

Title:	Understanding Customers and Service Situations
Level:	Entry Level 3
Credit value:	2
GLH:	20
Unique Reference Number:	D/652/0528
Sector Subject Area:	14.1 Foundations for Learning and Life
Aim:	The aim of this unit is to provide learners with the knowledge and skills to recognise customers and routine service situations, and to respond appropriately in a business environment.
Assessment Type:	Assessment of this unit will be through an internally set and internally assessed portfolio of evidence.
Assessment Guidance:	<p>Assessment decisions for skills-based learning outcomes must be made during the learner's normal work activity. Direct observation should form a primary source of evidence and be supported, where appropriate, by discussion, annotated screenshots or photographs, saved documents, or witness statements.</p> <p>Skills-based assessment must be carried out over an appropriate period of time to ensure consistency and independence of performance.</p> <p>Evidence must confirm that the learner can recognise customers and routine service situations and respond appropriately in a business environment.</p>

Learning outcomes

The learner will:

1. Understand who customers are in a business environment.

Delivery content:

The aim of this learning outcome is to provide learners with the knowledge to understand who customers are and why they are important to a business.

The learner must demonstrate that they can:

- 1.1 Identify who **customers** are in a business environment.
- 1.2 Identify different **types of customers**.
- 1.3 Identify **why customers are important to a business**.

2. Understand different service situations in a business environment.

Delivery content:

The aim of this learning outcome is to provide learners with the knowledge to understand different service situations in a business environment.

The learner must demonstrate that they can:

- 2.1 Identify **different service situations** that may occur in a business.
- 2.2 Identify the **purpose of providing good customer service**.
- 2.3 Identify **how service situations may affect customers**.

3. Be able to respond appropriately to customers in routine service situations.

Delivery content:

The aim of this learning outcome is to provide learners with the knowledge and skills to respond appropriately to customers in routine service situations.

The learner must demonstrate that they can:

- 3.1 **Use appropriate behaviour** when dealing with customers.
- 3.2 **Communicate politely and clearly** with customers.
- 3.3 **Follow instructions or procedures** when responding to customers.

4. Understand how to deal with simple customer problems or requests.

Delivery content:

The aim of this learning outcome is to provide learners with the knowledge to understand how to deal with simple customer problems or requests.

The learner must demonstrate that they can:

- 4.1 Identify **simple customer problems or requests**.
- 4.2 Identify **appropriate actions** to take when dealing with a simple customer problem.
- 4.3 Identify when to **ask for help or pass a problem to someone else**.

<p>Scope of Training</p> <p>The Scope of Training identifies areas that must be covered during the delivery of this unit. This is the minimum that is expected but tutors are expected to include other areas, knowledge of which will benefit their learners, based on location, types of work available and from the tutors own professional experience.</p>	
<p>Requirements</p>	
<p>Customers in a business environment:</p>	<p>Definition:</p> <p>People or organisations who receive goods or services from a business.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying who customers are. • Understanding that customers receive goods or services. • Recognising that customers can be individuals or organisations. • Understanding the difference between a business and its customers. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying who customers are in a business context. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Examples from different types of businesses. • Identifying customers in local workplaces. • Internal and external customers. • Simple matching activities (business → customer).
<p>Types of customers:</p>	<p>Definition:</p> <p>Different groups of people or organisations who use or receive services from a business.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying at least two types of customers. • Understanding that customers can be internal or external. • Recognising that customers may have different needs. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying different types of customers in simple scenarios.

	<p>Teaching could include:</p> <ul style="list-style-type: none"> • Comparing internal and external customers. • Customers in retail, office, or service environments. • Group discussions of different customer examples. • Case study activities.
<p>Why customers are important to a business:</p>	<p>Definition: Understanding the role customers play in helping a business operate and succeed.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Customers provide income to a business. • Customers help a business continue operating. • Good customer relationships support business reputation. • Businesses rely on customers for success. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one reason why customers are important to a business. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Discussing consequences of losing customers. • Linking customer satisfaction to repeat business. • Simple examples of how businesses depend on customers. • Exploring the impact on staff jobs and income.
<p>Different service situations:</p>	<p>Definition: Situations where a business provides help, information, or a service to a customer.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying routine service situations that may occur in a business. • Recognising that service situations can happen face-to-face, by telephone, or online. • Understanding that service situations involve interaction between staff and customers. • Giving examples of common service situations. • Learners must demonstrate:

	<ul style="list-style-type: none"> ○ Identifying at least one service situation in a business context. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Comparing service situations in different types of businesses. • Role-play examples of routine service interactions. • Matching activities (situation → type of service). • Discussing positive and negative service examples.
<p>Purpose of providing good customer service:</p>	<p>Definition: Understanding why businesses aim to provide good service to customers.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Good customer service supports customer satisfaction. • Good service encourages repeat business. • Good service supports business reputation. • Good service helps a business succeed. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one purpose of providing good customer service. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Discussing consequences of poor service. • Linking good service to customer loyalty. • Exploring how service affects business income. • Simple case examples of positive service outcomes.
<p>How service situations may affect customers:</p>	<p>Definition: Understanding how a customer may feel or respond depending on how a service situation is handled.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Recognising that positive service can make customers feel valued. • Understanding that poor service can cause dissatisfaction. • Identifying that service situations can influence customer decisions.

	<ul style="list-style-type: none"> • Recognising that customer feelings may affect future business. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one way a service situation may affect a customer. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Discussing customer emotions e.g. happy, frustrated, confused. • Comparing positive and negative service examples. • Simple discussion of how service affects reputation. • Group reflection activities.
<p>Use appropriate behaviour:</p>	<p>Definition: Acting in a respectful, professional and suitable way when interacting with customers in a business environment.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Using respectful language. • Listening without interrupting. • Maintaining positive body language. • Remaining calm and patient. • Showing willingness to help. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Using appropriate behaviour in a routine customer service situation. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Role-play exercises. • Identifying appropriate and inappropriate behaviours. • Discussing workplace expectations. • Modelling professional conduct.
<p>Communicate politely and clearly:</p>	<p>Definition: Sharing information with customers in a way that is respectful, simple and easy to understand.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Speaking clearly and at an appropriate pace. • Using polite and courteous language.

	<ul style="list-style-type: none"> • Giving accurate information. • Checking that the customer understands. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Communicating politely and clearly in a routine service interaction. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Practising greetings and responses. • Using simple explanations. • Handling straightforward customer questions. • Comparing polite and impolite examples.
<p>Follow instructions or procedures:</p>	<p>Definition: Carrying out customer service tasks in line with given instructions or workplace procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Following step-by-step instructions. • Completing tasks in the correct order. • Referring to procedures when unsure. • Recognising when to escalate to a supervisor. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Following a simple instruction or procedure when responding to a customer. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Using scenario-based tasks. • Checking work against written instructions. • Practising routine workplace processes. • Discussing why procedures are important.
<p>Simple customer problems or requests:</p>	<p>Definition: Straightforward issues or requests raised by customers that can usually be resolved using routine procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying examples of simple customer problems (e.g. incorrect item, request for information, basic complaint). • Recognising the difference between a request and a problem.

	<ul style="list-style-type: none"> • Understanding that some problems are routine and manageable. • Identifying situations that are within a learner’s level of responsibility. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one example of a simple customer problem or request. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Scenario-based discussions. • Matching problems to possible solutions. • Comparing simple vs complex problems. • Examples from different business settings.
<p>Appropriate actions:</p>	<p>Definition: Suitable steps taken to deal with a simple customer problem in line with workplace procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying actions that follow workplace rules. • Responding calmly and politely. • Providing accurate information. • Taking basic steps to resolve a simple issue. • Understanding the importance of acting promptly. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one appropriate action for a simple customer problem. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Role-play problem-solving activities. • Discussing positive and negative responses. • Linking actions to customer satisfaction. • Exploring consequences of inappropriate actions.
<p>Ask for help or pass a problem to someone else:</p>	<p>Definition: Recognising when a customer problem cannot be resolved independently and referring it to an appropriate person.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying situations that require escalation.

	<ul style="list-style-type: none"> • Recognising limits of own authority. • Knowing who to refer problems to e.g. supervisor. • Understanding why escalation is sometimes necessary. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying when to ask for help or pass a problem on. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Escalation scenarios. • Mapping workplace support structures. • Discussing why some problems require higher authority. • Practising how to refer a problem politely.
<p>Use appropriate behaviour:</p>	<p>Definition: Acting in a respectful, professional and suitable way when interacting with customers in a business environment.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Using respectful and professional language. • Listening without interrupting. • Showing positive body language e.g. eye contact, posture. • Remaining calm and patient. • Being helpful and attentive to customer needs. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Using appropriate behaviour in a routine customer service situation. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Role-play customer interactions. • Comparing appropriate and inappropriate behaviours. • Discussing workplace expectations. • Modelling professional conduct.
<p>Communicate politely and clearly:</p>	<p>Definition: Providing information to customers in a way that is respectful, simple and easy to understand.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Speaking clearly and at an appropriate pace. • Using polite expressions e.g. “please”, “thank you”.

	<ul style="list-style-type: none"> • Giving accurate and relevant information. • Checking that the customer understands. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Communicating politely and clearly in a service interaction. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Practising greetings and responses. • Using simple explanations. • Handling straightforward customer questions. • Reviewing examples of clear vs unclear communication.
<p>Follow instructions or procedures:</p>	<p>Definition: Carrying out customer service tasks in line with workplace instructions or set procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Following step-by-step instructions. • Completing tasks in the correct order. • Referring to written or verbal procedures. • Knowing when to seek support if unsure. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Following a simple instruction or procedure when responding to a customer. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Scenario-based service tasks. • Checking work against given instructions. • Practising routine workplace processes. • Discussing why procedures are important.
<p>Simple customer problems or requests:</p>	<p>Definition: Straightforward issues or requests raised by customers that can usually be resolved using routine workplace procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying examples of simple customer problems (e.g. incorrect item, missing information, basic complaint). • Recognising the difference between a problem and a request.

	<ul style="list-style-type: none"> • Understanding that simple problems are within normal staff responsibilities. • Identifying routine service situations where problems may occur. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one example of a simple customer problem or request. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Scenario-based discussions. • Matching problems to possible actions. • Comparing simple and more complex problems. • Examples from different business environments.
<p>Appropriate actions:</p>	<p>Definition: Suitable steps taken to deal with a simple customer problem in line with workplace procedures.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying actions that follow workplace rules. • Responding calmly and politely. • Providing clear and accurate information. • Taking basic steps to resolve a simple issue. • Acting promptly and professionally. • Learners must demonstrate: <ul style="list-style-type: none"> ○ Identifying at least one appropriate action for a simple customer problem. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Role-play problem-solving activities. • Discussing correct and incorrect responses. • Linking actions to customer satisfaction. • Exploring the importance of following procedures.
<p>Ask for help or pass a problem to someone else:</p>	<p>Definition: Recognising when a customer problem cannot be resolved independently and referring it to an appropriate person.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Identifying situations that require escalation.

	<ul style="list-style-type: none">• Understanding limits of own responsibility.• Knowing who to refer problems to (e.g. supervisor or manager).• Recognising the importance of seeking support when needed.• Learners must demonstrate:<ul style="list-style-type: none">○ Identifying when to ask for help or pass a problem on. <p>Teaching could include:</p> <ul style="list-style-type: none">• Escalation scenarios.• Mapping workplace support roles.• Discussing why some problems require higher authority.• Practising how to refer a problem politely.
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