



SVQ in Merchant Supplies - Timber at SCQF Level 5

Qualification Code: GP25 45

Qualification Specification

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PURPOSE

The SVQ in Merchant Supplies – Timber at SCQF Level 5 is a nationally recognised qualification is competence based and aims to provide work-based learners with a basic knowledge of the different types of timber and timber products, how they are processed and their uses in construction. Those achieving the qualification will specialise in either purchasing selling or handling timber and be able to apply this knowledge to choosing appropriate products, advising others, and suggesting correct applications for particular functions.

The overall purpose of this qualification is to enable learners to demonstrate specific competences and knowledge appropriate for the day to day activities in a merchanting environment dealing with the buying and selling or yard operations of timber and timber based panel products. Specific products may include for example flooring, doors, window frames, mouldings, stairs and panels.

The qualification is intended for those wishing to pursue a career in the timber or related industries, or for those who are already in the industry and who wish to extend their knowledge and expertise. The qualification can also provide a very useful complementary qualification for apprenticeship programmes, or the preparation to progress to higher levels of study.

The qualification is designed to provide trade specific knowledge appropriate for the day to day activities in a timber or builder's merchant's yard or office or in retail DIY. The learner should be familiar with the main softwoods, hardwoods and panel products traded in the UK. Learners will understand how they are graded, priced, measured and selected for use. Learners will be familiar with the trade terms for these products and be able to explain how and why the items are used in the principal buildings components. At the same time there is the need to work in a safe manner and observe all relevant health, safety and environmental rules and regulations as specified by the organisation.

The qualification is part of the Scottish Qualifications Credit Framework (SCQF) and comprises of units from a number of Sector Skills Councils and therefore Assessors should use the associated relevant Assessment Strategies.

OUTCOMES

In setting out a clearly-defined level of achievement, this qualification will:

1. Enhance the knowledge and job satisfaction of learners - providing them with a means of progression to higher level job roles and qualifications.
2. Provide employers with an open and transparent basis for judging the suitability of learners for employment and promotion.
3. Facilitate job movement throughout the timber sector and other related areas of the timber industry.

Specific outcomes for the qualification are listed under the individual unit description.

TARGET GROUP

This qualification is suitable if you are working in a merchant role within the wood and timber industry wanting to gain recognition for the competencies and understanding in one of three strands: buying timber, selling timber and handling timber.

Job role	Type of company
Sales and purchasing personnel (office based and on the road); yard/warehouse personnel	Timber products importer and merchant
Counter sale staff, sales floor operatives. Purchasers	Builders merchant, DIY retail business
Sales and purchasing personnel; yard operatives	Sawmill

ENTRY REQUIREMENTS

There are no entry qualifications or age limits required for this qualification.

Assessment for this qualification is open to any learner who has the potential and opportunity to reach the standards laid down for this qualification. An initial assessment of past experience and current skills, knowledge and understanding should be carried out prior to commencement, to determine suitability for this qualification.

Aids or appliances, which are designed to alleviate disability, may be used during assessment, providing they do not compromise the standard required.

PROGRESSION

Success in this qualification prepares learners for progression in the timber industry. Learners may have the opportunity to progress into supervisory and management roles taking suitable qualifications. Learners are encouraged to consider belonging to a professional institute or similar. Centres are encouraged to make learners aware of relevant associations and related professional bodies.

Success in this qualification enables learners to progress to higher level qualifications, for example the PIABC Level 3 Certificate in Wood Technology and Application, PIABC Level 3 NVQ Diploma in Merchant Supplies – Timber or SVQ in Merchant Supplies – Timber at SCQF Level 7.

After completing this qualification, learners will be able to take on more specialist tasks in their area of expertise and/or move onto the Level 6/7 Modern Apprenticeship.

PROGRAMME ORGANISATION

Programmes leading to the SVQ in Merchant Supplies - Timber at SCQF Level 5 can be organised and delivered by providers who have gained centre and qualification approval from PIABC. To achieve this they need to complete the PIABC centre and qualification approval procedures available from www.piabc.org.uk. In completing the documentation and the approval visit, centres need to demonstrate their ability to deliver high quality education leading to the qualification.

Centres are expected to employ robust quality assurance processes. PIABC will appoint its own moderators to ensure the effective operation of these processes and the maintenance of standards of quality.

The organisation of the qualification is at the discretion of the centre and will take into account the aims, aspirations and experience of the learners.

Centres are encouraged to choose the most suitable curriculum model for their learners. Whilst the sequential delivery of parts of the unit is a possibility and may provide the most

straightforward way of determining completion, it may be that some degree of integration of elements will occur, or that other methods of delivery are more appropriate to meet the needs of learners. It should be noted however that the whole unit and all the learning outcomes will be assessed.

Centres must ensure that adequate arrangements are in place for supporting learners. This could be either through separate tutorial sessions or through the use of time within structured study sessions. Centres using on-line or other forms of open learning must ensure that appropriate tutorial support is provided for learners.

The employer's engagement in learning and assessment opportunities will be paramount in securing timely achievement and a participative role should be encouraged.

In relevant circumstances, centres are recommended to provide career related information and guidance to their learners.

GUIDANCE ON LEARNING AND TEACHING

Learners employed in the timber and related industries will come to the qualification with varying levels of existing knowledge and/or practical experience of some parts of the qualification requirements. Training needs should be identified and gaps in knowledge and competency should be filled with a planned delivery of an individual learning plan. This should be utilised in preparing for teaching and assessment. The sharing of knowledge which has the potential to lead to a high level of understanding should be encouraged by the use of staff with direct experience in the Merchant Supplies - Timber and related industries. This must, of course, be balanced against a sound understanding of the theoretical understanding.

The relationship between theory and practice is a theme that should be reflected in the assessments for the programme. Therefore in structured learning and individual work, learners should be aware of the requirement to develop a theoretical understanding to their practical work and a practical application to their theoretical understanding.

Those developing learning programmes should expect to achieve all the performance and knowledge criteria.

Assessment guidance can be found in the PIABC Centre Handbook for Competence Based Qualifications which should be used alongside the National Skills Academy for Food and Drink's Assessment Strategy for the Wood Sector.

QUALIFICATION DESCRIPTION

The SVQ in Merchant Supplies - Timber at SCQF Level 5 follows the quality criteria for NOS for designing units and qualifications and contains the features listed as follows:

- NOS reference number, title, credit value and level.
- Each unit consists of:
 - Performance criteria: This describes what a learner needs to be able to do as a result of the process of learning.
 - Knowledge and understanding: These are the things learners are expected to know and understand as a result of the process of learning.
 - Some units also indicate the intended scope of the performance criteria

QUALIFICATION LEVEL

This Scottish Vocational Qualification has been credit rated against the Scottish Credit and Qualifications Framework (SCQF) as a Level 5 qualification.

Generally, learners will demonstrate basic knowledge and understanding of processes, materials and terminology relating ideas and knowledge to practical contexts in roles such as purchasing, sales and yard operative. Tasks may include selecting, adjusting and using appropriate tools and materials and/or advising customers using product knowledge.

Learners may be working alone or as part of a team and will show an awareness of the role of others associated with the job role.

QUALIFICATION STRUCTURE

The SVQ in Merchant Supplies - Timber at SCQF Level 5 is made up of mandatory and optional units. The mandatory units cover those areas which have a common approach, such as health and safety, effectiveness, timber and panel product knowledge and the principle learning outcomes for the job role. Learners choose optional job specific units to match their own job roles to confirm skills, competence and the necessary job related knowledge (e.g. purchasing, selling or yard operations).

Credit values are determined by the total notional learning hours (teaching + demonstrations + practice + reflection + assessment - including developing competence in the work environment, etc.) divided by 10. For example 4 credits reflect a total learning time of 40 hours. Learning time is usually much greater than direct tutor contact. Credit values have been calculated unit by unit - in isolation of each other - such that the unit is a stand alone unit; therefore centres may find that where learners are completing a number of units to achieve the complete qualification, actual learning time will reduce (i.e. the actual learning time for the entire qualification is unlikely to be a sum total of the credits of the individual units taken).

Learning time will clearly be reduced if learners hold credits from prior learning. Learners will be expected to carry out additional reading, practice and other work to complete each unit and prepare for assessment.

Structure information: Learners must take 2 mandatory units and a minimum of 4 optional units.

Mandatory Units			
Unit No.	Title	Level	Credit
PROHSS1	Make sure your own actions reduce the risks to health and safety	5	8
PROSM001	Contribute to the effectiveness of work in a commercial setting	5	5
Optional Group A Units			
Unit No.	Title	Level	Credit
PROWTM02	Purchase timber and timber based products in a commercial environment	5	6
PROWTM03	Sell timber and timber based products in a commercial environment	6	6
PROWTM04	Receive and handle timber and timber based products	5	5
PROWTM05	Advise customers on the selection and application of timber and timber based products	5	8

PROWTM06	Pick timber and related products	5	5
PROWTM07	Wrap and pack timber and related products	5	4
PROWTM08	Place timber in storage	5	5
PROWTM09	Process timber and related orders for customers	5	6
PROWTM10	Assemble and load timber and related orders for dispatch	5	5
PROWTM11	Process returned timber and related products	5	3
PROWTM14	Keep timber and related stock at required levels	5	4
SFLWS25	Receive goods	5	3
CFACSA14	Use customer service as a competitive tool	7	8
CFACSA4	Give customers a positive impression of yourself and your organisation	5	5
CFACSA5	Promote additional services or products to customers	5	6
CFACSB2	Deliver reliable customer service	5	5
CFACSD9	Promote continuous improvement	7	7
CFACSF1	Communicate in a customer service environment	4	4
CFACSF2	Deliver customer service within the rules	5	4

UNIT CONTENT

MAKE SURE YOUR OWN ACTIONS REDUCE THE RISKS TO HEALTH AND SAFETY

Unit No: PROHSS1

Unit Level: 5

Unit Credit: 8

Performance Criteria

Identify the hazards and evaluate the risks at work

You must be able to:

- P1 identify which workplace instructions are relevant to your job
- P2 identify those working practices in your job which may harm you or others
- P3 identify those aspects of your work which could harm you or others
- P4 check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others
- P5 deal with hazards in accordance with workplace instructions and legal requirements
- P6 correctly name and locate the people responsible for health and safety at work

Reduce the risks to health and safety at work

You must be able to:

- P7 control those health and safety risks within your capability and job responsibilities
- P8 carry out your work in accordance with your level of competence, workplace instructions, suppliers or manufacturers' instructions and legal requirements
- P9 pass on suggestions for reducing risks to health and safety to the responsible people
- P10 make sure your behaviour does not endanger the health and safety of you or others at work
- P11 follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products
- P12 report any differences between workplace instructions and suppliers' or manufacturers' instructions
- P13 make sure that your personal presentation and behaviour at work:
 - P13.1 protects the health and safety of you and others,
 - P13.2 meets any legal responsibilities, and
 - P13.3 is in accordance with workplace instructions

Knowledge and Understanding

You need to know and understand:

- K1 what "hazards" and "risks" are
- K2 your responsibilities and legal duties for health and safety in the workplace
- K3 your responsibilities for health and safety as required by the law covering your job role
- K4 the hazards which exist at work and the safe working practices which you must follow
- K5 the particular health and safety hazards which may be present in your own job and the precautions you must take
- K6 the importance of remaining alert to the presence of hazards in the whole workplace
- K7 the importance of dealing with, or promptly reporting, risks
- K8 the responsibilities for health and safety in your job description
- K9 the safe working practices for your own job
- K10 the responsible people you should report health and safety matters to
- K11 where and when to get additional health and safety assistance
- K12 your scope and responsibility for controlling risks
- K13 workplace instructions for managing risks which you are unable to deal with
- K14 suppliers' and manufacturers' instructions for the safe use of equipment, materials and products which you must follow
- K15 the importance of personal presentation in maintaining health and safety at work
- K16 the importance of personal behaviour in maintaining the health and safety of you and others

Glossary

Control(s): the means by which the risks identified are eliminated or reduced to acceptable levels.

Hazard: a hazard is something with the potential to cause harm (this can include articles, substances, plant or machines, methods of work, the working environment and other aspects of work management)

Notice: includes all types of enforceable statutory document which may be drafted and served on a duty holder, such as improvement, prohibition and deferred prohibition notices, notices of taking into possession or to leave undisturbed, notices under the Food and Environment Protection Act and the Control of Major Accident Hazards Regulations, as well as approvals and licences, and associated notices of withdrawal, amendment or extension

Personal presentation: this includes personal hygiene, use of personal protective equipment, clothing and accessories suitable to the particular workplace

Procedures: a series of steps, instructions and/or decisions, a task. This includes the documentation prepared by the employer about the procedures to be followed for health, safety and welfare matters. Instructions covering, for example:

- 1 the use of safe working methods and equipment
- 2 the safe use of hazardous substances
- 3 smoking, eating, drinking and drugs
- 4 what to do in the event of an emergency
- 5 personal presentation

Risk: a risk is the likelihood of potential harm from that hazard being realised. The extent of the risk depends on:

- 1 the likelihood of that harm occurring;
- 2 the potential severity of that harm, i.e. of any resultant injury or adverse health effect; and
- 3 the population which might be affected by the hazard, i.e. the number of people who might be exposed.

Stakeholders: is any person(s) or group with an interest in an organisation, which may include, employees (at any level), duty holders, employee representatives, contractors, customers, community

CONTRIBUTE TO THE EFFECTIVENESS OF WORK IN A COMMERCIAL SETTING

Unit No: PROSM001

Unit Level: 5

Unit Credit: 5

This standard covers the skills and knowledge required to contribute to the effectiveness of work in a commercial setting. In particular to plan and organise own work, work effectively with other team members and make a contribution to problem solving and suggesting improvements.

Performance Criteria

Plan and organise own work

You must be able to:

- P1 ensure that you have the required authority to complete the required activity
- P2 comply with current legislation, including working safely
- P3 check that you understand the particular work activity and your role within it
- P4 check that the work area is clean, tidy and free from hazards before starting work
- P5 check that the required resources and equipment are ready for use, before starting work
- P6 check the job documentation, prior to starting work
- P7 complete the activity as planned and without any undue delay
- P8 complete all the required documentation accurately and legibly and pass it on to the next stage

Work effectively with other team members

You must be able to:

- P9 communicate with others, using the appropriate method/s
- P10 give constructive support and feedback to appropriate personnel
- P11 receive support and feedback from personnel
- P12 treat others with respect, at all times

Contribute to problem solving and improvement

You must be able to:

- P13 respond to any problems that occur during a work activity
- P14 report any problems that occur and the actions taken
- P15 identify and share opportunities for improving workplace practices and procedures, using appropriate methods

Knowledge and Understanding

Plan and organise own work

You need to know and understand:

- K1 your job roles, responsibilities and levels of authority
- K2 the current, relevant legislation and how it applies to your job role
- K3 the work activity and your role within that activity
- K4 how to check the work area is clean, tidy and free from hazards, including a list of the hazards and possible consequences of each
- K5 the list of resources that are required for the activity
- K6 how to check that equipment is ready for use
- K7 the relevant documentation and how it should be used
- K8 the relevant workplace procedures for monitoring the progress of the activity and how to keep others informed
- K9 how to complete the relevant documentation and what the next stages are

Work effectively with other team members

You need to know and understand:

- K10 the available methods of communication to use and when to use them
- K11 when assistance may be required and how this may be given
- K12 why it is important to give constructive feedback and support
- K13 how to give constructive feedback and support
- K14 why it is important to receive constructive feedback and support
- K15 why treating other people with respect contributes to workplace efficiency

Contribute to problem solving and improvement

You need to know and understand:

- K16 the most common problems that may occur and how these are resolved
- K17 the reporting procedure for problems that arise
- K18 how to identify opportunities for improvements
- K19 how suggestions for improvements should be made and to whom
- K20 how identifying and making improvements can benefit both you and the organisation

PURCHASE TIMBER AND TIMBER BASED PRODUCTS IN A COMMERCIAL ENVIRONMENT

Unit No: PROWTM02

Unit Level: 5

Unit Credit: 6

Overview

This standard covers the skills and knowledge required to be able to purchase timber and timber based products in a commercial environment. This includes preparing to purchase and purchasing timber and timber based products. The standard is relevant to all employees who are required to purchase stock or customer specific products.

Performance criteria

You must be able to:

1. check suitability of materials to be supplied against specifications
2. calculate costs of intended purchases following standard operating procedures
3. check suitability of delivery and storage options available following standard operating procedures
4. carry out due diligence on the products to be purchased in line with the EU Timber Regulations following standard operating procedures
5. carry out purchasing operations within scope of personal responsibility with due regard to production efficiency and business objectives following standard operating procedures
6. confirm the requirements of the following, following standard operating procedures:
 - materials
 - amounts
 - quality
 - dimensions
 - cost of materials and associated fixings
7. confirm delivery arrangements to meet specifications in relation to:
 - delivery methods
 - times and dates
 - costs
8. confirm storage requirements to meet specifications
9. confirm payment methods following standard operating procedures
10. complete purchases following standard operating procedures
11. determine requirements to facilitate purchases following standard operating procedures to include:
 - minimum stock levels, supplier lead times, replacement order quantity
 - customer specific requirements

Knowledge and understanding

You need to know and understand:

1. main characteristics affecting wood purchasing decisions including:
 - materials
 - transport
 - storage
2. purpose of Chain of Custody and why this is important
3. who needs Chain of Custody Certificates
4. different Chain of Custody schemes and the differences between standards
5. purpose of CE Mark and why this is important
6. why timber and timber based materials and products are subject to origin and supply control certification
7. how timber and timber based materials and products are subject to origin and supply control certification

8. how to carry out due diligence in line with the EU Timber Regulations
9. EU Timber Regulations and why these are important
10. main geographical sources of supply timber and timber based materials and products
11. different storage requirements for products you purchase
12. different delivery arrangements for products you purchase
13. different payment methods used at your company

SELL TIMBER AND TIMBER BASED PRODUCTS IN A COMMERCIAL ENVIRONMENT

Unit No: PROWTM03

Unit Level: 6

Unit Credit: 6

Overview

This standard covers the skills and knowledge required to be able to sell timber and timber based products in a commercial environment. This includes preparing sales areas, demonstrating knowledge of products to customers and concluding sales. The standard is aimed at those working in a wood and timber sales environment.

Performance criteria

You must be able to:

1. check sales areas are suitable for customers following standard operating procedures
2. check stock and materials are in a suitable condition to be sold following standard operating procedures
3. approach customers in a pleasant, friendly and professional manner following standard operating procedures
4. confirm customer requirements following standard operating procedures in relation to:
 - materials
 - amounts
 - quality
 - dimensions
 - costs
5. advise customers on products and materials sold following standard operating procedures
6. calculate costs to ensure cost effectiveness for customers following standard operating procedures
7. confirm delivery arrangements to customers to meet specifications including:
 - full delivery address
 - postcode
 - access for delivery vehicles including weight limits and low bridges
 - parking restrictions
 - mechanical handling requirements
8. process customer payments successfully following standard operating procedures
9. complete sales documents following standard operating procedures
10. carry out sales operations within the scope of personal responsibility and with due regard for excellent customer service, efficiency and business objectives
11. find out what customer is using products for following standard operating procedures
12. sell ancillary products successfully following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. key features of excellent and poor customer services
2. products and materials your company sells and how to advise customers accordingly
3. where information on products is stored and how to access this
4. how to carry out calculations to ensure cost effectiveness for customers
5. formulas used to carry out calculations
6. how to confirm delivery arrangements to customers
7. how to process payment method used by customers
8. how to complete sales documents
9. how to carry out sales operations
10. key features, advantages and limitations of different timbers and timber based products sold at your company and where to access this information
11. procedures for stock control

12. issues of incorrectly recording and managing stock
13. purpose of Chain of Custody and why this is important
14. who needs Chain of Custody Certificates
15. different Chain of Custody schemes and differences between standards
16. purpose of CE Mark and why this is important
17. methods for clarifying and confirming customer requirements
18. main geographical sources of supply of timber and timber based materials and products

RECEIVE AND HANDLE TIMBER AND TIMBER BASED PRODUCTS

Unit No: PROWTM04

Unit Level: 5

Unit Credit: 5

Overview

This standard covers the skills and knowledge required to be able to receive and handle timber and timber based products. The standard is aimed at those working in a wood and timber yard. It is essential that the relevant licences are held to drive mobile plant used within the workplace.

Performance criteria

You must be able to:

1. check products received meet specifications following standard operating procedures
2. check products against the order following standard operating procedures
3. check for defects or deficiencies in orders following standard operating procedures
4. accept, reject or report defects following standard operating procedures
5. check loads have arrived in a safe condition for unloading following standard operating procedures
6. check it is safe to unload goods received following standard operating procedures
7. use safety and lifting equipment to move timber and timber based products following standard operating procedures
8. stack and store timber and timber based products following standard operating procedures
9. check goods are stored in safe condition for future use following standard operating procedures
10. check goods are stored in a suitable manner to stop degradation following standard operating procedures
11. segregate timber and timber based products to meet specifications
12. protect surrounding properties and structures from damage following standard operating procedures
13. identify and deal with problems within the limits of your responsibility and report these following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. main types of timber and timber based products to be received at your company
2. how to check correct products have been received
3. common defects and deficiencies in products and how these can be identified
4. how to accept, reject or report defects
5. differences between untreated and treated timber
6. how to check loads have arrived in safe condition
7. how to check it is safe to unload the goods received
8. purpose of chain of custody and why this is important
9. purpose of CE mark and why this is important
10. methods for clarifying and confirming customer requirements
11. main geographical sources of supply of timber and timber based materials and products
12. safety and lifting equipment to move timber and timber based products
13. how to stack and store timber and timber based products
14. how to store goods in a safe condition for future use
15. how to store goods in a suitable manner to stop degradation
16. how to segregate timber and timber based products
17. how to protect surrounding properties and structures from damage
18. how to identify and deal with problems within the limits of your responsibility and report these to the appropriate person in your company
19. types of safety and lifting equipment used and how to operate

ADVISE CUSTOMERS ON THE SELECTION AND APPLICATION OF TIMBER AND TIMBER BASED PRODUCTS

Unit No: PROWTM05

Unit Level: 5

Unit Credit: 8

Overview

This standard covers the skills and knowledge required to be able to understand timber and timber based products and provide information and guidance to customers. It covers using appropriate questioning techniques, advising customers and providing technical information. The standard is relevant to all employees who work in the wood, timber and related industry.

Performance criteria

You must be able to:

1. advise customers on products and materials your company sells following standard operating procedures
2. use appropriate questioning techniques to get information from customers following standard operating procedures
3. advise customers on suitable uses for different products following standard operating procedures
4. advise customers on types of adhesives to use following standard operating procedures
5. explain limitations of products to customers following standard operating procedures
6. provide technical information on products to customers following standard operating procedures
7. provide information on wood treatments to customers following standard operating procedures
8. find out what customers are using products for following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. products and materials your company sells and how to advise customers accordingly
2. where information on products is stored and how to access this
3. key features, advantages and limitations of different timbers and timber based products sold at your company and where to access this information
4. differences between softwood and hardwood
5. major commercial species and their countries of origin for hardwoods and softwoods
6. how knots are formed
7. differences between live and dead knots
8. what is meant by natural durability in timber
9. main trade sizes for sawn square-edged timber
10. factors influencing pricing of timber
11. how to calculate prices for timber purchases and sales
12. differences between principle systems for grading sawn timber
13. end use applications for strength graded timber and appearance graded timber
14. reasons for drying timber
15. moisture content in wood and effects this has
16. recommended moisture content for end uses of timber
17. methods used to improve durability of timber
18. types of timber preservation
19. manufacturing processes and construction of main types of wood based products
20. categories of adhesives used
21. how grading systems for wood based panels relate to their properties and application
22. differences between carcassing and joinery timber
23. load bearing timbers and their functions

24. strength reducing characteristics in timber
25. visual strength grading
26. principles involved in machine strength grading
27. key differences between a strength grade and a strength class
28. purpose of Chain of Custody and why this is important
29. who needs Chain of Custody Certificates
30. different Chain of Custody schemes and differences between standards
31. purpose of CE Mark and why this is important
32. methods for clarifying and confirming customer requirements
33. main geographical sources of supply of timber and timber based materials and products

PICK TIMBER AND RELATED PRODUCTS

Unit No: PROWTM06

Unit Level: 5

Unit Credit: 5

Overview

This standard is about picking timber and related products ready for dispatch or to assemble orders. It deals with identifying the goods, being aware of potential problems and the use of appropriate picking equipment. This standard is relevant to all operatives working in a timber or wood merchants.

Performance criteria

You must be able to:

1. obtain information required for picking orders following standard operating procedures
2. locate required goods in storage areas to meet specifications
3. apply picking methods specified by the organisation for the type of goods and size of orders
3. use picking equipment following standard operating procedures
5. place goods into receptacles or onto pallets to meet specifications
6. position picked goods to assemble orders to meet specifications
7. identify any problems with picking goods, and take action to deal with them following standard operating procedures
8. question orders if something seems missing following standard operating procedures
9. record work following standard operating procedures
10. comply with organisations procedures and relevant legal, safety and operating requirements relating to picking goods following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. stock recording systems
2. nature and characteristics of goods being picked
3. picking methods used for different types of storage situations
4. types of equipment available for use in picking goods
5. handling methods for different types of goods
6. types of problems arising from picking goods
7. role and responsibilities of different colleagues
8. relevant legal, safety and operating requirements relating to picking goods
9. purpose of chain of custody and why this is important
10. purpose of CE mark and why this is important

WRAP AND PACK TIMBER AND RELATED PRODUCTS

Unit No: PROWTM07

Unit Level: 5

Unit Credit: 4

Overview

This standard covers the skills and knowledge required to wrap and pack timber and related products. It deals with identifying goods, methods and materials for wrapping or packing to safeguard the goods during transportation or storage. It deals with labelling goods and disposal of any waste materials generated during wrapping or packing activities. This standard is relevant to all operatives working in a timber or wood merchants.

Performance criteria

You must be able to:

1. check goods being wrapped or packed meet specifications
2. schedule wrapping or packing of goods to meet specifications
3. protect goods from damage to meet specifications following standard operating procedures
4. use tools and operate equipment following standard operating procedures
5. wrap and pack goods to meet specifications
6. minimise any wastage and take into account any requirements of products following standard operating procedures
7. label packages with information for further action to meet specifications
8. dispose of waste materials following standard operating procedures
9. identify any health, safety and security issues and make provision following standard operating procedures
10. identify any problems and take appropriate action to deal with them following standard operating procedures
11. record work following standard operating procedures
12. comply with organisations procedures and relevant legal, safety and operating requirements following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. sources and types of information on goods being wrapped or packed
2. types of wrapping or packing material and their uses
3. tools and equipment used
4. particular wrapping requirements for different products
5. how to wrap or pack different types of goods without damaging them
6. how to keep wastage to a minimum
7. types of problem arising from wrapping or packing goods
8. how goods can be damaged after leaving sites
9. effects of transportation on wrapping and packing
10. roles and responsibilities of different colleagues
11. relevant legal, safety and operating requirements relating to wrapping or packing of goods

PLACE TIMBER IN STORAGE

Unit No: PROWTM08

Unit Level: 5

Unit Credit: 5

Overview

This standard covers the skills and knowledge for placing timber into storage in order to maximise space, improve distribution and reduce risks. It deals with identifying appropriate locations for size, weight or type of timber including usage or turnover. The standard is aimed at those working in a wood and timber yard. It is essential that the relevant licences are held to drive mobile plant used within the workplace.

Performance criteria

You must be able to:

1. locate timber to be stored to meet specifications following standard operating procedures
2. check timber meets specifications following standard operating procedures
3. confirm storage area is ready to receive goods following standard operating procedures
4. identify any health, safety, and environmental issues following standard operating procedures
5. identify any storage conditions to meet specifications
6. handle timber following standard operating procedures
7. place timber into storage to meet specifications
8. rotate stock to meet specifications
9. identify monitoring and storage arrangements following standard operating procedures
10. record and communicate arrangements to appropriate people following standard operating procedures
11. record information following standard operating procedures
12. comply with organisations procedures and legal, safety and operating requirements following standard operating procedures
13. identify problems with storing goods and take action to deal with them following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. types of timber being stored
2. how to obtain information relating to timber stored
3. areas used for storing specific timber
4. importance of preparation of storage areas, including cleaning, tidying, and clearing obstructions
5. storage conditions for different types of timber
6. types of equipment and facilities used
7. handling methods for different types of timber
8. stock rotation methods
9. reason for timber degradation and how to avoid this
10. importance of positioning timber in storage for further use and to prevent damage
11. health, safety and security issues
12. types of problems found with different types of timber
13. how to use and update stock control systems
14. roles and responsibilities of different colleagues
15. relevant legal, safety and operating requirements relating to placing timber into storage

PROCESS TIMBER AND RELATED ORDERS FOR CUSTOMERS

Unit No: PROWTM09

Unit Level: 5

Unit Credit: 6

Overview

This standard covers the skills and knowledge required for identifying customers order requirements and any problems with orders. It deals with information passed onto customers and how to record information. The standard is aimed at those working in a wood and timber yard. It is essential that relevant licences are held to drive mobile plant used within the workplace.

Performance criteria

You must be able to:

1. obtain information on what customers want and full specifications, drawings following standard operating procedures
2. provide information on timber and products to customers to meet specifications
3. provide customers with delivery information to meet specifications
4. check delivery arrangements with customers to meet specifications including, but not restricted to:
 - possible restrictions for delivery vehicles
 - vehicle access
 - delivery times
 - unloading restrictions
 - hours of access
5. pass on orders and invoicing information to appropriate people following standard operating procedures
6. respond promptly to enquiries about progress of orders following standard operating procedures
7. inform customers promptly orders cannot be delivered within time agreed following standard operating procedures
8. prioritise customer requirements for delivery of orders following standard operating procedures
9. inform customers of any particular product requirements following standard operating procedures
10. take note of lead times and pass information to customers following standard operating procedures
11. deal with customer complaints following standard operating procedures
12. identify any problems with processing orders and take action to deal with them following standard operating procedures
13. store customers details securely following standard operating procedures
14. record information following standard operating procedures
15. comply with procedures and legal, safety and operating requirements following standard operating procedures
16. deal with customer complaints following standard operating procedures
17. identify any problems with processing orders and take action to deal with them following standard operating procedures
18. store customers details securely following standard operating procedures
19. record information following standard operating procedures
20. comply with procedures and legal, safety and operating requirements following standard operating procedures

Knowledge and understanding

You need to know and understand:

1. how to obtain information on what customers want
2. how to interpret specifications and drawings
3. different types of customers you will deal with
4. where to get information on timber and products
5. the impact of the following on deliveries
 - possible restrictions for delivery vehicles
 - vehicle access
 - delivery times
 - unloading restrictions
 - hours of access
6. stock control and ordering systems used in the organisation
7. information required by people who will fulfil orders
8. length of time for orders normally to be fulfilled, and what to do if it is not possible to fulfil an order in the usual time
9. information required for invoicing
10. how to deal with customer complaints regarding missing items or non-delivery of orders following organisational procedures
11. importance of customer confidentiality and how to store customers' personal and financial details securely and who is entitled to see those details
12. roles and responsibilities of different colleagues
13. relevant legal, safety and operating requirements relating to processing orders for customers

ASSEMBLE AND LOAD TIMBER AND RELATED ORDERS FOR DISPATCH

Unit No: PROWTM10

Unit Level: 5

Unit Credit: 5

Overview

This standard covers the skills and knowledge required for assembling timber and related products and making them ready for dispatch to customers. It deals with identifying goods, problems with goods or special instructions affecting delivery. It also covers safe loading of delivery vehicles. The standard is aimed at those working in a wood and timber yard. It is essential that relevant licences are held to drive mobile plant used within the workplace.

Performance criteria

You must be able to:

1. check specifications and identify any health, safety, and environmental issues following standard operating procedures
2. schedule dispatch of goods to meet specifications
3. check work area used is clean and clear of obstructions and hazards following standard operating procedures
4. locate required goods to meet specifications
5. confirm goods are in stock and accessible so they can be dispatched following standard operating procedures
6. identify any special loading or transportation requirements following standard operating procedures
7. check requirements to maintain condition of goods while orders are being assembled following standard operating procedures
8. assemble orders to meet specifications
9. label orders to meet specifications
10. assemble order so goods are protected during delivery to meet specifications
11. deal with damaged/sub-standard goods following standard operating procedures
12. check vehicles are suitable for delivery following standard operating procedures including, but not restricted to:
 - possible restrictions for delivery vehicles
 - vehicle access
 - unloading restrictions
 - weight limits on the delivery route/location
 - height limits on the delivery route/location
 - weight of goods
13. load vehicles to meet specifications
14. check goods are protected during delivery following standard operating procedures
15. check goods are loaded in-line with the delivery routes following standard operating procedures
16. check delivery drivers are supplied with information, including any special loading or transportation requirements relating to the assembly of orders following standard operating procedures
17. identify problems with assembling and loading orders and take appropriate action to deal with them following standard operating procedures
18. record information following standard operating procedures
19. comply with organisations procedures and legal, safety and operating requirements

Knowledge and understanding

You need to know and understand:

1. nature and characteristics of goods assembled
2. how to check specifications and identify any health, safety and environmental issues
3. types of problems arising from assembling orders
4. information required to identify specifications and order requirements
5. how to schedule dispatch of goods
6. location of goods in your workplace
7. how to check goods are in stock
8. special loading and transportation requirements for goods to be assembled
9. how to maintain condition of goods whilst orders are assembled
10. how to assemble orders to specification
11. how to label orders
12. how to protect goods during assembly and delivery
13. how to deal with damaged/sub-standard goods
14. stock recording systems
15. restrictions relating to dispatch of goods
16. types of equipment, facilities and handling methods
17. health, safety, and security issues relevant to assembly of orders
18. how to check vehicles are suitable for delivery including, but not restricted to:
 - restrictions for delivery vehicles on the route
 - vehicle access requirements
 - unloading restrictions
 - weight limits on delivery routes/locations
 - height limits on delivery routes/locations
 - weight of goods on axles
19. how to load goods onto vehicles in an appropriate order
20. how to ensure goods are protected during delivery
21. how to ensure goods are loaded in-line with delivery route
22. how to ensure delivery driver has been supplied with correct information, including any special loading or transportation requirements relating to assembly of orders
23. how to identify problems with assembling and loading orders, and actions to deal with them
24. how to record information
25. relevant legal, safety and operating requirements

PROCESS RETURNED TIMBER AND RELATED PRODUCTS

Unit No: PROWTM11

Unit Level: 5

Unit Credit: 3

Overview

This standard covers the skills and knowledge required for dealing with returned goods whether from customers, clients or within own organisation. It deals with checking goods to identify condition and relabelling if required. This standard is relevant to all operatives within the timber/wood merchants who have authority/responsibility to carry this out.

Performance criteria

You must be able to:

1. confirm types, quantity and condition of goods being returned, and obtain information on reasons for return following standard operating procedures
2. provide relevant details to appropriate people and update stock control systems following standard operating procedures
3. inspect returned goods against reasons for return following standard operating procedures
4. position returned goods in location and check they are kept separately from outgoing stock following standard operating procedures
5. label goods to be returned to suppliers or manufacturers following standard operating procedures
6. dispose of waste packaging following standard operating procedures
7. identify problems with processing returned goods and take actions to deal with them following standard operating procedures
8. record information following standard operating procedures
9. comply with organisations procedures and relevant legal, safety and operating requirements

Knowledge and understanding

You need to know and understand:

1. main reasons customers might return goods
2. organisational policy and procedures for customers' rights to replacements
3. how goods can be returned and how to make arrangements
4. how to inspect returned goods against reasons for return
5. how to dispose of waste packaging
6. when and how to update stock control systems
7. where to put goods for processing or return to suppliers or manufacturers
8. types of problem arising from returned goods
9. who can agree to return of goods and why
10. roles and responsibilities of different colleagues
11. relevant legal, safety and operating requirements relating to processing returned goods

KEEP TIMBER AND RELATED STOCK AT REQUIRED LEVELS

Unit No: PROWTM14

Unit Level: 5

Unit Credit: 4

Overview

This standard covers the skills and knowledge required for checking stock to ensure that appropriate stock levels are maintained. It is also about stock rotation and the identification of stock. This standard is relevant to all operatives at every level.

Performance criteria

You must be able to:

1. establish stock levels required to meet specifications following standard operating procedures
2. check existing stock levels to establish how much is available to meet specifications
3. identify any damaged, faulty, or out of date items and move them to appropriate locations following standard operating procedures
4. rotate stock to ensure stock is utilised effectively to meet specifications
5. handle goods following standard operating procedures
6. label stock to meet specifications
7. position stock in location for further use to meet specifications
8. display stock to meet specifications
9. update stock records following standard operating procedures
10. identify problems and take action to deal with them following standard operating procedures
11. record information following standard operating procedures
12. comply with organisations procedures and legal, safety and operating requirements

Knowledge and understanding

You need to know and understand:

1. why it is important to keep stock at required levels
2. how to check if stock needs replenishing and when to make checks
3. how to recognise damaged, faulty or out of date stock and how to deal with it
4. how to display, position and present stock
5. stock rotation methods for different types of stock
6. handling methods for specific types of goods
7. how to label stock
8. stock control systems used
9. types of problem arising from keeping stock
10. roles and responsibilities of different colleagues
11. relevant legal, safety and operating requirements

RECEIVE GOODS

Unit No: SFL25

Unit Level: 5

Unit Credit: 3

What this standard is about?

This standard is about receiving goods into logistic facilities. It deals with ensuring the correct goods are received and are handled safely, ensuring any risks are identified and that records are kept up-to-date.

Who this standard is for?

This standard is relevant to all operatives at every level in logistics operations. Operatives could, for example, be working in warehousing and storage, transport, or freight forwarding.

Performance Criteria

You must be able to:

- P1 check that the goods being received match the specifications provided in the information
- P2 ensure the area used to receive the goods is clean and free of obstructions and hazards
- P3 ensure that vehicles are safe and secure before unloading from them
- P4 handle goods using the correct handling methods and moving equipment
- P5 ensure that any moving equipment used is operated correctly and safely in accordance with organizational procedures
- P6 ensure that goods are unloaded safely in accordance with storage requirements
- P7 identify any health, safety, and security issues relating to the goods, and make provision for them in accordance with organisational procedures
- P8 identify any problems with receiving the goods, and take the appropriate action to deal with them
- P9 record work according to organisational procedures
- P10 comply with the organisation's procedures and all relevant legal, safety and operating requirements relating to receiving goods

Knowledge and Understanding

You need to know and understand:

- K1 sources and types of information for the goods being received, including information relevant to health, safety, and environmental factors
- K2 characteristics and special requirements of the goods being received
- K3 organisational procedures relevant to the goods being received
- K4 equipment and facilities required in the area to receive goods
- K5 vehicle safety and security during unloading
- K6 handling methods for different types of goods
- K7 methods of safely unloading vehicles
- K8 health, safety, and environmental issues relevant to the storage of goods
- K9 types of problem arising from receiving goods
- K10 how to use and update stock control systems
- K11 roles and responsibilities of different colleagues
- K12 the relevant legal, safety and operating requirements relating to receiving goods

Glossary

1. **Handling methods:** manual, mechanical, gravity
2. **Stock control systems:** manual, computerised, warehouse management systems, radio frequency
3. **Colleagues:** permanent, temporary, agency staff
4. **Legal, safety and operating requirements** safety regulations, codes of practice, load restrictions, working time directive, transport regulations
5. **Equipment:** tools, implements, machinery, lifts, conveyors, cranes, mechanical/manual, PPE

USE CUSTOMER SERVICE AS A COMPETITIVE TOOL

Unit No: CFACSA14

Unit Level: 7

Unit Credit: 8

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Customer service contributes to an organisation's competitive position. Customers of many organisations have choices about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference to which supplier the customer chooses. This Standard is about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services or products. The Standard is not for you if your organisation does not compete actively with others.

Performance criteria

Organise customer service to gain a competitive advantage

You must be able to:

- P1 develop your own and colleagues' understanding of the services or products offered by your organisation
- P2 define your organisation's service offer and the ways in which it compares with those of your competitors
- P3 set an example for colleagues and present an image to your customers that reinforces your organisation's service offer
- P4 encourage customer service actions that create and develop customer loyalty

Deliver a competitive service

You must be able to:

- P5 take positive actions and encourage colleagues to take actions that provide individual customers with added value within your organisation's service offer
- P6 remind your customers about your service offer and the extra benefit it provides over those of your competitors
- P7 offer additional technical advice to customers within your organisation's service offer
- P8 show awareness of the financial implications of any added value actions that you or your colleagues might offer
- P9 meet customer service targets to ensure that your customers see the benefit of dealing with you rather than with a competitor
- P10 re-direct customers to other service providers without causing offence when their expectations cannot be met by your organisation's service offer
- P11 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
- P12 encourage colleagues to offer complementary services or products when customer satisfaction indicates that your customers would be interested in them

Knowledge and understanding

You need to know and understand:

- K1 the factors that lead to customers' belief that they are enjoying value for money
- K2 how to research and compare services or products, including using the internet and social media sources
- K3 the services or products offered by your organisation
- K4 the services or products offered by competitors
- K5 features and benefits of services or products that are seen by customers as added value
- K6 the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
- K7 how to portray a positive image that reinforces your organisation's competitive position
- K8 your organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
- K9 complementary services or products that may be of interest to your customers

GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

Unit No: CFACSA4

Unit Level: 5

Unit Credit: 5

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This Standard is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us, and gives us good information. Every detail of your behaviour counts when dealing with a customer.

Performance criteria

Meet your organisation's standards of appearance and behaviour

You must be able to:

- P1 greet your customer respectfully and in a friendly manner
- P2 communicate with your customer in a way that makes them feel valued and respected
- P3 identify and confirm your customer's expectations
- P4 treat your customer courteously and helpfully
- P5 keep your customer informed and reassured
- P6 adapt your behaviour to respond to different customer behaviour

Respond appropriately to customers

You must be able to:

- P7 respond promptly to a customer seeking help
- P8 choose the most appropriate way to communicate with your customer
- P9 check with your customer that you have fully understood their expectations
- P10 respond promptly and positively to your customer's questions and comments
- P11 allow your customer time to consider your response and give further explanation when appropriate

Communicate information to customers

You must be able to:

- P12 quickly find information that will help your customer
- P13 give your customer information they need about the services or products offered by your organisation
- P14 recognise information that your customer might find complicated and check whether they fully understand
- P15 explain clearly to your customers any reasons why their expectations cannot be met

Knowledge and understanding

You need to know and understand:

- K1 your organisation's standards for appearance and behaviour
- K2 your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- K3 your organisation's rules and procedures regarding the methods of communication you use when dealing with customers
- K4 how to recognise when a customer is angry or confused
- K5 your organisation's standards for timeliness in responding to customer questions and requests for information

PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

Unit No: CFACSA5

Unit Level: 5

Unit Credit: 6

Overview

This unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in competition with others to encourage their customers to try new services or products. This unit is about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation. Because of this everybody offering services or products needs to play a part in making customers aware of what is available. You should not choose this unit if your role does not want you to suggest additional services or products to customers.

Performance criteria

Identify additional services or products that are available

You must be able to:

- P1 update and develop your knowledge of your organisation's services or products
- P2 check with others when you are unsure about new service or product details
- P3 identify appropriate services or products that may interest your customer
- P4 spot opportunities for offering your customer additional services or products that will improve their customer experience

Inform customers about additional services or products

You must be able to:

- P5 choose the best time to inform your customer about additional services or products
- P6 choose the best method of communication to introduce your customer to additional services or products
- P7 give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- P8 give your customer time to ask questions about the additional services or products

Gain customer commitment to using additional services or products

You must be able to:

- P9 close the conversation if your customer shows no interest
- P10 give information to move the situation forward when your customer shows interest
- P11 secure customer agreement and check customer understanding of the delivery of the service or product
- P12 take action to ensure prompt delivery of the additional services or products to your customer
- P13 refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility

Knowledge and understanding

You need to know and understand:

- K1 your organisation's procedures and systems for encouraging the use of additional services or products
- K2 how additional services or products will benefit your customers
- K3 how your customer's use of additional services or products will benefit your organisation
- K4 the main factors that influence customers to use your services or products
- K5 how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- K6 how to give appropriate, balanced information to customers about services or products

DELIVER RELIABLE CUSTOMER SERVICE

Unit No: CFACSB2

Unit Level: 5

Unit Credit: 5

Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is all about how you deliver consistent and reliable service to customers. As well as being good with people, you need to work with your organisation's service systems to meet or exceed customer expectations. In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems. You need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what you have done has met customer expectations. To meet this standard you have to deliver excellent customer service over and over again.

Performance criteria

Prepare to deal with your customers

You must be able to:

- P1 keep your knowledge of your organisation's services or products up-to-date
- P2 ensure that the area you work in is tidy, safe and organised efficiently
- P3 prepare and arrange everything you need to deal with your customers before your shift or period of work commences

Give consistent service to customers

You must be able to:

- P4 make realistic customer service promises to your customers
- P5 ensure that your promises balance the needs of your customers and your organisation
- P6 keep your promises to your customers
- P7 inform your customers if you cannot keep your promises due to unforeseen circumstances
- P8 recognise when your customers' needs or expectations have changed and adapt your service to meet their new requirements
- P9 keep your customers informed if delivery of the service needs to involve passing them on to another person or organisation

Check customer service delivery

You must be able to:

- P10 check that the service you have given meets your customers' needs and expectations
- P11 identify when you could have given better service to your customers and how your service could have been improved
- P12 share information with colleagues and service partners to maintain and improve your standards of service delivery.

Knowledge and understanding

You need to know and understand:

- K1 your organisation's services or products
- K2 your organisation's procedures and systems for delivering customer service
- K3 methods or systems for measuring an organisation's effectiveness in delivering customer service
- K4 your organisation's procedures and systems for checking service delivery
- K5 your organisation's requirements for health and safety in your area of work

PROMOTE CONTINUOUS IMPROVEMENT

Unit No: CFACSD9

Unit Level: 7

Unit Credit: 7

Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard covers the key competence of the customer service professional. You must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. You need to identify potential changes, think through their consequences and make them work. Above all, this Standard covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Performance criteria

Plan improvements in customer service based on customer feedback

You must be able to:

- P1 gather feedback from customers that will help to identify opportunities for customer service improvement
- P2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- P3 discuss with others the potential effects of any proposed changes for your customers and your organisation
- P4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

Implement changes in customer service

You must be able to:

- P5 organise the implementation of authorised changes
- P6 implement the changes following organisational guidelines
- P7 inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- P8 monitor early reactions to changes and make appropriate fine-tuning adjustments

Review changes to promote continuous improvement

You must be able to:

- P9 collect and record feedback on the effects of changes
- P10 analyse and interpret feedback and share your findings on the effects of changes with others
- P11 summarise the advantages and disadvantages of the changes
- P12 use your analysis and interpretation of changes to identify opportunities for further improvement
- P13 present these opportunities to somebody with sufficient authority to make them happen

Knowledge and understanding

You need to know and understand:

- K1 how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- K2 how customer experience is influenced by the way service is delivered
- K3 how to collect, analyse and present customer feedback
- K4 how to make a business case to others to bring about change in the services or products you offer
- K5 how developments in communication channels such as social media present opportunities for customer service improvements

COMMUNICATE IN A CUSTOMER SERVICE ENVIRONMENT

Unit No: CFACSF1

Unit Level: 4

Unit Credit: 4

Overview

This Standard is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

You need to be able to communicate with customers and colleagues using language and concepts that they can understand. This Standard is about the language and basic principles that are at the heart of customer service and the skills you need to communicate effectively with customers and colleagues. It also covers how you fit into the customer service picture in your organisation and the contribution of your job to good customer service. You need to be able to describe and explain the services or products that your organisation offers and how it delivers customer service. This means that you need to use the right language to describe customer service and describe why an organisation needs to balance customer needs with what the organisation is willing and able to provide. Using that language, the Standard will help you to understand how you and your job fit in. Everybody involved in customer service needs to know the customer service content of their job.

Performance criteria

Identify customers and their characteristics and expectations

You must be able to:

- P1 recognise typical customers and their expectations
- P2 discuss customer expectations with colleagues using recognised customer service language
- P3 follow procedures through which you and your colleagues deliver effective customer service

Identify your organisation's services or products

You must be able to:

- P4 outline your organisation's services or products to customers
- P5 list the information you need to deliver effective customer service and where that information can be found
- P6 discuss with colleagues the part you play in delivering your organisation's service offer

Knowledge and understanding

You need to know and understand:

- K1 who your customers are and the differences between an internal customer and an external customer
- K2 your organisation's services or products and how to find information about them
- K3 the connection between customer expectations and customer satisfaction in customer service
- K4 why good customer service is important to any organisation
- K5 why organisational procedures and teamwork are important to good customer service
- K6 the service offer of your organisation and the part you play in delivering it
- K7 who's who and who does what in delivering customer service in your organisation
- K8 the main characteristics of typical customers that you deal with, what impresses them and what might upset or annoy them
- K9 the kinds of information you need to give good service to customers
- K10 typical customer service problems in your work and who should be told about them
- K11 how the way you behave affects your customer's service experience

DELIVER CUSTOMER SERVICE WITHIN THE RULES

Unit No: CFACSF2

Unit Level: 5

Unit Credit: 4

Overview

This standard is part of the Customer Service Theme of Customer Service Foundations. This Theme covers the language and concepts of Customer Service as well as the organisational context and the external environment in which you work. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

There are rules set by organisations about what you can and cannot do for customers. Some of those rules are the result of general responsibilities set by legislation and apply to everybody. Other rules are specific to an industry so are followed by your organisation because of the business you are in. Some rules are set by your organisation alone because of the particular way it wants its customer service to be delivered. This standard requires you to show that you know and understand all the rules that apply to customer service delivered by your organisation and how they apply to you and your job.

Performance criteria

Follow your organisation's customer service practices and procedures

You must be able to:

- P1 follow organisational practices and procedures that relate to your customer service work
- P2 recognise the limits of what you are allowed to do when delivering customer service
- P3 refer to somebody in authority when you need to
- P4 work in a way that protects the security of customers and their property
- P5 work in a way that protects the security of data relating to customers

Follow legislation and external regulation that relate to customer service

You must be able to:

- P6 work in a way that is safe for your customers and your colleagues
- P7 treat customers equally
- P8 respect confidentiality relating to customers and the organisation
- P9 work in a way that shows you are aware of the areas of your job that are covered by legislation and the things you must not do
- P10 work in a way that shows you are aware of the main external regulations that apply to your job and the things you must not

Knowledge and understanding

You need to know and understand:

- K1 organisational practices and procedures that relate to your customer service work
- K2 the limits of what you are allowed to do when delivering customer service
- K3 when and how you should refer to somebody in authority about the rules for delivering customer service
- K4 how you protect the security of customers and their property
- K5 how you protect the security of information about customers
- K6 your health and safety responsibilities as they relate to your customer service work
- K7 your responsibilities to deliver customer service whilst treating customers equally
- K8 why it is important to respect customer and organisation confidentiality
- K9 the main things you must do and not do in your job under legislation that affects your customer service work
- K10 the main things that you must do and not do in your job under external regulations that affect your customer service work

ASSESSMENT

Assessment principles should follow recognised good practice. Assessment guidance can be found in the PIABC Centre Handbook for Competence Based Qualifications which should be used alongside the National Skills Academy for Food and Drink's Assessment Strategy for the Wood Sector.

Simulation is not permitted.

The qualification must be assessed using the following assessment method:

- Portfolio of Evidence

QUALIFICATION CERTIFICATION

All performance and knowledge criteria are to be achieved. This qualification is not grade; certification for this qualification is issued on the basis of awarding a pass only. Whilst there is no grading to this qualification; the training delivery and feedback should promote the notion of continued improvement and craftsmanship.

REGULATORY INFORMATION

Date Accredited From:	25/07/2018
Accreditation End Date:	31/07/2025
Certificate End Date:	31/07/2027

GLOSSARY

Term	Definition
Performance Criteria	This describes what a learner needs to be able to do as a result of the process of learning.
Knowledge and understanding	These are the things learners are expected to know and understand as a result of the process of learning.
Centre	The organisation that is approved by PIABC for the purposes of preparing learners for assessment.

FURTHER INFORMATION

Please contact PIABC Limited directly at:

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