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Professional Accreditation

*An overview for the Customer Service
and Call Handling sectors*

**Best Practice
Training & Development Ltd**
Gresham House, 53 Clarendon Road
Watford WD17 1LA United Kingdom

t +44 (0) 1923 225225
f +44 (0) 1923 224100
info@bestpractice.uk.com
www.bestpractice.uk.com

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Section 1

Introduction

In today's competitive business world, there is a growing trend towards achieving recognition for skills and achievements.

This is particularly true within the Customer Service and Call Handling sectors, where Professional Accreditation (or PA) is an increasingly popular initiative for individuals and for whole teams and departments.

Increasing choice within the field of education, training and vocational awards means that there are many issues to consider when choosing to embark on a course of Professional Accreditation. A poor decision can lead to wasted time and poor returns on your financial investment.

This document will help you understand and make sense of the issues and the choices available. It gives an overview of the issues surrounding Professional Accreditation within the Customer Service and Customer Handling sectors and seeks to address the many questions to be answered before undertaking or introducing PA.

In doing so, it provides an overview of Best Practice's delivery model and approach to delivering workplace assessment and Professional Accreditation.

This document is relevant for managers within the sector who are considering introducing Professional Accreditation into a team. It is also relevant for anyone considering undertaking a PA for their own career progression or personal development.

Section 2

Background

What is Professional Accreditation?

Professional Accreditation or PA, provides proof of skills and achievements at work or in a work role. Accreditation is attained by achieving a recognised vocational qualification or Professional Development Award. These are recognised qualifications that give recognition to individuals for their competence and achievements in a chosen field or subject area.

What are the benefits of Professional Accreditation?

Undertaking or introducing PAs into a team can bring many benefits.

On achieving the PA, individuals will have achieved a certificate that is proof of skills and high standards.

Benefits for individual may include:

- Improved skills
- Improved standards of work
- Improved self-confidence
- Improved motivation
- Improved career opportunities

Achieving the PA may also have a positive impact on career progression by helping individuals make their next career step – whether inside or outside his/her current organisation.

Are there benefits for the team or department?

Professional Accreditation can be used to demonstrate that high standards are being achieved within a team or whole department.

It is therefore can be used as a quality-stamp to help that department's positioning both inside and outside the organisation.

Achieving PA can therefore lead to significant improvements in the way a team is perceived by others.

Often the very process of working towards one will help candidates develop their skills and improve their performance. In a customer service or sales environment, this may bring many benefits including:

- Better customer handling
- Improved customer service
- Improved customer relationships
- Higher sales
- Higher staff morale
- Lower staff turnover

The benefits may be particularly marked when a whole team or department embarks on their accreditation. Once achieved, the accreditations may provide an important 'quality stamp' – providing proof of skills and professional standards for the department as a whole.

What PA's are available?

A wide range of PAs are available for the Customer Service and Customer Handling sectors. These span frontline, supervisory and management levels. The awards fall into several broad categories as follows:

- Customer Service
- Call Handling
- IT Helpdesk & Deskside Support
- Sales and Telesales
- Team Leaders & Supervisory
- Management

A full list of available PAs is shown in the Appendix.

These PAs provide a range of possibilities for anyone in these functions. They cater for those at the start of their career to those with many years of experience.

Furthermore, by delivering PAs at different levels, individuals may progress from one award to the next – providing ongoing recognition as their career progresses.

Who recognises these accreditations?

These accreditations are built on recognised industry standards. They are widely recognised by professional bodies and are used by many organisations within the public and private sectors.

National Vocational Qualifications or (NVQs) are widely recognised within the UK.

The BTEC Framework of qualifications and awards is widely recognised in many countries throughout the world.

Who can award Professional Accreditations?

Many colleges and training providers are able to award professional accreditations. To do so, an organisation must become an 'Approved Centre' – seeking and gaining approval from a recognised Awarding Body such as City & Guilds or Edexcel.

Becoming an Approved Centre, requires a considerable investment in assessment resources, quality assurance procedures and supporting systems.

All Approved Centres are regularly audited by their Awarding Body to ensure that they are meeting rigorous quality standards.

Which award is right for me and my team?

That depends on your actual job roles and responsibilities.

Since these accreditations are for what people actually *do* at work, it is important to choose an award or awards that closely match the job role and responsibilities of the individuals or

teams involved. This may involve careful analysis to ensure that the choice of accreditation is appropriate.

Are there any entry barriers?

No. These awards are open to anyone regardless of age, background or previous qualifications.

There is no reason for an individual to start at a lower level before progressing to a higher level accreditation. The important thing is that the chosen accreditation(s) match the individuals' level, role and responsibilities.

Are there any exams?

No. These awards can be achieved through workplace assessment that does not involve exams.

Through a series of short one-to-one sessions between the candidate and his/her Assessor, it is possible to gauge the skills and competence of the candidate(s). Each assessment lasts approximately 90 minutes and the process is open, friendly and non-threatening.

When conducted by skilled assessors, candidates tend to enjoy their assessment sessions and value the support and feedback from their Assessor.

Who are the Awarding Bodies?

There are several Awarding Bodies for the PAs within the Customer Service and Call Handling sector. The largest and best recognised being City & Guilds and Edexcel.

Formed in 1878, City & Guilds is the largest awarding body in the UK for vocational awards. It has a strong international presence and its qualifications are recognised in every continent.

Edexcel (formed by a merger of BTEC and London University Examinations) is one of the leading Awarding Bodies in the UK and throughout the world. It awards over 400,000 BTEC qualifications each year in over 100 different countries across the globe.

Is there a syllabus?

Not as such. But there is a set of National Standards that apply to each award.

These standards represent good practice in each particular job function. To achieve the award, candidates need to ensure that they are meeting these standards on a consistent basis.

Who sets the National Standards?

The National Standards are set by 'National Training Organisations' or NTOs. Appointed by Government, the NTOs formulate standards for their particular industry or occupation.

Important NTOs for the Customer Service and Call Handling sectors include The Institute of Customer Service (ICS), Tele.com NTO and the Institute of Management (IM).

Section 3

Important Considerations

Is Professional Accreditation right for me and my team?

To assess whether accreditation is right for a particular individual or team, there are a number of questions to consider:

- 1) Are you interested in achieving high standards?
- 2) Are you open to change and improvement?
- 3) Do you see benefit in recognition of skills and achievements?

If the answer to these questions is 'yes' then that person or team is likely to benefit greatly from undertaking a PA.

How long will it take to achieve the accreditation?

Careful attention should be paid to the issue of timescales when undertaking or introducing PAs.

Many Approved Centres offer open-ended timescales. Unfortunately, one implication of open-ended timescales is that it is easy for candidates to lose momentum and to fail to achieve their accreditation.

Conversely, some organisations place great demands on candidates to achieve their accreditations quickly - imposing frequent, sometimes weekly assessments. These intensive methods may be imposed to meet internal goals and targets, and may have a negative impact on candidate's experience and motivation to achieve the accreditation.

Clearly, for a successful accreditation project, timescales should be realistic and achievable. They should be short enough to maximise motivation and momentum whilst avoiding placing candidates under undue pressure.

When working with a group of candidates, target completion dates should be agreed with the department manager before starting an accreditation. This focuses all parties on competing within an agreed timescale and ensures that focus and momentum is maintained.

Should candidates have to attend any training courses?

If candidates are experienced and well-skilled, they may be able to gain their accreditation with little or no additional training.

Prior to the start of an accreditation programme, it is good practice for the Approved Assessment Centre to identify development needs for the candidate(s) and to help formulate a plan for addressing them – either internally or externally.

In many cases, the Approved Centre can be a useful partner in deliver training to meet these needs.

How much work is required?

Undertaking the accreditation should not be an onerous commitment.

The amount of work a candidate will need to do will depend on his/her current skills and how closely their work performance meets the requirements of the accreditation.

The amount of work required will also depend on the assessment methods employed by the Approved Centre.

Traditional assessment methods require candidates to compile a 'portfolio of evidence.' This may involve candidates in a time-consuming process of collecting, copying, referencing and filing a considerable

quantity paperwork and documentary evidence.

More modern assessment methods involve a flexible process that removes the need for a portfolio of evidence.

Focusing primarily on observation and discussion, these methods are less-time consuming and generally considered to be more motivating and 'candidate-friendly' than the traditional portfolio-based approach.

Do all Accreditations carry the same status?

In recent years, a number of different accreditations have become available – especially for IT Helpdesk and Support staff.

Many vendors of computer systems offer accreditation for skills relating to their products.

To have meaning and status, a true Professional Accreditation should fulfil three important criteria:

Status – a true PA should be awarded by a bona fide and recognised Awarding Body – not a commercial organisation.

Authority – a true PA is based on recognised and accepted industry standards, formulated by bona fide standards setting bodies.

Meaning – a true PA accredits real skills and proven competence. It therefore must be based on a rigorous and meaningful assessment of knowledge and performance conducted in the workplace. Short written papers and/or multiple choice tests cannot achieve this.

How do I choose an Accreditation Centre?

Accreditation is available through a large number of colleges and commercial training organisations.

However, quality and delivery methods differ greatly amongst these organisations.

The choice of an appropriate organisation as your Accreditation Centre is one of the most important decisions to make.

There are several issues to consider when selecting an Accreditation Centre to work with.

Choice – Does the Accreditation Centre offer a sufficient choice of Accreditations at different levels to cater for all members of your team, and offering a development path in future years?

Focus – is the AC a specialist in your chosen area with the necessary skills and experience to ensure successful delivery?

Track Record – does the AC have a track record of delivering successful accreditation projects within the specified subject area(s)?

Delivery methods – can the AC demonstrate that it is experienced in using modern, streamlined assessment methods?

Quality – can the AC demonstrate a commitment to the quality and service required to implement a successful accreditation programme?

Breadth of services – can the AC deliver training and skills programmes to support the accreditation programme?

Follow-up – can the AC deliver follow-up initiatives to ensure that accreditation has long-term benefits for individuals and the organisation?

Section 4

Best Practice Delivery Model

How are candidates assessed?

Best Practice has developed a unique approach that recognises the particular needs and pressures of busy Customer Service and Call Handling personnel.

Our approach is streamlined and efficient and concentrates on observation and discussion.

We also ask candidates to show their Assessor key documents such as call records, emails, memos, faxes and reports – these provide further proof of skills and achievements.

By removing the need to develop a traditional ‘portfolio of evidence’, our candidates may achieve their awards quickly and efficiently.

How much written work is there?

There are no essays or lengthy written assignments.

Candidates *will* need to complete some written work, but this is kept to a minimum by using innovative and flexible assessment methods – based mainly on observation and discussion with candidates.

Best Practice was one of the first Assessment Centres to introduce tape-recorded discussions with candidates. This removes the need for much written work; it saves the candidate a great deal of time and considerably streamlines the whole assessment process.

How long will it take to achieve the accreditation?

The actual duration will depend on several factors including which award candidates are registered for, their normal workloads, and the department’s circumstances.

When working with a group of candidates, it is helpful to agree target completion dates with the department manager before starting an accreditation.

For the suggested completion time of each award, please refer to the Appendix.

Do candidates need to attend any training courses?

Prior to the start of the programme, we provide each candidate with a detailed self-evaluation questionnaire and may also conduct a brief initial audit to assess performance and skills.

We will analyse the results and make recommendations for any training courses or workshops that may be necessary.

If candidates are experienced and well-skilled, they may be able to gain their accreditation with little or no additional training.

How do candidates know what to do?

For every candidate, we begin the process with an initial ‘induction’ session. At this session, we provide a full copy of the Standards for the award and explain exactly what needs to be done.

We arrange this induction to take place at the candidates’ location and it generally lasts under two hours. When there are several candidates from the same organisation, then we try to gather candidates together in small groups. When there is a single candidate, then the induction is delivered as a one-to-one session.

What happens at the Induction?

The induction is our opportunity to ensure that all candidates fully understand what they need to do to achieve their award.

We provide a high quality presentation that explains all aspects of the award and how it will be assessed. We also provide each candidate with a 'Getting Started' pack, containing a set of high quality support materials.

The induction presentation is presented from a portable PC, which we bring to the site.

Where do assessments take place?

All assessments take place at your work location.

When we are observing candidates, the assessments will be carried out at the desktop. A quiet meeting room is preferable for assessment discussions.

What facilities are required?

For helpdesk and call handling candidates, it is useful if the Assessor can listen in to telephone conversations with customers – via a headset if possible.

A small meeting room, close to the work area, will also be required for one-on-one assessment discussions.

How many assessments are needed?

Generally between three and five assessments per candidate – depending on the particular accreditation and the candidate's rate of progress. Please refer to the Appendix.

How many Assessors are involved?

We try to ensure that each candidate remains with the same Assessor from start to finish.

Where there are many candidates in a single organisation, it is possible that more than one Assessor will be involved. However, each candidate will remain with their own Assessor to ensure continuity.

How often does the Assessor visit?

The Assessor will normally visit candidates every four to six weeks. This provides sufficient time for candidates to undertake the required activities and to ensure that there is adequate time to plan for each forthcoming assessment.

Dates will always be agreed in advance and may be scheduled to take into account your work patterns, holidays and busy periods.

How many units must be completed?

Most of the awards have between five and nine units. Candidates will need to complete the specified number of units for their award.

For further information, please refer to the Appendix and the specification sheets for each award.

How is a group of candidates assessed?

When there is a group of candidates, the Assessor will schedule on-site visits to see several candidates on a single day – however, all candidates will be seen individually.

Whilst on-site, the Assessor will usually see and assess either three or four candidates in a single working day.

Who are the Assessors?

Best Practice is responsible for allocating one or more Assessors to every accreditation project.

All our Assessors have relevant experience and the necessary professional qualifications and skills that allow them to act as Assessors for these awards.

Can internal staff become Assessors?

Under some circumstances we can work closely with one or more people from your own organisation – perhaps a line manager or a training professional – who may wish to be involved as Assessors.

When appropriate, we are also able to train one or more of your own staff as in-house Assessors.

Who can become an Assessor?

Assessors must be suitably qualified with several units drawn from the NVQ in Training & Development – known as ‘D32’ and ‘D33’. All Assessors also need relevant previous experience in order to assess.

All our Assessors are appropriately qualified and have previous experience in either Customer Service, IT Support, Call Handling or Management roles.

What happens if a candidate misses an assessment session?

Once an assessment session is confirmed with the Assessor, candidates should make every effort to attend unless there are exceptional circumstances.

In the case of illness, or other exceptional circumstances, assessment sessions may be rearranged for a later date.

How much work is required?

Undertaking the accreditation should not be an onerous commitment.

However, the amount of work a candidate will need to do will depend on his/her current skills and how closely their work performance meets the requirements of the accreditation.

Less experienced candidates will need to spend time developing their knowledge, skills and performance before being in a position to complete their award.

We generally recommend that one to two hours per week of preparation and development allows candidates to make steady progress towards achieving their accreditation.

How will it impact on customers and service levels?

All assessment sessions are one-on-one, between the candidate and the Assessor.

Since only one member of the team is away from their workstation at any one time – there should be no appreciable adverse impact on your customers or service levels.

The only impact on service levels is likely to be a positive one.

What other services can Best Practice provide?

As well as delivering PAs, Best Practice offers a comprehensive range of services to help organisations achieve and maintain high standards.

Best Practice can also deliver structured audits and development programmes, ensuring that individuals and teams have the right skills and are continually developing within their roles. Our training and programmes are delivered as both public and in-company programmes.

In addition, Best Practice has been involved in the development of the SQ*i* Service Excellence Model and Award. This provides accreditation for entire departments or organisations who meet high standards in service delivery, and can provide a useful addition to individual accreditations.

Section 5

Supplementary Questions & Answers

What support is required from a Line Manger?

Line Managers should be supportive to their candidates. If necessary, they should help their candidates expand their responsibilities or support special assignments that may be necessary to achieve their awards.

During on-site visits, the Assessor may ask the Line Manager for a personal testimony about the candidate.

We will endeavour to meet and brief Line Managers at the outset to explain their role in the accreditation process.

How do candidates know what progress they are making?

During every assessment session, our Assessors provide clear feedback on progress and achievement. Assessors will also discuss with candidates any performance gaps that need to be addressed or new skills that need to be developed – and they will assist in developing any necessary action plans.

Can candidates contact their Assessor between sessions?

Yes. If candidates require support between visits, they may contact Best Practice by either telephone, fax or email. Their Assessor will be pleased to answer any questions and provide additional support by telephone.

How does the Line Manager know how candidates are progressing?

At the end of each on-site visit, the Assessor endeavours to update the necessary line managers with feedback on progress and any difficulties.

Can candidates fail?

Our Assessors play a supportive role and give every reasonable encouragement and assistance to candidates. However, if a candidate is unable to demonstrate that they meet the required standards, then they will not achieve their accreditation.

How are the National Standards presented?

The National Standards are divided into 'units' – each of which represents a key aspect of a job role.

Within each unit there are several 'elements'. These represent key tasks you are likely to undertake within the role, such as '*Gather information on customer problems*' or '*Improve service reliability for customers*.'

Within each element are a number of 'performance criteria.' These are detailed statements of the actual standard of performance that candidates need to achieve.

Each unit also specifies 'knowledge and understanding'. This represents the key things that candidates need to know about and to understand in order to perform to the National Standards.

How do candidates receive their awards?

Successful candidates will have their achievement confirmed by their Assessor at their final assessment. Best Practice also provides a written confirmation within five days of completion.

We will forward the actual Awarding Body certificate s for each successful candidate by recorded delivery mail, approximately four to six weeks after the final assessment.

Certificates will usually be sent via the Line Manager – allowing them to be presented at an internal ‘awards ceremony’ if appropriate.

Is there any possibility of on-going accreditation?

Like most professional qualifications, once these accreditations have been granted, they can never be taken away.

The wide range of accreditations offered means that candidates may progress through different accreditations as their job role and career develops.

Best Practice is also able to offer on-going audit and assessment to validate that a department or team is *continuing* to meet National Standards. This is considerably briefer than the initial assessment process and may be undertaken on an annual basis.

When can I/we start?

Since all sessions are conducted at the candidate’s site, we can be highly flexible with the choice of start dates. There are no pre-published dates or ‘terms’ of any kind. However, there is a six week period between registering and starting the accreditation process.

What will happen first?

Once we receive completed Candidate Registration Forms we will provide a confirmation of receipt. We will then contact the candidate or Manager after approximately six weeks to discuss the project and co-ordinate necessary starting dates.

How much will it cost?

We publish standard fees for each award. These fees cover all aspects of the accreditation process. They include documentation, a specified number of assessments per candidate and final certification.

Please contact Best Practice for a list of Accreditation fees.

How can I get hold of further information?

If you require any further information or if you want advice on selecting the most appropriate award, please contact Best Practice.

Further information on each accreditation is available from Best Practice or via our website at www.bestpractice.uk.com

If you would like to order a set of the National Standards for one or more awards, then these are available from Best Practice for a small fee.

How do I register myself or my colleagues?

To register one or more candidates, you will need to complete and return a Candidate Registration Form. This is available from Best Practice or via our website at www.bestpractice.uk.com

Appendix

Accreditations offered by Best Practice for the Customer Service and Call Handling sectors.

Accreditation	Type	Level	No. of units	Duration (months)	No. of assessments
Award in Service Provision	BTEC	Intermediate Award	2	1 – 2	1 – 2
Certificate in Service Provision	BTEC	Intermediate Certificate	5	3 – 6	3 – 4
Diploma in Service Provision	BTEC	Intermediate Diploma	8	6 – 9	4 – 5
Certificate in Service Supervision	BTEC	Advanced Certificate	7	6 – 9	3 – 4
Diploma in Service Management	BTEC	Professional Diploma	9	9 – 12	4 – 5
Help Desk Professional	BTEC	Intermediate Certificate	5	3 – 6	3 – 4
Support Professional	BTEC	Intermediate Certificate	5	3 – 6	3 – 4
Supervisor in IT	BTEC	Advanced Certificate	7	6 – 9	3 – 4
Manager in IT	BTEC	Professional Diploma	9	9 – 12	4 – 5
Customer Service NVQ	NVQ	2	5	3 – 6	3 – 4
Customer Service NVQ	NVQ	3	6	3 – 6	3 – 4
Call Handling Operations	NVQ	2	6	3 – 6	3 – 4
Call Handling Operations	NVQ	3	8	3 – 6	3 – 4
Supervising Call Handling	NVQ	3	8	6 – 9	3 – 4
Managing Call Handling	NVQ	4	9	9 – 12	4 – 5
Telesales	NVQ	2	6	3 – 6	3 – 4
Telesales	NVQ	3	10	6 – 9	3 – 4
Management	NVQ	3	7	6 – 9	3 – 4
Management	NVQ	4	9	9 – 12	4 – 5
Management (Operational)	NVQ	5	10	9 – 12	4 – 5
Management (Strategic)	NVQ	5	10	9 – 12	4 – 5
Assessors Award (D32, D33)			2	3 – 6	2 – 3