the following aspects of customer care:

Evidence requirements **Task 3(a) Analysis: key factors**	**Achieved Y/N**	**Assessor comment/feedback**
♦ **Identifying and meeting the expectations of key customers.**	Y	Clearly explained. Good on supply chain and internal/external customers.
♦ **Dealing with two different types of customer care problems.**	Y	SMART targets good! At least 2 valid types of problem discussed.
♦ **Maintaining customer aftercare.**	Y	Good, intelligent overview.
♦ **Obtaining and monitoring qualitative and quantitative customer feedback.**	Y	Well reasoned discussion with good examples.

Outcome 2: The evaluation should **refer to recognised principles of customer care** and apply them in the context of a specific organisation. It should include:

Evidence requirements **Task 3(b) Evaluative report**	**Achieved Y/N**	**Assessor's comment/ feedback**
♦ **a judgement on the suitability of the standards for customer care which have been set by the organisation**	Y	Covered in 3.1 and 3.2. Good point about difference between Co-op's own rating and Which?'s rating.
♦ **a judgement of the effectiveness and efficiency of the organisation's customer care strategy**	Y	Section 3.2 is a succinct but accurate discussion of overall effectiveness.
♦ **proposals on ways to ensure continuous improvement of customer care in the organisation**	Y	Section 4 of your report makes appropriate proposals. Well done.

Asssessor's feedback
Your references and intelligent analysis show you carried out a lot of research & applied your knowledge of recognised customer care principles, such as the importance of not only meeting but exceeding expectation in a competitive environment. Good quality of formal writing across the documentation.

CC Customer Care H1F0 34 Outcome 1	Y	E. McGregor	21.01.2014
CC Customer Care H1F0 34 Outcome 2	Y	E. McGregor	21.01.2014

Blank Recording Documents

Task 1 Learner Checklist and Record

DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 1 — Analyse Complex Written Business Information

Class		**Group**	
Learner's name		**ID no.**	

Evidence requirements	**Achieved Y/N**	**Comments**
Summarise the main points and supporting detail		
Evaluate the effectiveness of format, language, structure and layout in meeting the needs of purpose and readership		
♦ **format**		
♦ **language**		
♦ **structure**		
♦ **layout**		
Assessor's feedback		

Unit and Outcome	**Achieved Y/N**	**Assessor's signature**	**Date**
Communication: APCC DE3N 34 Outcome 1			

Task 2 Learner Checklist and Record

<table>
<tr><td colspan="4">DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 3 — Organise and participate in a formal meeting</td></tr>
<tr><td>Class</td><td></td><td>Group</td><td></td></tr>
<tr><td>Learner’s name</td><td></td><td>ID no.</td><td></td></tr>
<tr><td>Names of other participants

Name of Chair</td><td></td><td>Date of meeting</td><td></td></tr>
</table>

Evidence requirements (oral)	**Achieved Y/N**	**Detailed observation/ comment**
Agenda item prepared and presented accurately and effectively. Effective preparation may include: ♦ **detailed research** ♦ **selection of relevant data** ♦ **sound conclusions** ♦ **effective sequencing** ♦ **signposting** ♦ **confident, clear delivery** ♦ **effective use of planning notes**		
Learner uses appropriate tone, pace and non-verbal communication. Evidence of achievement might include: ♦ **tone and pace adjusted for purpose and audience** ♦ **clear and audible voice** ♦ **eye contact** ♦ **interested expression** ♦ **confident open posture**		

Learner responds to others to progress interaction by, for example: ♦ **giving and receiving information** ♦ **listening attentively** ♦ **use of open questions** ♦ **responding constructively to others** ♦ **giving and receiving positive feedback**		
Evidence requirements (written)	**Achieved Y/N**	**Comment**
♦ **notice of meeting (email)**		
♦ **agenda for meeting (may be included in email notice)**		
♦ **preparation notes for agenda item**		
♦ **written record of meeting**		
Is recording of meeting available?		

Unit and Outcome	**Achieved Y/N**	**Assessor's signature**	**Date**
Communication:APCC DE3N 34 Outcome 3			

Tasks 3 Learner Checklist and Record

DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 2

H1F0 34 Creating a Culture of Customer Care
Outcome 1 and Outcome 2

Class		**Group**	
Learner's name		**ID no.**	

DE3N 34 Communication: Analysing and Presenting Complex Communication
Outcome 2 — Produce complex written business documents

Portfolio documents:
Task 3(a) — Analysis of factors contributing to a culture of customer care
Task 3(b) — Customer Care at The Co-operative Food

Evidence requirements	Achieved Y/N	Comments
♦ **effective selection/collation of information**		
♦ **accurate, relevant information**		
♦ **logical structure appropriate for purpose/readership**		
♦ **effective language and register**		
♦ **consistently accurate layout and format**		
♦ **consistently accurate spelling, syntax and punctuation**		

Assessor's feedback

Unit and Outcome	Achieved Y/N	Assessor's signature	Date
Communication: APCC DE3N 34 Outcome 2			

H1F0 34 Creating a Culture of Customer Care
Outcome 1 — Analyse factors contributing to a culture of customer care
Outcome 2 — Evaluate the customer care strategy of an organisation

Outcome 1 — The analysis should be based on **recognised principles of customer care.** It should incorporate **valid and convincing reasons** which highlight the importance of each of the following aspects of customer care:

Evidence requirements **Task 3(a) Analysis: key factors**	**Achieved Y/N**	**Assessor's comment/feedback**
♦ **Identifying and meeting the expectations of key customers.**		
♦ **Dealing with two different types of customer care problems.**		
♦ **Maintaining customer aftercare.**		
♦ **Obtaining and monitoring qualitative and quantitative customer feedback.**		

Outcome 2 — The evaluation should **refer to recognised principles of customer care** and apply them in the context of a specific organisation. It should include:

Evidence requirements **Task 3(b) Evaluative report**	**Achieved Y/N**	**Assessor's comment/feedback**
♦ **a judgement on the suitability of the standards for customer care which have been set by the organisation**		
♦ **a judgement of the effectiveness and efficiency of the organisation's customer care strategy**		
♦ **proposals on ways to ensure continuous improvement of customer care in the organisation**		

Asssessor's feedback			
Unit and Outcome	**Achieved Y/N**	**Assessor's signature**	**Date**
CC Customer Care H1F0 34 Outcome 1			
CC Customer Care H1F0 34 Outcome 2			

Unit Learner Checklist and Record

Learner's name					
Learner's ID					
Learner's Group/Class					
Unit	**Outcome**	**Assessment**	**Achieved/Not Achieved (A/NA)**	**Assessor's signature**	**Date**
DE3N 34 Communication: Analysing and Presenting Complex Communication	**1**	**Task 1**			
	2	**Task 3(a)/3(b)**			
	3	**Task 2**			
H1F0 34 Creating a Culture of Customer Care	**1**	**Task 2**			
	2	**Task 2**			

Class Assessment Record

Unit	Outcome	Assessment
DE3N 34 Communication: Analysing and Presenting Complex Communication	1	Task 1
	2	Task 3
	3(a)/(3)b	Task 2
H1F0 34 Creating a Culture of Customer Care	1	Task 2
	2	Task 2

Class					
Tutor/Assessor					
Learner	Assessment Task 1	Assessment Task 2	Assessment Task 3a	Assessment Task 3b	Comments

Achieved/Not Achieved — (Enter A or NA in the box to indicate whether the learner has achieved or not achieved each Outcome. The comments column can be used to highlight any re-assessment that may be needed.)

History of changes

Version	Description of change	Date

Acknowledgements

SQA acknowledges the valuable contribution that Scotland's educational institutes have made in the development of qualifications.