

CST TRAINING

601/4756/8 PROQUAL LEVEL 4 NVQ DIPLOMA IN CUSTOMER SERVICE HANDBOOK

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A Note From Us

Thank you for your enquiry regarding the Level 4 NVQ Diploma in Customer Service.

We have prepared the following document to provide you with a comprehensive overview of the requirements of the NVQ. We pride ourselves on our affordability, excellent communication and fast turnaround times.

Our assessors will always be on hand to help you complete your NVQ. Please look through our welcome pack and let us know if you have any questions.



Cohan Tyler
Managing Director

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This is to certify that

CST Training Limited

*is an approved
ProQual Centre*

*for the year of
2021*

Pam Lewis
Director
ProQual AB Ltd

ProQual Number: 01430 423 822

www.quals-direct.co.uk

What is an E-Portfolio?

At CST Training we use an E-Portfolio system called Quals Direct- it makes completing the NVQ simple, efficient and secure.

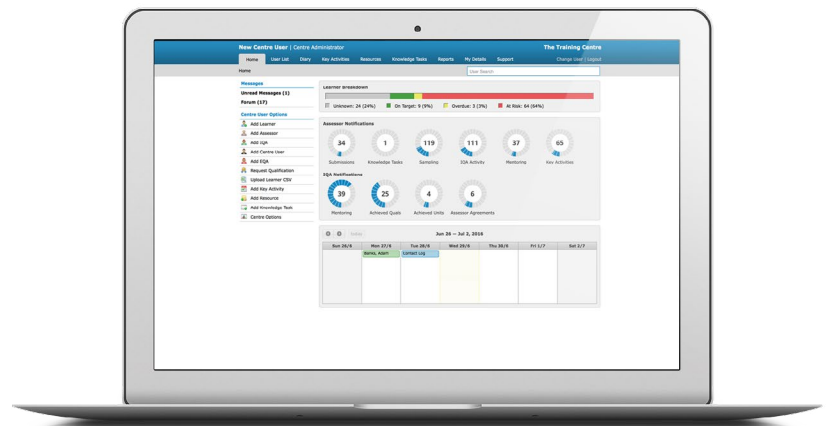
You will be able to upload evidence, receive feedback and track your progress at any point.

Using this system we are able to provide you with the best support possible which we will enable you to complete the NVQ with the least amount of hassle.

Of course we are also always available via the phone.

The Learner Portal will contain:

- Knowledge Questions
- Evidence Schedule
- Witness Testimony
- Case Study Guide and Template
- All other resources you need to complete the NVQ



Upon registration you will receive log in details via email which you can then use to access the learner portal [here](#).

In order to build your NVQ candidates must complete 3 mandatory units and then choose from 31 optional units to achieve a minimum of 50 credits.

Mandatory Units:

- D/506/2153 Champion customer service (5 credits)
T/506/2952 Manage personal and professional development (3 credits)
M/506/2898 Manage customer service operations (7 credits)

Optional Units:

Group B

- F/506/2176 Review the quality of customer service (4 credits)
R/506/2179 Build and maintain effective customer relations (6 credits)
L/506/2181 Manage a customer service award programme (4 credits)
Y/506/2183 Manage the use of technology to improve customer service (4 credits)
Y/506/2166 Develop resources to support consistency of customer service delivery (5 credits)
D/506/2167 Use service partnerships to deliver customer service (3 credits)
K/506/2169 Resolve customers' problems (4 credits)
R/506/2151 Resolve customers' complaints (4 credits)
D/506/2170 Gather, analyse and interpret customer feedback (5 credits)
K/506/2172 Monitor the quality of customer service interactions (5 credits)
R/506/2960 Develop a customer service strategy (6 credits)
D/506/2962 Develop a social media strategy for customer service (5 credits)
H/506/2963 Develop customer service through social media (5 credits)

Group C

- M/506/1962 Encourage learning and development (3 credits)
T/506/1980 Initiate and implement operational change (4 credits)

R/506/1999	Manage a project (6 credits)
L/506/2004	Manage business risk (6 credits)
R/506/1954	Support environmental sustainability in a business environment (4 credits)
D/504/4056	Manage Health and Safety in own area of responsibility (5 credits)
H/503/0417	Manage incident management systems in a contact centre (6 credits)
T/506/1820	Promote equality, diversity and inclusion in the workplace (3 credits)
A/506/1821	Manage team performance (4 credits)
J/506/1921	Manage individuals' performance (4 credits)
F/502/8612	Negotiating, handling objections and closing sales (4 credits)
R/502/8615	Obtaining and analysing sales-related information (4 credits)
K/502/8622	Buyer behaviour in sales situations (3 credits)
K/503/0418	Manage incidents referred to a contact centre (6 credits)
D/506/2055	Design business processes (5 credits)
Y/503/0401	Manage direct sales operations in a contact centre (7 credits)
J/502/4397	Bespoke software (4 credits)
J/506/2292	Encourage innovation (4 credits)

You will need to complete a set of knowledge questions.

There are no right or wrong answers, they are based on your knowledge and experience. There are quite a lot of questions and these will take up most of your time during the NVQ.

However, most of our candidates find that with a bit of effort they are completed fairly easily.

Example Questions

If you would like more examples please get in touch.

Champion Customer Service D/506/2153

1.1 Evaluate the importance of viewing operations from the customer's viewpoint

1.2 Analyse the role of service partners in providing customer service

1.3 Evaluate the effectiveness of information collection systems and reports

1.4 Describe organisational decision-making processes and limits of their own authority

1.5 Assess the suitability of a range of monitoring techniques to identify opportunities for customer service improvements

The evidence you will gather for this Level 4 NVQ will be based on the role you have and the optional units you choose for the NVQ.

During your induction with your assessor you will define an Initial Assessment Plan which will determine what evidence you will need to gather. These will be directly related to the role you carry out and will be documentation you likely already have on file as part of your role.

Your dedicated assessor will form a list for you to gather within your induction.



A Guide

In this section you will find, an example witness testimony, the witness testimony that you will need to get your witness to complete and this guide, which will help you achieve that.

You will be provided an example of the first and last page of a witness testimony. This shows you how it should be completed.

The witness testimony is a way of the witness saying that you do your job and you carry out your job to the correct level and to the correct requirements.

The witness will need to fill in your details, as the candidate details, including the name of the qualification that you are doing, for example "Level 4 Customer Service NVQ" – The Witness will then need to fill out their details, including a sample signature and a sample set of initials.

Below this is this section -

"Please read and only Initial the criteria you have witnessed **CANDIDATE NAME** carry out whilst working with you at **NAME OF SITES OR SITES**"

Make sure the witness writes your full name and then the full name of the sites and or sites.

The witness will then need to initial every box (that they are happy to initial) on the right-hand side of the page, on every page.

They will then need to complete the details on the final page and sign and date at the bottom.

PLEASE NOTE – If you need a DocuSign Version of the witness testimony, this can be provided.

Lastly, if you have any questions, please do not hesitate to ask.

An Example

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Candidate Name: Qualification:

Site:

Witness Name: Company:

Position in Company: Contact No:

Sample Signature: Sample Initials:

Please read and only Initial the criteria you have witnessed..... carry out whilst working with you at

Champion customer service D/506/2153

Assessment Criteria	Initial
2.1 Monitor customer service delivery to identify issues that are important to customer service	
2.2 Analyse the implications of improvements to customer service	
2.3 Identify customer service issues relating to new products and/or services	
2.4 Identify the strategic and managerial implications of changes to customer service and the service offer	
3.1 Promote the role of customer service within an organisation's operational plans	
3.2 Inform individual staff members about their role in championing customer service	
3.3 Promote the benefits of effective customer service	
3.4 Provide validated customer service advice and information to colleagues	
3.5 Support others to identify areas for improvement to customer service	
3.6 Monitor the effectiveness of advice and information given	
3.7 Take actions to ensure that customer service delivery meets agreed standards	

Manage Personal and Professional Development Y/506/1955

Assessment Criteria	Initial
2.1 Evaluate the benefits of personal and professional development	
2.2 Explain the basis on which types of development actions are selected	
2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis	
2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives	
2.5 Execute the plan within the agreed budget and timescale	



In this section, you will learn how to write your case studies and what you need to include, depending on the qualification that you are doing.

Case studies are a written account of your day to day work, an explanation of what you do from the time that you arrive at work and the time that you leave work.

We will require you to write two case studies. As you know, most days within business vary and what you do on Monday, will not be what you do on Thursday. In order to get a varied account of what you do, you will need to write one case study based on one day and the other case study based on another day, which occurs further into the NVQ.

For example, you could write case study 1 about a typical Monday which occurred towards the start of your NVQ and case study 2 about a Thursday or Friday, a few weeks later, towards the end of the NVQ. Please do not produce two identical case studies. Or your case studies could be written over an extended time period. It is really important that you include as

much detail as possible, no matter how small the detail might seem, it helps us, as the assessor understand what you do, and it also helps you hit all the required standards. We will include the set of standards to help guide you, however, do not get bogged down by them. Please see the separate guide on the standards.

You will see the Case Study Template Document – please write your case study in the 'Case Study Report' section of Quals Direct.

Please do **NOT** write your case in the third person. You are writing about your personal experience, so please write it in the first person.

The case study should be written in full sentences with as much explanation of the tasks and activities as possible. You are writing about what you did, at work, on a particular day or over a couple of days if your days are usually more spread out.

We are not assessing you on your spelling and grammar, so do not worry if your spelling and grammar is not the best.

If written case studies are not suitable for you, we can also carry out discussions over the phone or on video call.

These are a great way of talking about the work that you do and have done in the past. Over the course of the call we are able to provide a wealth of great evidence that will go towards your NVQ.

We will ask you to talk to us about your work using real examples of your working practices. During the call you will more than likely cover all of the units, which is a great time effective way to help complete your NVQ.



Price

The total cost of the NVQ is £1100.00 +VAT

Payment Plans

We offer a range of payment plans in order to cater to your needs you can choose from:

1. 50% at the start of the NVQ and 50% upon completion
2. 3 split payments:
 - 30% at the start
 - 30% after 30 days
 - 30% upon completion
3. Finance with Kandoo
 - To find out more please visit our Customer Service NVQ page [here](#)



CST Training Limited is registered in England and Wales, Company Registration Number: 12052513. Our registered office is 64 Bodiam Court, 8 Thornbury Way, London, E175FU. CST Training Limited is an Introducer Appointed Representative ('IAR') of Switcha Limited, Trading as Kandoo which is authorised and regulated by the Financial Conduct Authority, Firm Registration Number: 828963 for Credit Broking and Insurance Distribution. Switcha Limited is a Credit Broker and not a Lender. You can check this on the Financial Services Register at <https://register.fca.org.uk/>.

Timing

The NVQ roughly takes about 8-16 weeks to complete. This varies from candidate to candidate it is dependent on your effort level.

Policies

Please see our company policies below for your reference

Equal Opportunities & Diversity

Equality Policy

CST Training Ltd undertakes to comply with all current legislation related to equality and diversity and will not discriminate on grounds of gender, sexual orientation, colour, ethnic or national origin, age, marital status, family circumstances, social-economic background, disability, religious or potential beliefs or other irrelevant distinction.

Principles

The aim of the policy is to ensure that all individuals, with whom CST Training Ltd has a relationship, are treated solely based on their merits, abilities, and potential. CST Training Ltd is committed to:

- i) promoting equality and diversity in all aspects of its regulated functions and activities
- ii) developing assessments that avoid creating unnecessary barriers to achievement and ensuring that assessments are free from bias
- iii) promoting access to assessment for all
- iv) ensuring that employment and contracting policies provide opportunity for all regardless of gender, colour, ethnic or national original, age, social-economic background, disability, religious or political beliefs, marital status, family circumstances, sexual orientation, or any other irrelevant distinction Implementation

The Equality Policy will be implemented in relation to:

- the provision of all services
- candidates who apply for assessment

- all forms of assessments
- the monitoring of registration and certification data to ensure compliance with equality of opportunity
- the monitoring of any promotional or published material
- recruitment, selection and training of staff CST Training Ltd will ensure that its equal opportunities policy is communicated to all staff, external quality assurance verifiers (EQA Verifiers) and to all candidates.
- Responsibility for monitoring the effectiveness of the policy and taking corrective action from its outcomes to maintain and improve it rests with the CST Training Ltd.

CST Training Ltd assessment centre will provide fair assessments. You can appeal if you think your assessment was unfair. CST Training Ltd has a clear procedure, which has three stages they are as follows:

STAGE ONE – Assessor and Candidate:

- If you disagree with the assessment you must first discuss your reasons with the assessor concerned as soon as possible. Normally this will be immediately after you receive the assessor decision. If this is not convenient you should arrange an appointment with the assessor.
- The assessor must consider your reasons and look again at what you did for your assessment. He or she must then give you an immediate response which must be:
 - A clear explanation backed up in writing of the assessment decision.
 - A new decision or confirmation of the original decision.

If you agree with the assessor's response, the appeal stops at this point. You must tell the assessor if you are still unhappy with the decision your appeal will then proceed to Stage Two.

STAGE TWO – Internal verifier:

If you are still dissatisfied after Stage One, the assessor must give the Internal Verifier the following information within 24hrs of the appeal reaching Stage Two:

- The original assessment record and candidates' evidence, where appropriate.
- The written explanation and confirmation of the assessment decision.
- The Internal Verifier will reconsider the assessment decision, considering the following:
 - o The candidate's reason for appeal,
 - o The candidate's evidence and associated record,
 - o The assessor's reason for the decision,
 - o The opinion of another assessor from CST Training Ltd
 - o The Internal verifier must then give you the reconsidered decision in writing, within five working days of receiving the appeal.

You must tell the Internal verifier if you are still unhappy with the reconsidered assessment decision. The appeal will proceed to Stage Three. 15

STAGE THREE – Appeals Panel:

If you are still dissatisfied with the decision after Stage Two, you have the right to go to an appeals panel. The Internal Verifier who acted at Stage Two must send the following details to the CST Training Ltd Assessment Centre Coordinator:

- The written explanation and confirmation of the assessment decision,
- Assessment record sheets,
- Any written comments of the Internal verifier.

Within ten working days of receiving the appeal, the CST Training Ltd Assessment Centre Coordinator must ask the Product Manager (ProQual) to call an appeals panel, the panel will consist of three representatives of the awarding body.

The candidate may speak to the appeals panel or be represented by an advisor or make written submissions.

The assessor who made the original decision may be asked to attend the panel to answer any questions

The appeals panel will then discuss the matter in private and reach a majority decision. The decision will be sent to you, the Assessor and to CST Training Ltd Assessment Centre within 5 days.

THE DECISION OF THE APPEALS PANEL IS FINAL

CST Training LTD will at all times ensure that evidence, including but not limited to, photos, site/company paperwork, method statements, references and any other evidence listed in the evidence schedule handed out to the candidate and or company, will be stored by the assessor appropriately and in accordance with the below policy document. This ensures that evidence remains confidential and is used strictly for the purpose of the candidates NVQ portfolio.

Please see the full policy below.

1. Data protection principles

CST Training Ltd is committed to processing data in accordance with its responsibilities under the GDPR.

Article 5 of the GDPR requires that personal data shall be:

- a) processed lawfully, fairly and in a transparent manner in relation to individuals.
- b) collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes;
- c) adequate, relevant, and limited to what is necessary in relation to the purposes for which they are processed.
- d) accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay.
- e) kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes subject to implementation of the

appropriate technical and organisational measures required by the GDPR in order to safeguard the rights and freedoms of individuals; and
f) processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.”

2. General provisions

This policy applies to all personal data processed by the CST Training Ltd.

- a) The Responsible Person shall take responsibility for the CST Training Ltd 's ongoing compliance with this policy.
- b) This policy shall be reviewed at least annually.
- c) The CST Training Ltd shall register with the Information Commissioner's Office as an organisation that processes personal data.

3. Lawful, fair, and transparent processing

- a) To ensure its processing of data is lawful, fair, and transparent, the CST Training Ltd shall maintain a Register of Systems.
- b) The Register of Systems shall be reviewed at least annually.
- c) Individuals have the right to access their personal data and any such request made to the CST Training Ltd shall be dealt with in a timely manner.

4. Lawful purposes

- a) All data processed by the CST Training Ltd must be done on one of the following lawful bases: consent, contract, legal obligation, vital interests, public task or legitimate interests (see ICO guidance for more information).
- b) The CST Training Ltd shall note the appropriate lawful basis in the Register of Systems.
- c) Where consent is relied upon as a lawful basis for processing data, evidence of opt-in consent shall be kept with the personal data.
- d) Where communications are sent to individuals based on their consent, the option for the individual to revoke their consent should be clearly available and systems

should be in place to ensure such revocation is reflected accurately in the CST Training Ltd.'s systems. 18

5. Data minimisation

a) The CST Training Ltd shall ensure that personal data are adequate, relevant, and limited to what is necessary in relation to the purposes for which they are processed.

6. Accuracy

The CST Training Ltd shall take reasonable steps to ensure personal data is accurate.

Where necessary for the lawful basis on which data is processed, steps shall be put in place to ensure that personal data is kept up to date.

7. Archiving / removal

a) To ensure that personal data is kept for no longer than necessary, CST Training Ltd shall put in place an archiving policy for each area in which personal data is processed and review this process annually.

b) The archiving policy shall consider what data should/must be retained, for how long, and why.

8. Security

a) The CST Training Ltd shall ensure that personal data is stored securely using modern software that is kept-up to date.

b) Access to personal data shall be limited to personnel who need access and appropriate security should be in place to avoid unauthorised sharing of information.

c) When personal data is deleted this should be done safely such that the data is irrecoverable.

d) Appropriate back-up and disaster recovery solutions shall be in place.

9. Breach

In the event of a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data, the CST Training Ltd shall promptly assess the risk to people's rights and freedoms and if appropriate report this breach to the ICO (more information on the ICO website).

Updated 01/06/2020

Definitions

Organisation	means CST Training Ltd, a registered CST Training Ltd.
GDPR	means the General Data Protection Regulation.
Responsible Person	means Cohan Tyler
Register of Systems	means a register of all systems or contexts in which personal data is processed by the Organisation.

George Macgregor ★★★★★

Positive: Communication, Professionalism, Quality, Value

"So good at explaining things clearly and very good at setting targets which are realistic. I have never waited longer than 24hours for a reply or the support I've needed. All out great service, great communication and very friendly."

Robert Garner ★★★★★

Positive: Professionalism

"CST training have been fantastic to help be achieve all my NVQ goals even in these uncertain times. Cohan has gone above and beyond at every stage to help and guild me through. I would recommend to anyone and wouldn't hesitate to use them again in the future."

Damian Hubbard ★★★★★

Positive: Communication, Professionalism, Quality, Value

"I don't think I can get down in words how happy I am with the service I've received. A massive thank you to David Cox who guided me through my NVQ, and of course to Cohan and all at CST. To anyone who reads this review, please don't look any further for a training provider. I will definitely be back in touch as my career progresses."

Mike Burgess ★★★★★

Positive: Communication

"Excellent Service and Very Happy. Very supportive throughout the process and always on hand to guide and assist. Not a bad word to say about Cohan and CST Training."

CST TRAINING