

SQA Advanced Unit Specification

General information for centres

Unit title: Creating a Culture of Customer Care

Unit code: HP73 47

Superclass: BA

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Version: 01

Unit purpose

The purpose of this Unit is to enable candidates to recognise and evaluate effective customer care within a relevant work environment. It allows candidates to analyse factors affecting customer care and to judge the effectiveness of a customer care strategy by applying them to the workplace. The Unit emphasises that customer care is a key area of importance and value to organisations and is, therefore, critical to the work of any employee.

On completion of the Unit the candidate should be able to:

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

Recommended prior knowledge and skills

It is recommended that candidates undertaking this Unit possess good communication skills to a level equivalent to at least SCQF level 6.

Credit points and level

1 SQA Credit at SCQF level 7: (8 SCQF credit points at SCQF level 7*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from National 1 to Doctorates.*

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Core Skills

Opportunities to develop aspects of Core Skills are highlighted in the Support Notes of this Unit specification.

There is no automatic certification of Core Skills or Core Skill components in this Unit.

Context for delivery

If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

The assessment exemplar for this Unit provides assessment and marking guidelines that exemplify the national standard for achievement. It is a valid, reliable and practicable instrument of assessment. Centres wishing to develop their own assessments should refer to the assessment exemplar to ensure a comparable standard. Assessment exemplars are available on SQA's secure website.

Unit specification: statement of standards

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The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory. Please refer to *Knowledge and/or Skills for the Unit* and *Evidence Requirements for the Unit* after the Outcomes.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Candidates should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

Outcome 1

Analyse factors contributing to a culture of customer care.

Knowledge and/or Skills

- ◆ Meeting customer expectations
- ◆ Dealing with customer care problems
- ◆ Customer aftercare
- ◆ Obtaining and monitoring qualitative and quantitative customer feedback

Outcome 2

Evaluate the customer care strategy of an organisation.

Knowledge and/or Skills

- ◆ Standards for customer care
- ◆ Continuous improvement of customer care

Evidence Requirements for the Unit

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can analyse factors which contribute to a culture of customer care and apply these to evaluate the strategy for customer care in a particular organisation/work situation, which may be real or hypothetical.

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:

- ◆ Identifying and meeting the expectations of key customers.
- ◆ Dealing with **two** different types of customer care problems.
- ◆ Maintaining customer aftercare.
- ◆ Obtaining qualitative and quantitative customer feedback.
- ◆ Monitoring customer feedback.

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

- ◆ 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.

Both judgements should be based on valid and convincing reasons and with examples drawn from the organisation. Each judgement should also arrive at a clear conclusion. The proposals should take into account the conclusions from the judgements and should be realistic and practicable in terms of the organisational/work related context to which they relate.

Unit specification: support notes

Unit title: Creating a Culture of Customer Care

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

Guidance on the content and context for this Unit

The Unit is part of a wide range of SQA Advanced Group Awards (such as Management; Travel and Tourism; Retail Management; Business etc) and is designed to provide candidates with knowledge and understanding to recognise and evaluate customer care within a relevant work environment. Where candidates are employed, they will be able to apply their analysis to real work situations.

The Unit is intended to highlight the crucial role of customer service in organisations and the role that employees throughout organisations can play in developing and maintaining a culture which aims to meet the needs and expectations of all customers — internal and external. However, it is not necessary that those undertaking this Unit have direct operational experience of customer service, although it would be suitable for those who do have such experience as they could reflect upon this while undertaking the Unit.

The Unit is relevant to customer service in all types of organisations and thus includes organisations of different size, public and private organisations, and organisations operating in different markets.

Throughout the Unit the emphasis should be on the practical application of customer care ideas and theories within the workplace.

Outcome 1

This Outcome deals with principles of customer service. The main focus is on the impact that these principles can have on an organisation, as well as what makes the difference between **acceptable** service and **excellent** service. Both internal and external customers can be considered and the distinction between customer service and customer care can be explored.

Key principles of customer care include:

- ◆ Knowing your customers.
- ◆ Meeting and exceeding your customers' needs.
- ◆ Engendering customer loyalty through customer satisfaction.
- ◆ Establishing relationships and building rapport with customers. This can be explored through an exploration of different types of communication used in customer contact, eg face to face; telephone; written communication (both traditional and electronic); body language; active listening skills; effective questioning techniques; and discussing the need for and benefit of empathy.
- ◆ Knowledgeable staff including the ways in which staff can gain knowledge of the organisation's products and/or services.

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- ◆ Customer satisfaction — and when and how customer loyalty can be established. It may be useful to examine the difference between customer satisfaction and customer loyalty.

Methods of gathering feedback and the different types of feedback, ie qualitative and quantitative, can be reviewed. These could cover customer surveys of various kinds (either conducted by the organisation itself or by others); recording of customer complaints; data on behaviour such as return customers and churn; results from mystery shoppers; etc. Monitoring feedback can include ways of storing and using feedback and incorporate the increasing role that technology plays in actively improving customer care.

Contrasts can be drawn between examples of customer care where both management and staff have encompassed their organisation's customer care policies and other examples where this has not been the case. Candidates can review the differences and conclude where the benefits lie. This could be done through examining a range of customer care problems and considering appropriate methods of aftercare.

Outcome 2

This Outcome involves the application of the principles examined in Outcome 1. It allows candidates to look at continuous improvement of customer care standards in a familiar organisation/work situation. Wherever possible, use should be made of current industry standards; mission statements and benchmarking or levelling of appropriate standards.

Guidance on the delivery of this Unit

This Unit can be delivered through lecturer-mediated discussion. This may be in a traditional face-to-face environment or using a virtual learning environment or by various combinations of the two such as classroom interaction augmented by an online forum.

The choice of delivery methods for the Unit is particularly important as the Unit lends itself to learning and teaching approaches which make it possible for candidates to produce suitable assessment evidence as they work through the Unit. Candidates could, for example, be encouraged to write a blog or maintain a learning diary. They could, as an integral part of the learning and teaching process, be given guidance on how to structure and organise their material so that it is in a form which can easily be presented for assessment purposes.

Hence, in devising suitable delivery methods, it may be helpful to bear in mind that evidence for assessment can be generated in many different ways, including:

- ◆ Presentations and other non-written assessments such as group presentation; individual presentation; production of artefact (eg poster, video, audio); role play; debate and discussion; residential periods.
- ◆ Assignments, eg e-portfolios; learning journals; project documentation; diaries; reading logs; blogs; and reflexive notebooks.
- ◆ Collaborative work, eg projects; posters; events; work experiences; residential exercises and field events.
- ◆ Making use of technology, eg blogs; wikis; social media tools; VLE, e-portfolios.

Methods such as those above link learning and teaching methods directly with the generation of assessment evidence so that they become part and parcel of the same thing.

The categories are not mutually exclusive, eg a VLE may be used as a vehicle for debate and discussion.

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Delivery should enable candidates to become familiar with the key principles which underpin excellent customer service. All of these can be illustrated by examples and candidates can also be encouraged to draw on their own experiences as customers and relate these to their experiences of working in organisations. Candidates could share information on their experiences through participation in an online forum or through debate and discussion in a class group. There may be opportunities to further develop these, eg through short presentations to a class group or online presentations.

Candidates should be encouraged, therefore, to apply the principles of customer service to actual situations and draw conclusions from this. In particular they can be encouraged to consider the efficiency and effectiveness of customer service and ways in which customer service can be improved and how any improvements can be maintained and further extended.

It would be possible as part of the delivery process to get candidates to devise a customer service strategy for an organisation. This could be done after candidates have become familiar with the principles of good customer service. The organisation could be real or hypothetical and candidates could work individually, in pairs or in small groups. If desired, the end product could be a wiki.

Candidates could use the customer service strategy as the basis for gathering assessment evidence for Outcome 2. In this way delivery and assessment could be closely linked.

Guidance on the assessment of this Unit

This Unit lends itself to holistic assessment. The two Outcomes and their associated Knowledge and/or Skills items in this Unit are very closely linked: analysis of the factors contributing to a culture of customer care can provide the basis for evaluating a customer care strategy.

If at all possible, the method of assessment should combine both Outcomes. The second Outcome requires candidates to evaluate a customer care strategy in an organisation. This can refer to an organisation as a whole or to any part of it. For example, candidates in employment could use their own area of work if they wish and if it would allow them to generate suitable and sufficient evidence. Alternatively they could work with case study material which could refer to one or more organisations. It is important to stress that the organisations may be real or hypothetical. It would be possible for candidates to generate evidence in both types of situations. For example, they could base their analysis on an actual organisation but evaluate a customer care strategy based on a hypothetical organisation. This customer care strategy for a hypothetical organisation could be one to which they have contributed — see guidance on the delivery of this Unit above.

Candidates may generate evidence for this Unit in a number of different ways and should be encouraged to provide evidence in a format which suits their particular situation.

Candidates could generate evidence during the delivery of the Unit and gather it together in a portfolio which, providing they have access to suitable systems, they could manage electronically. Sources of suitable evidence for portfolios could include:

- ◆ Personal statements by candidates in response to learning and teaching exercises.
- ◆ Contributions by candidates to discussion forums and/or to social networking sites.
- ◆ Wikis developed by candidates.
- ◆ Extracts from a blog or blogs produced by candidates.

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The above could stem directly from activities which form part of a learning and teaching programme but evidence may also be available from a candidate's place of work or from other sources. In addition, it might be possible to generate evidence through residential periods or 'away days'.

A viva or mini-viva could be used to supplement and/or augment portfolio evidence which could also incorporate peer assessment and evidence generated through collaborative work such as a poster display of customer service concepts and principles.

A portfolio based approach can make it easier for candidates to make use of the same item of evidence in different contexts. For example, within the SQA Advanced Certificate Management Group Award, a candidate with operational experience in customer service (or with good knowledge of how customer service works in an organisation) may be able to use the same evidence for part of this Unit and part of the SQA Advanced Unit *Managing Operational Resources*.

If desired, it would be possible to assess this Unit by generating assessment towards the end of the Unit — again using an assessment instrument which is designed to generate evidence for both Outcomes. This could be achieved by a narrative report which evaluates a customer care strategy but makes use of factors contributing to good customer service to provide justification and support for the evaluation. The report could be based on a candidate's place of work although it would be possible to make use of a case study which could refer to a hypothetical or an actual situation. Candidates could be given a set of questions or headings to assist them in structuring their response. This could help them to ensure that their work generated is sufficient and suitable to meet all the Evidence Requirements. Candidates could present their work in a traditional report format but they do not have to do this, eg they could organise their evidence in an electronic slide presentation which could include video and audio.

It is also possible to assess Outcomes 1 and 2 separately. This might be a suitable approach where candidates are new to customer service and need to spend some time assimilating the principles underpinning excellent customer care and the factors which contribute to a customer care culture. In these circumstances:

- ◆ Outcome 1 could be assessed by a series of questions which covered all the Knowledge and/or Skills items. Candidates could provide their responses in a number of different formats such as a poster presentation and also involve some form of peer assessment.
- ◆ Outcome 2 could also be assessed by candidate response to questions, possibly linked to a case study of an organisation. Again, there is a range of available formats which candidates could use to present their responses.

Online and Distance Learning

The above guidance on delivery and assessment indicates there are considerable opportunities for Online and Distance Learning and Assessment in this Unit. In addition material prepared by the SQA to support this Unit is available in electronic format.

It is possible, therefore, to co-ordinate a learning and teaching/assessment programme through a VLE which would, if desired, also allow geographically dispersed candidates to initiate, develop and maintain contact with each other. The SQA support material also allows for a more traditional distance learning approach for candidates who prefer to learn in this way.

Opportunities for the use of e-assessment

As noted above, e-assessment may be particularly appropriate for 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 candidate evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. Further advice is available in *SQA Guidelines on Online Assessment for Further Education (AA1641, March 2003)*.

Opportunities for developing Core Skills

Depending on the learning and teaching/assessment approaches adopted, both Outcomes of this Unit provide opportunities for developing the three components of the Core Skill of *Communication* at SCQF level 6. Outcome 2 also provides opportunities for developing the following components of the Core Skill of *Problem Solving* at SCQF level 6: Critical Thinking; Reviewing and Evaluating

Communication: Oral Communication at SCQF level 6

Candidates may be asked to give a presentation on their experiences of aspects of customer service work to other members of the group in a manner which conveys essential information and ideas. This is a complex topic, especially if it involves the application of principles of customer service. Candidates may also respond to questions or queries from others. Candidates may also contribute to debates and discussions or participate in a viva, all of which will require them to use vocabulary, register and sentence structure appropriate to the audience involved.

Communication: Written Communication (Reading) at SCQF level 6

In order to complete the Unit, candidates will have to become familiar with current ideas of excellent customer care and how this can be implemented. This will require them to read written text which explores customer services issues and which is likely to include detailed argument for or against particular aspects of customer service. They may well summarise their understanding by posting messages to others through a VLE or in a blog or in a written report produced for assessment purposes.

Communication: Written Communication (Writing) at SCQF level 6

In order to complete the Unit, candidates will have to generate evidence to demonstrate that they have achieved both Outcomes. This could take the form of a management report in which they will be expected to present their analysis in a suitable manner using a recognised format. There are alternative ways to present written evidence such as by personal reports or by contributions to an online forum. Whatever approach is adopted, candidates will be required to organise a substantial body of material and make use of complex language and specialist vocabulary.

Problem Solving: Critical Thinking at SCQF level 6

In order to complete Outcome 2, candidates will have to identify those factors in customer service which will enable them to evaluate the customer care strategy of an organisation. They will have to assess the relevance of these factors and apply customer service principles to judge the efficiency and effectiveness of the strategy and make proposals for

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ensuring continuous improvement. In this way they will develop and justify an approach relevant to the organisation.

Problem Solving: Reviewing and Evaluating at SCQF level 6

Also as part Outcome 2, candidates will have to evaluate the efficiency and effectiveness of standards of customer service and an organisation's customer care strategy. To do this, they will require to make use of suitable evidence and to draw conclusions on the basis of which they are expected to make proposals to ensure continuous improvement in customer care.

Equality and inclusion

This 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 www.sqa.org.uk/assessmentarrangements.

Administrative information

Version	Description of change	Date

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SQA acknowledges the valuable contribution that Scotland's colleges have made to the development of SQA Advanced Qualifications.

FURTHER INFORMATION: Call SQA's Customer Contact Centre on 44 (0) 141 500 5030 or 0345 279 1000. Alternatively, complete our [Centre Feedback Form](#).

General information for candidates

Unit title: Creating a Culture of Customer Care

This is a 1 SQA Credit Unit (8 SCQF credit points) at SCQF level 7 and is designed to enable you to recognise and evaluate effective customer care within a work environment. You will analyse factors affecting customer care and judge the effectiveness of a customer care strategy by apply them to a given workplace. Customer care is a key area of importance and value to organisations and therefore is critical to the work of every employee.

The Unit has two Outcomes:

- ◆ The first Outcome focuses on the analysis of the factors which contribute to a culture of customer care and it deals with the main principles underpinning high standards of customer care.
- ◆ In the second Outcome you will apply these principles to an organisation or part of an organisation and evaluate its customer care strategy.

The content of the Unit will be kept relevant through the appropriate use of examples and by focusing the areas of study on organisations relevant to you. This should provide you with the flexibility required to study, as appropriate, organisations of different size, public and private organisations, and those operating in different markets.

For successful completion of this Unit, you will be required to provide evidence that you can analyse the factors contributing to a culture of customer care and use these to evaluate the customer care strategy of an organisation — probably one which you know well. This will give you the chance to demonstrate the customer service concepts and principles that you have learned during the Unit. You can present this evidence in a number of ways such as a personal blog or a management report and you may well be able to generate suitable evidence from your learning as you work through the Unit. Your tutor will explain exactly what is expected of you.

You will complete the Unit if the evidence which you submit for assessment is considered satisfactory in terms of the standard set by the Unit.