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# Handbook

CSPD2 – VTCT (Skillsfirst) Level 2 Diploma in Customer Service Practice (RQF)

603/2352/8

Version 2.0

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# About Skillsfirst

VTCT is a market-leading Awarding, Assessment and End-point Assessment (EPA) Organisation offering vocational and technical qualifications in a range of 'services to people' sectors.

The VTCT group of companies are comprised of three innovative awarding brands: VTCT, ITEC and Skillsfirst. Together they have over 2,500 approved centres in over 40 countries across the world.

The qualifications suite offered by VTCT (Skillsfirst) spans a range of sectors including Childcare, Business Services, Health & Social Care, Recruitment and Social Media.

For more information visit us at [www.vtct.org.uk](http://www.vtct.org.uk) and [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk), contact our dedicated Customer Support Team via email at [customersupport@vtct.org.uk](mailto:customersupport@vtct.org.uk) and [customerservices@skillsfirst.co.uk](mailto:customerservices@skillsfirst.co.uk) or call 0121 270 5100

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# 1 Qualification at a glance

<b>Qualification title</b>	VTCT (Skillsfirst) Level 2 Diploma in Customer Service Practice (RQF)
<b>Qualification number</b>	603/2352/8
<b>Product code</b>	CSPD2
<b>Age range</b>	There are age limits attached to learners undertaking this qualification as this qualification is not approved for learners under the age of 16.
<b>Total Qualification Time (TQT)</b>	390
<b>Guided Learning (GL) hours</b>	231
<b>Assessment</b>	To be awarded this qualification, learners must successfully achieve the following assessments: <ul style="list-style-type: none"><li>• Portfolio of evidence</li></ul>
<b>Entry requirements</b>	There are no formal entry requirements for learners undertaking this qualification; however, centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.
<b>Support materials</b>	Support materials can be found on the website (if applicable)

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## 2 Qualification information

### 2.1 Qualification aim and design

This qualification has been designed to meet both employer and individual demand for learners to meet the knowledge and competences outlined in the Customer Service Practitioner Apprenticeship standard.

The primary target group for this qualification would be all Apprentices who are enrolled on a Customer Service Practitioner standard. As a 'stand-alone' qualification, however, it would also appeal to learners whose job role requires them to deliver continually improving service to customers. These learners may be in roles that carry a customer service specific job title, or their primary responsibility is to deliver excellent service to customers.

This qualification can also be used by learners who may not regard customer service as their primary responsibility, but recognise that customer service competencies are essential to complement their technical skills.

### 2.2 Progression opportunities

On completion of the VTCT (Skillsfirst) Level 2 Diploma in Customer Service Practice (RQF), learners may progress into employment or onto the following Skillsfirst qualifications:

- VTCT (Skillsfirst) Level 3 Diploma in Business Administration (RQF)
- VTCT (Skillsfirst) Level 3 Diploma in Customer Service (RQF)
- VTCT (Skillsfirst) Level 3 Diploma in Team Management (RQF)
- VTCT (Skillsfirst) Level 3 Diploma in Management (RQF)

or similar higher-level qualifications.

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## 3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 2 Diploma in Customer Service Practice (RQF) learners must achieve all mandatory units.

The minimum TQT required to achieve this qualification is **390**.

Product code	Unit title	Level	GLH	Unit reference number
<b>Mandatory units (Group M)</b>				
CPR1	Understanding the customer	2	35	R/616/3717
CPR2	Understanding the organisation	2	49	Y/616/3718
CPR3	Self-management	2	63	D/616/3719
CPR4	Supporting the customer focused experience	2	56	R/616/3720
CPR5	Communicating with customers	2	28	Y/616/3721

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# 4 Centre requirements

## 4.1 Resources

Centres must possess the physical resources needed to support the delivery of the programme and the assessment of knowledge and skills, which should therefore be of industry standard. Where specific resources are required these have been indicated in individual units.

## 4.2 Occupational expertise of those who deliver, provide expert witness, assess performance, moderate and verify assessments

This handbook provides details of the assessment strategy, which centres will need to apply in order to assess and quality assure the Level 2 Diploma in Customer Service Practice (RQF) and includes the:

- occupational expertise of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

## 4.3 Occupational expertise of deliverers, assessors, and moderators/internal verifiers

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent to make assessment judgements about the broad use of computerised payroll and accounting techniques either in the workplace or in Realistic Working Environments (RWE); and occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training delivered.
- have credible experience of providing training.

Assessors and internal verifiers must hold the relevant and equivalent qualifications (such as D32, D33, A1, A2 or Level 3 TAQA for assessors and D34, V1 or Level 4 TAQA for internal verifiers), or be working towards an appropriate TAQA or equivalent qualification. Centre staff should have verifiable relevant experience and current knowledge of the occupational working area at, or above, the level they are assessing or verifying. This experience and knowledge must be of sufficient depth to be effective and reliable when judging learner competence or verifying assessment processes and decisions. This could be verified by:

- curriculum vitae and references
- possession of a relevant qualification
- records of continuous professional development
- corporate membership of a relevant professional institution

Centre staff may undertake more than one role, e.g. tutor and assessor or internal verifier, but must never internally verify their own assessments.

#### 4.4 Employer direct model

Where employers opt for an 'employer direct' model, the qualification requirements for assessors and internal verifiers may be waived.

The employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of Skillsfirst may choose between:

- achieving the appropriate approved qualifications for assessment/verification
- or
- demonstrating that their (the employer's) training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by Skillsfirst as providing the equivalent level of rigour and robustness as achievement of the approved assessment/verification qualification.

Each application to use the employer direct model will be considered on an individual organisation and qualification basis and agreed by the qualification regulators, including the sector skills council. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the standards in association with Skillsfirst.

#### 4.5 Continuous professional development (CPD)

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD. Centres are also expected to support their assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Centres may have generic criteria and personnel specifications in addition to the above.

#### 4.6 Total Qualification Time (TQT)

Each qualification has a Total Qualification Time (TQT) value based on the total number of hours learning required to achieve it. The TQT value reflects the number of supervised learning hours required to achieve the knowledge and assessment requirements, plus the length of time a learner would need to take to achieve the skills and capabilities to be deemed competent. All RQF qualifications are subject to an evaluation process to determine their fitness-for-purpose.



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# 5 Assessment

## 5.1 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for each unit.

## 5.2 Assessment principles

Units will be achieved through the acquisition of evidence by the learner and submission to their assessor. Units may be assessed through a number of different sources and forms, which must meet the requirements of the skills and knowledge requirements.

- Assessment should normally be at the learner's workplace, but where the opportunity to assess across the range of standards is unavailable other comparable working environments may be used, following agreement from the External Verifier.
- A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks. e.g. If the learner is allocating work to their team, their communication skills and leadership style can also be assessed against both the units covering communication and leading people.
- Assessors can only assess in their acknowledged area of occupational competence.
- Assessors and IVs will be registered with their centre and be accountable to the organisation for their assessment practice.
- Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or verification activities does not feel that there is due regard to health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety is being taken.

## 5.3 Characteristics of assessment guidance

The learner may produce evidence from a range of examples (as outlined below) which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can meet all the learning outcomes of a unit and pass all the skills and knowledge requirements of a unit.

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

## 5.4 Types of evidence

Evidence is not required in any pre-set format and may be of many types and from diverse sources. Examples of types of evidence might include:

- learner statement
- notes
- review and tutorial records
- report
- diary
- worksheet
- audio/video recorded
- discussion/presentation/interview
- assessor observation
- witness statement
- product
- workbook

Please note that centres are not restricted to the types of evidence listed above.

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed.

## 5.5 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

### 5.5.1 Simulation

Simulation can only be used to assess learners where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. There are no units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

### 5.5.2 Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on learner's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards (NOS), such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

## 5.6 Recognition of prior learning (RPL)

RPL is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a component of a qualification through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

This evidence will need to be referenced clearly on recording documentation and will need to be appropriately authenticated and validated, perhaps by an employer or expert witness. Assessment must be valid and reliable to ensure the integrity of the award. The evidence gathered must meet the standards of the qualification or component and the assessment process must be subject to the same quality assurance procedures as any other assessment process.

In summary, evidence submitted to the RPL process must:

- be authentic and prove conclusively that RPL is based on the learner's own work;
- meet the requirements of the current the skills and knowledge requirements and be appropriate to the content of the component or qualification being considered for RPL;
- be sufficient to conclusively prove consistency of learner performance in meeting the skills and knowledge requirements.

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# 6 Units

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# Unit Handbook

## CPR1 – Understanding the customer

Unit reference number: R/616/3717

**Level: 2**

**Guided Learning (GL) hours: 35**

### Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of their customers and their needs and priorities and to utilise this knowledge to build a good customer rapport whilst managing customer expectations.

### Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Know customers

LO2 Build customer rapport

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# Unit content

## Assessment information

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

## Assessment guidance

**Customer expectations** are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service

Techniques to establish **customer rapport** may include:

- body language
- listening actively
- speech tone
- understand strengths and weaknesses of each other
- collaboration and partnership working
- build objectives and aims

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# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Know customers	1.1 Explain the distinctions between internal and external customers
	1.2 Describe the different types of customers
	1.3 Explain the different needs and priorities of customers

Learning Outcome	Assessment Criteria
LO2 Be able to build customer rapport	2.1 Describe the different types of customer expectations
	2.2 Describe methods of managing customer expectations
	2.3 Explain the importance of knowing how to adapt own style to build customer rapport
	2.4 Demonstrate a range of questioning skills, including listening and responding in a way that builds customer rapport

### CPR1 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager



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# Unit Handbook

## CPR2 – Understanding the organisation

Unit reference number: Y/616/3718

**Level: 2**

**Guided Learning (GL) hours: 49**

### Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of the values, culture and procedures within the organisation, as well as the regulations and legislation affecting customer service

### Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Know the values, culture and procedures within the organisation

LO2 Know the regulations and legislation affecting customer service

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# Unit content

## Assessment information

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

## Assessment guidance

**Core values** are the guiding principles that help to define how an organisation should behave in business and perhaps beyond, if they have an additional mission to serve the community. Core values are usually expressed in the organisation's mission statement.

A **service culture** is when staff in the organization take-on a customer-centric approach to their regular duties and work activities. It is defined as putting customer needs first when presenting solutions and providing support.

**Internal policies and procedures** should include any complaints processes and digital media policies that are relevant to the learner and the organisation

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# Learning outcomes

<b>Learning Outcome</b>	<b>Assessment Criteria</b>
LO1 Know the values, culture and procedures within the organisation	1.1 Explain the purpose of the business and what 'brand promise' means
	1.2 Describe the organisation's core values and how they link to the service culture
	1.3 Explain the organisation's internal policies and procedures and how these affect their job role

<b>Learning Outcome</b>	<b>Assessment Criteria</b>
LO2 Know the regulations and legislation affecting customer service	2.1 Describe the legislation and regulatory requirements that affect the business
	2.2 Explain own responsibility in relation to legislation and regulatory requirements
	2.3 Explain how to apply legislation and regulatory requirements when delivering service to customers

### CPR2 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

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# Unit Handbook

## CPR3 – Self-management

Unit reference number: D/616/3719

**Level: 2**

**Guided Learning (GL) hours: 63**

### Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of their own role and responsibilities for the delivery of customer service within their organisation and to utilise this knowledge to organise themselves and support others within the customer service environment.

### Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Know own role and responsibility

LO2 Organise oneself

LO3 Support others

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# Unit content

## Assessment information

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

## Assessment guidance

**Positive and confident language** could include:

- avoiding any negative or doubtful language
- showing an understanding of the customer's situation
- keeping conversations with customers relevant and concise
- using words that the customer can understand

**Actions** could include dealing with both internal and external customers.

**Personal service skills** could include:

- having empathy, patience and consistency.
- being adaptable to meet different customer needs and expectations
- ensuring that the information given to customers is clear and accurate
- having a strong work ethic, as customers appreciate someone who will see their problem through to its resolution.
- having a good knowledge of the products or services offered by the organisation

**Customer efficiency** is ensuring that any customer query or complaint is dealt with as quickly as possible, but maintaining excellent customer service

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Know own role and responsibility	1.1 Describe their role and responsibility within the organisation
	1.2 Demonstrate personal pride in the job through appropriate dress and positive and confident language
	1.3 Explain how the impact of their actions can affect others
	1.4 Describe the targets and goals that are needed to be delivered against

Learning Outcome	Assessment Criteria
LO2 Be able to organise oneself	2.1 Demonstrate how to organise themselves by prioritising their own workload/activity and working to meet deadlines
	2.2 Take ownership for keeping own service knowledge and skills up-to-date
	2.3 Ensure an up-to-date knowledge of products or services that are available from own organisation
	2.4 Identify personal goals and propose developments that would help achieve them
	2.5 Act upon and seek feedback from others to develop or maintain personal service skills and knowledge

Learning Outcome	Assessment Criteria
LO3 Be able to support others	3.1 Consistently communicate and work with others in the interest of helping customer efficiency
	3.2 Share personal learning and case studies with others to support good practice
	3.3 Present recommendations for improvement to assist customer efficiency

### CPR3 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager



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# Unit Handbook

CPR4 – Supporting the customer focused experience

Unit reference number: R/616/3720

**Level: 2**

**Guided Learning (GL) hours: 56**

## Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of how to identify a customer focused experience and then to deliver this experience to ensure that an excellent level of customer service is provided. The learner will also demonstrate their ability to deal with customer conflict and challenge.

## Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Identify a customer focused experience

LO2 Deliver a customer focused experience

LO3 Deal with customer conflict and challenge

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# Unit content

## Assessment information

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

## Assessment guidance

The **customer focused experience** is the total interaction between the customer and the organisation. Although customer service is part of this experience, it is important that, overall, the customer feels they have had a 'good' experience and would stay loyal to that organisation.

**Communication behaviours** should include:

- developing a clear understanding of the customers' needs
- maintaining clear communication with customers regarding expectations and time scales
- following through and responding to customers' requests, questions and complaints in a timely manner
- following up with customers after a problem has been resolved to inform them of any action taken
- taking personal responsibility for meeting commitments and correcting problems
- responding calmly to customers when under pressure

**Positive engagement** is building a good rapport and trust between the customer and the organisation, in order that the customer feels valued.

**Sign-posting** is the process of giving customers details of other services, products or information sources that will be able to help them.

**Service recovery** is converting a previously dissatisfied customer into a loyal customer. This can be achieved by solving problems before the customer can complain, or before they become dissatisfied. Customer satisfaction surveys can help to develop effective service recovery strategies.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to identify a customer focused experience	1.1 Explain the importance of building trust with a customer
	1.2 Demonstrate methods of building trust with a customer
	1.3 Set communication behaviours that establish clearly what each customer requires and manage their expectations
	1.4 Explain how establishing the facts enable the creation of a customer focused experience

Learning Outcome	Assessment Criteria
LO2 Be able to deliver a customer focused experience	2.1 Use a range of questioning skills, including listening and responding in a way that achieves positive engagement and delivery
	2.2 Provide clear explanations and offer options in order to help customers make choices that are mutually beneficial to both the customer and your organisation
	2.3 Take ownership from the first contact and then take responsibility for the needs of customers
	2.4 Describe how to use systems, equipment and technology to meet the needs of customers
	2.5 Describe the types of measurement and evaluation tools available to monitor customer service levels

Learning Outcome	Assessment Criteria
LO3 Be able to deal with customer conflict and challenge	3.1 Demonstrate an understanding of the customer's point of view
	3.2 Demonstrate patience and calmness when dealing with a customer
	3.3 Use appropriate verbal and non-verbal communication skills to minimise customer conflict
	3.4 Use appropriate sign-posting or resolution to meet your customers' needs and manage expectations
	3.5 Maintain informative communication during service recovery

### CPR4 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager

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# Unit Handbook

CPR5 – Communicating with customers

Unit reference number: Y/616/3721

**Level: 2**

**Guided Learning (GL) hours: 28**

## Unit aim

The aim of this unit is to provide the learner with the opportunity to gain an understanding of how to use communication skills with customers and to also demonstrate their ability to treat all customers as individuals.

## Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Use communication skills with customer

LO2 Treat all customers as individuals

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# Unit content

## Assessment information

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and the skills and knowledge requirements.

## Assessment guidance

**Reinforcement techniques** are used to confirm understanding. Two examples of reinforcement techniques in **non-facing customer interactions** are:

- telephone communication - active listening, questioning, paraphrasing, etc.
- written communication - acknowledgement of information, confirmation of any action taken based upon the information, etc.

**Core values** are the guiding principles that help to define how an organisation should behave in business and perhaps beyond, if they have an additional mission to serve the community. Core values are usually expressed in the organisation's mission statement.

A **service culture** is when staff in the organization take-on a customer-centric approach to their regular duties and work activities. It is defined as putting customer needs first when presenting solutions and providing support.

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# Learning outcomes

<b>Learning Outcome</b>	<b>Assessment Criteria</b>
LO1 Be able to use communication skills with customers	1.1 Use appropriate verbal and non-verbal communication skills, along with summarising language, during face-to-face communications
	1.2 Use a range of communication skills, along with reinforcement techniques, during non-facing customer interactions
	1.3 Use an appropriate 'tone of voice' in all communications, including written and digital, that reflect the organisation's brand

<b>Learning Outcome</b>	<b>Assessment Criteria</b>
LO2 Be able to treat all customers as individuals	2.1 Provide a personalised customer service experience by treating customers as individuals
	2.2 Demonstrate how the organisation's core values and service culture are maintained when dealing with customers

### CPR5 Document History

Version	Issue Date	Changes	Role
v1.0	31/01/2023	Re-branded	Compliance Manager



## Document History

Version	Issue Date	Changes	Role
v2.0	31/01/2023	Formatting and re-branding. No content amendment.	Data Administrator