

# Logbook for candidates

NVQ

Edexcel Level 2 NVQ in Road Passenger Transport  
Operations

April 2009

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# Section 1: Edexcel Level 2 NVQ in Road Passenger Transport Operations

## Introduction

This document contains information specific to the Edexcel Level 2 NVQ in Road Passenger Transport Operations. It should be read in conjunction with the *Edexcel NVQ guidance for candidates* that will be provided by your assessor.

## National Occupational Standards and NVQs

The standards, assessment strategy and award structures for Road Transport Passenger Operations are owned by GoSkills, who reviewed these National Occupational Standards. The NVQ has been developed from the National Occupational Standards.

The Edexcel Level 2 NVQ in Road Passenger Transport Operations gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC)/Standard Setting Body (SSB) at:

Go Skills  
Concorde House  
Trinity Park  
Solihull  
Birmingham B37 7UQ  
Telephone: 0121 635 5520  
Fax: 0121 635 5521  
Website: [www.goskills.org](http://www.goskills.org)  
Email: [info@goskills.org](mailto:info@goskills.org)

NVQs are designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice might be permitted. Where this is allowed it will be identified within the evidence requirements for each unit (see page 206). Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

## Which Edexcel NVQs in Road Passenger Transport are available?

- **Edexcel Level 2 NVQ in Road Passenger Transport Operations**

In addition to this NVQ other Edexcel NVQs in the Road Passenger Transport suite are available as follows:

- Edexcel Level 2 NVQ in Passenger Carrying Vehicle Driving (Bus and Coach)
- Edexcel Level 2 NVQ in Road Passenger Vehicle Driving (Community Transport, Hackney Carriage/Private Hire Vehicles and Chauffeurs)
- Edexcel Level 3 NVQ for Managing in Road Passenger Transport
- Edexcel Level 4 NVQ for Managing in Road Passenger Transport

It is important that you select the most appropriate level related to your work role.

## Who is this Edexcel NVQ for?

The Edexcel Level 2 NVQ in Road Passenger Transport Operations is intended for people who are employed in providing a passenger transport operations service for example customer service assistants, controllers, passenger services supervisors, transport planners and transport schedulers.

## What progression opportunity does this Edexcel NVQ offer me?

On completion of the Edexcel Level 2 NVQ in Road Passenger Transport Operations, candidates may progress on to Level 3 qualifications such as the Edexcel Level 3 NVQ for Managing in Road Passenger Transport. This NVQ offers progression to further related vocational qualifications (VRQs) such as the Edexcel Level 2 BTEC Award in Transporting Passengers by Taxi and Private Hire.

## What is the structure of the Edexcel Level 2 NVQ in Road Passenger Transport Operations?

To achieve the whole qualification at Level 2, you must prove competence in **eight units** made up of a combination of **three mandatory units** and **five option units**.

You must choose the **five option** units as follows:

- **one** unit from Section A
- **one** unit from Section B
- **one** unit from Section C
- any **two** other option units from sections A, B or C.

## Mandatory units for the Edexcel Level 2 NVQ in Road Passenger Transport Operations

You must achieve all of the units listed below:

Unit number	Title	Element number	Title
1*	Make sure your own actions reduce risks to health and safety (ENTO HSS1)	1.1	Identify the hazards and evaluate the risks in your workplace
		1.2	Reduce the risks to health and safety in your workplace
2	Achieve effective working relationships with colleagues in road passenger transport operations	2.1	Achieve effective working relationships with your colleagues
		2.2	Achieve effective communications with your colleagues
		2.3	Promote equality and diversity in the workplace
3	Provide professional customer service in road passenger transport operations	3.1	Follow dress and behaviour codes
		3.2	Develop professional relationships with customers
		3.3	Communicate effectively with customers

\*For further details on this unit, please see the table on page 7

## Option units for the Edexcel Level 2 NVQ in Road Passenger Transport Operations

You must achieve **five** of the units listed below.

You must choose **five option** units:

- **one** unit from Section A
- **one** unit from Section B
- **one** unit from Section C
- **any two** other option units from sections A, B or C

Section A			
Unit number	Title	Element number	Title
8	Support learners by coaching in the workplace	8.1	Plan, provide and maintain the coaching process
9	Develop and maintain your work skills and knowledge in road passenger transport operations	9.1	Develop and maintain your work skills and knowledge
10	Manage conflict in road passenger transport operations	10.1	Assess situations and decide on action needed
		10.2	Take action to deal with conflict
11*	Working with computers (AOSG Unit 21)	11.1	Use computer systems and software
		11.2	Maintain the security of data

Section B			
Unit number	Title	Element number	Title
14*	Process customer service complaints (ICS Unit 34)	14.1	Recognise the signs that a query or problem is about to produce a complaint
		14.2	Deal with a complaint effectively
15*	Deal with customers in writing or using ICT (ICS Unit 15)	15.1	Use written or ICT communication effectively
		15.2	Plan and send an effective written or ICT communication
		15.3	Handle incoming written or ICT communications effectively
16*	Deal with customers by telephone (ICS Unit 17)	16.1	Use the telephone system effectively
		16.2	Plan and make focussed telephone calls to your customer
		16.3	Handle incoming calls effectively
17*	Deal with customers face-to-face (ICS Unit 16)	17.1	Communicate effectively with your customer
		17.2	Improve the rapport with your customer through body language
18*	Support customer service improvements (ICS Unit 37)	18.1	Use feedback to identify potential customer service improvements
		18.2	Implement changes in customer service
		18.3	Assist with the evaluation of changes in customer service

Section C			
Unit number	Title	Element number	Title
19	Prepare vehicle and driver rotas for road passenger transport timetabled operations	19.1	Prepare a vehicle rota
		19.2	Prepare a drivers rota
		19.3	Monitor vehicle and driver rotas
20	Implement schedules in road passenger transport operations	20.1	Implement the scheduling of road passenger transport
21	Take telephone bookings in road passenger transport operations	21.1	Identify the prospective passenger's transport requirements
		21.2	Communicate changes to transport arrangements
22*	Sell products or services face-to-face in road passenger transport operations (MSSSB Unit 7.2)	22.1	Sell products or services face-to-face
23*	Sell products or services over the telephone in road passenger transport operations (MSSSB 7.3)	23.1	Sell products or services over the telephone
24*	Recording income and receipts (AOSG Unit 1)	24.1	Process documents relating to goods and services supplied
		24.2	Process receipts
25	Provide support to passengers with a severe disability	25.1	Prepare for the movement of passengers
		25.2	Support passengers during the journey
26	Provide support to passengers who require assistance	26.1	Prepare for journeys with passengers who require assistance
		26.2	Support passengers during the journey
27	Monitor revenue protection and timetables in road passenger transport	27.1	Monitor your organisation's fare policies
		27.2	Monitor timetable adherence

\*For further details on these units, please see the table opposite

Unit number	Unit title	Original unit code	Suite of NOS from which units originate	SSC/SSB that own original unit
1	Make sure your own actions reduce risks to health and safety	(ENTO HSS1)	Health and safety	ENTO
14	Process customer service complaints	(ICS Unit 34)	Customer Service	Institute of Customer Service (ICS)
15	Deal with customers in writing or using ICT	(ICS Unit 15)		
16	Deal with customers by telephone	(ICS Unit 17)		
17	Deal with customers face-to-face	(ICS Unit 16)		
18	Support customer service improvements	(ICS Unit 37)		
22	Sell products or services face-to-face in road passenger transport operations	(MSSSB Unit 7.2)	Sales	Marketing and Sales Standards Setting Body (MSSSB)
23	Sell products or services over the telephone in road passenger transport operations	(MSSSB Unit 7.3)		
11	Working with computers	(AOSG Unit 21)	Payroll and Administration	Accountancy Occupational Standards Group (AOSG)
24	Recording income and receipts	(AOSG Unit 1)	Accountancy	



## Section 2: Worked examples of forms

This section should be read alongside the *Edexcel NVQ guidance for candidates*, which you should get from your assessor. This publication provides a full explanation about:

- NVQ qualifications and how they are assessed
- what evidence is and how you can collect it
- how to build your portfolio logbook
- how to use each recording form.

This is also available on the Edexcel website at:

- [www.edexcel.com/quals/nvq/pages/key-docs](http://www.edexcel.com/quals/nvq/pages/key-docs)

### Collecting your evidence

This section contains completed examples of the forms you, your assessor and the internal verifier will use while you are undertaking your Edexcel Level 2 NVQ in Road Passenger Transport Operations.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit progress and sign-off record
- Form 7: Element achievement record
- Form 8: Knowledge evidence record
- Form 9: Personal statement
- Form 10: Observation record
- Form 11: Witness testimony
- Form 12: Expert witness evidence record
- Form 13: Record of questions and candidate's answers.

You will find a detailed description on how to use these forms in the *Edexcel NVQ guidance for candidates*.

You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.



## Example form 1 – Portfolio title page

<b>Name:</b> Mrs Iris Brown	
<b>Job title:</b> Security Officer	
<b>Name of employer/training provider/college:</b> Green taxis Ltd	
<b>Their address:</b> 57 Old Course Road, Sandcastle, Oldshire	
<b>Postcode:</b> SO38 6XL	
<b>Telephone number (Home):</b> 01234 567890	<b>(Work):</b> 01234 567890
<b>Email address:</b> irisb@greentaxis.co.uk	<b>Fax number:</b> 01234 567891
<b>NVQ:</b> Road Passenger Transport Operations	
<b>Level:</b> 2	
<b>Units submitted for assessment:</b>	
Unit 1 – Make sure your own actions reduce risks to Health and Safety (ENTO HSS1)	
Unit 2 – Achieve effective working relationships with colleagues in Road Passenger Transport Operations	
Unit 3 – Provide professional customer service in Road Passenger Transport Operations	
Unit 8 – Support learners by coaching in the workplace	
Unit 14 – Process customer service complaints (ICS Unit 34)	
Unit 21 – Take telephone bookings in Road Passenger Transport Operations	
Unit 11 – Working with computers (AOSG Unit 21)	
Unit 16 – Deal with customers by telephone (ICS Unit 17)	
<b>Mentor:</b> Emily Coach	
<b>(Please provide details of mentor’s experience):</b>	
Dispatch supervisor with 12 years’ experience of the taxi and private hire industry. Undertaken a number of in-company training courses including Autocab, customer service and telephone techniques	
<b>Assessor:</b> Joanne Cab	<b>Date:</b> 01.01.09



## Example form 2 – Personal profile

<b>Name:</b> Iris Brown	
<b>Address:</b> 18 The Fairways, Sandcastle, Oldshire	
<b>Postcode:</b> SO57 6XL	
<b>Telephone number (Home):</b> 01234 567890	<b>(Work):</b> 01234 567890
<b>Email address:</b> irisb@greentaxis.co.uk	<b>Fax number:</b> 01234 567891
<b>Job title:</b> Telephone operator/dispatcher	
<b>Relevant experience</b>	
<b>Description of your current job:</b>	
<p>I work as a telephone operator/dispatcher in a busy taxi and private hire company. I work flexible hours to take account of busy periods such as Friday and Saturday evenings. My responsibilities are to ensure that all customers' calls are processed efficiently and accurately, these requests are then dispatched to a taxi or private hire driver who is working in my zone of responsibility. Using the GPS screen I can see on my monitor the drivers working in my zone and can choose the vehicle and driver who is closest to the customer or who meets the customer's requirements. I have to be aware that when dispatching vehicles and drivers I follow the company's rules to ensure that all drivers who are queuing for work are treated fairly and impartially.</p> <p>When dispatching a driver to a job I can send a text message directly to a datahead in the vehicle, I can also ensure any customer requirements are met such as wheelchair access or an MPV. I have to be alert to drivers who may be in difficulty with a customer, in some circumstances they may press a panic button to alert me that they are in danger and require advice or assistance from the police.</p> <p>My work is interesting but at busy times can be stressful as the number of customers wanting taxis can exceed the number of vehicles available. This can lead to impatient and angry customers who can be abusive if they are having wait longer than expected. In these circumstances I have to use my customer service skills to defuse the situation and retain customer loyalty.</p>	
<b>Previous work experience or attach copy of a current CV:</b>	
4 years – customer service/telesales	
3 years – taxi driver	

*continued overleaf...*

**Qualifications and training and/or attach copy of a current CV:**

5 GCSEs

BTEC Award in Transporting Passengers by Taxi and Private Hire

Autocab 2 day training course

3 day telesales training with a financial services company

**Voluntary work/interests:**

I am a keen badminton player and enjoy taking my children swimming. I assist in the Sunday School classes at our local church.

**Name of employer/training provider/college:** Green Taxis Ltd

**Address:** 57 Old Course Road, Sandcastle, Oldshire

**Postcode:** SO38 6XL

**Telephone number (Work):** 01234 567890

**Fax number:** 01234 567891

**Email address:** irisb@greentaxis.co.uk

**Type of business, if employer:** Taxi and private hire operator with 50-car fleet

**Number of staff:** 15 full-and part-time staff

**Structure of organisation (including chart or diagram if available):**

Management – 2

Shift supervisors – 3

Drivers and cleaners – 4 full-time employed

Telephonists and dispatchers – 8

Sub-contracted drivers – 75

### Example form 3 – Contents checklist

<b>NVQ title:</b> Level 2 in Road Passenger Transport Operations		
<b>Candidate:</b> Iris Brown		
	<b>Completed?</b>	<b>Page/section number</b>
<b>Title page for the portfolio</b>	✓	1
<b>Personal profile</b> <ul style="list-style-type: none"> <li>• your own personal details</li> <li>• a brief CV or career profile</li> <li>• description of your job</li> <li>• information about your employer/training provider/college</li> </ul>	 ✓ ✓ ✓ ✓	 2 3 3 3
<b>Summary of the units</b>	✓	1
<b>Completed units</b> <ul style="list-style-type: none"> <li>• signed by yourself, your assessor and the internal verifier (where relevant)</li> <li>• reference numbers included</li> <li>• unit assessment plans</li> </ul>	 ✓ ✓ ✓	 4 4 4
<b>Unit progress records</b>	✓	5
<b>Index of evidence (with cross-referencing information completed)</b>	✓	6
<b>Evidence (with reference numbers)</b> <ul style="list-style-type: none"> <li>• observation records</li> <li>• details of witnesses (witness testimony sheets)</li> <li>• personal statements</li> </ul>	 ✓ ✓ ✓	 6 6 6



### Example form 4 – Index of evidence

NVQ title and level:				
Candidate:				
Evidence number	Description of evidence	Included in portfolio (Yes/No) <i>If No, state location</i>	Units/elements evidence links to <i>(give specific numbers, eg 5.2.1)</i>	Internal verifier signature and date of sampling
1	Personal statement	yes	Unit 1 Element 1.1	Joy Club 24.6.08
2	Personal statement	yes	Unit 16	
3	Personal statement	yes	Unit 11 Element 11.1	Joy Club 27.7.08
4	Observation record	yes	Unit 21 Element 21.1	
7	Notes from planning meeting attended by manager	Staff development file	Unit 2 Element 2.2	
11	Witness testimony/ Mr Ian Gibbons	yes	Unit 2 Element 2.1	
13	Diary entry regarding assessment session	unit diary		
15	Expert Witness statement/Mr Driver	yes	Unit 1 Element 1.1, 1.2	Joy Club 10.7.08
22	Record of questions and candidate's answers	yes	Unit 8 Element 8.1	



## Example form 5 – Unit assessment plan

<b>NVQ title:</b> Level 2 in Road Passenger Transport Operations				
<b>Unit:</b> Unit 11 – Working with computers (AOSG Unit 21)				
<b>Candidate:</b> Mrs Iris Brown			<b>Assessor:</b> Joanne Cab	
<b>Normal working activities performed</b>				
	<b>TYPICAL EVIDENCE</b>	<b>WORK AREA</b>	<b>EXPECTED COMPLETION DATE</b>	<b>LINKS TO OTHER UNITS/ELEMENTS</b>
<b>ELEMENT: 11.1 – USE COMPUTER SYSTEMS AND SOFTWARE</b>				
	Performance assessment, witness testimony, hard copy evidence of saved data	workstation c/w with computer, monitor phones, printer, headset and peripherals	10/09/09	3, 16, 21
<b>ELEMENT: 11.2 – MAINTAIN THE SECURITY OF DATA</b>				
	Witness testimony, professional discussion, Q&A	workstation with computer, monitor phones, printer, headset and peripherals	21/10/09	3, 21
<b>Activities needing to be performed</b>				
<b>ELEMENT: 11.1 – USE COMPUTER SYSTEMS AND SOFTWARE</b>				
	3 candidate driver transactions, one of which involves a customer request for a wheelchair	workstation with computer, monitor phones, printer, headset and peripherals	10/09/09	
<b>ELEMENT: 11.2 – MAINTAIN THE SECURITY OF DATA</b>				
	Evidence that personal and work data is saved and secured	workstation with computer, monitor phones, printer, headset and peripherals	21.10.09	

*continued overleaf...*

**Additional comments**

As the candidate's main job role is working with a computer to direct work to external drivers it is important that the evidence for this unit is by direct observation by a qualified assessor. Evidence regarding the candidate's knowledge of the importance of security and legal implications of data protection will be by careful questioning of the candidate using one to one professional discussion. The candidate will also provide hard copy/disc evidence of text/data through saved work.

**Assessor's signature:** Joanna Cab**Date:** 16.5.09**Candidate's signature:** Iris Brown**Date:** 16.5.09

## Example form 6 – Unit progress and sign-off record

NVQ title and level: Level 2 in Road Passenger Transport Operations							
Candidate: Iris Brown							
Assessor: Joanne Cab							
To achieve the whole qualification, you must prove competence in <b>three mandatory</b> units; <b>one</b> unit from <b>each</b> section of A, B and C and any <b>two other</b> option units.							
Unit checklist: list here the units you will be undertaking, then circle the reference number of each unit as you complete it.							
Mandatory	1	2	3				
Section A, B and C	8	14	21				
Option	11	16					

Circle the reference numbers as you complete each unit. You can then easily see what stage you have reached in your NVQ.

Mandatory units			
Unit number	Title	Assessor's signature	Date
1	Make sure your own actions reduce risks to health and safety (ENTO HSS1)	Joanna Cab	4.9.09
2	Achieve effective working relationships with colleagues in Road Passenger Transport Operations	Joanna Cab	5.7.09
3	Provide professional customer service in Road Passenger Transport Operations	Joanna Cab	6.9.09
8	Support learners by coaching in the workplace	Joanna Cab	
14	Process customer service complaints (ICS Unit 34)	Joanna Cab	
21	Take telephone bookings in Road Passenger Transport Operations	Joanna Cab	

This section of the form is for your assessor to sign each time you successfully achieve a unit.

*continued overleaf...*



## Example form 7 – Element achievement record

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations					
<b>Candidate:</b> Mrs Iris Brown					
<b>Assessor:</b> Joanne Cab					
<b>Unit title:</b> Unit 8: Support learners by coaching in the workplace					
<b>Element:</b> 8.1 Plan, provide and maintain the coaching process					
<b>Performance criteria:</b> You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>			
1	Understand the role of the coach	1.7.09	1.8.09	15.9.09	2.10.09
2	List the personal attributes of an effective coach	1.7.09	1.8.09	15.9.09	2.10.09
3	List the benefits that can derive from coaching	1.7.09		15.9.09	
4	Identify learners needs and the resources and facilities required to undertake the coaching role to help learners meet the needs of their learning needs	1.7.09	1.8.09	2.10.09	
<b>Evidence requirements:</b>					
Professional discussion		2.9.09			
Professional discussion		15.9.09			
Question and answer session		9.10.09			
<b>Range:</b>		<i>(Use the boxes to record range with reference to element requirements)</i>			
New employee		8.1.4			
Small group discussion		8.1.7			
Written communication		8.1.5			
Individuals undertaking training		8.1.7			

*continued overleaf...*

**Feedback/comments:**

You have approached this element with enthusiasm and commitment and all aspects of performance are fully satisfied by the evidence you have produced. Your willingness to seek feedback and evaluate your own performance has been exemplary. Well done.

**Assessor's signature:** Joanna Cab**Date:** 2.10.09**Candidate's signature:** Iris Brown**Date:** 2.10.09

## Example form 8 – Knowledge evidence record

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations									
<b>Candidate:</b> Iris Brown					<b>Assessor:</b> Joanne Cab				
<b>Unit title:</b> Provide Professional Customer Service in Road Transport Operations									
<b>Element:</b> 3.2 – Develop Professional Relationships with Customers									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a your organisation's policy and procedures for promoting customer service									✓
b the limits of your own authority, knowledge and responsibility in matters relating to customer service									✓
c what customer service information will benefit, or is needed by, your organisation							✓		
d the sorts of difficulties or problems that can arise in promoting customer service								✓	
e the procedures for referring or reporting customer service issues to other appropriate people in your organisation and rules governing confidentiality							✓ 1.8. 09		
f how to identify and provide for customers with special needs			✓						
g the importance of making sure you treat everyone equally when providing the service				✓					
h the make-up of the passenger transport industry at national and local level							✓		

*continued overleaf...*

**Feedback/comments:**

You have successfully completed the knowledge evidence for Unit 3 Element 3.2. We will now update your assessment plan to complete the remaining part of this unit

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:** Iris Brown

**Date:** 22.9.09

**Assessor's signature:** Joanne Cab

**Date:** 22.9.09

**Internal verifier's signature:** Joy Club

**Date:** 15.9.09

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Example form 9 – Personal statement

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations				
<b>Unit/element(s):</b> 11.1				
<b>Candidate:</b> Iris Brown				
<b>Purpose of statement:</b> To provide knowledge and understanding evidence for element 11.1				
<b>Evidence index number:</b> 3				
Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements and PCs covered
27.7.08	3	<p>Before starting my shift, I arrange the desk and chair so that I can sit comfortably and have enough space for my keyboard and mouse. I adjust the chair and monitor height so that the screen is at eye level and the anti-glare screen is employed.</p> <p>I also undertake a quick visual check of all leads and peripheral systems to ensure there are no poor connections or trailing leads that can present a danger to passing colleagues.</p> <p>I enter my personal password and begin the process of accepting customer calls. I have been trained in telephone techniques so I try to be as friendly and informative as possible. Accuracy is important and I have to make sure that I have all the information needed to pass on to the driver.</p> <p>I ensure that telephone bookings are saved so that any disputes that arise can be quickly resolved.</p> <p>All our drivers/vehicles have coded numbers and can be seen on my monitor screen in real time, I have to make important decisions on which driver is best placed to accept a booking, this has to be done fairly so that all drivers have a share of the 'cake'.</p> <p>When my shift is finished I ensure that all work is saved to file and where appropriate important information is passed to my immediate superior or to my shift replacement.</p>	<p>Unit 1, 1.1</p> <p>PC 1,2,3</p> <p>Unit 3, 3.2</p> <p>PC 1,3,4,5, 6</p>	<p>11,11.1</p> <p>PC</p> <p>1,2,3,4,5,6,7</p>
<b>Candidate's signature:</b> Iris Brown			<b>Date:</b> 10.9.09	
<b>Assessor's signature:</b> Joanne Cab			<b>Date:</b> 10.9.09	



## Example form 10 – Observation record

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations	
<b>Unit/element(s):</b> 21.1	
<b>Candidate:</b> Iris Brown	<b>Date of observation:</b> 21.09.08
<b>Evidence index number:</b> 4	
<b>Skills/activities observed:</b>	<b>PCs and range covered:</b>
<p>I observed you accepting a number of incoming calls from customers requiring taxis or private hire vehicles. You were polite to each customer, asking appropriate questions when required to ensure that no doubt existed regarding the hire arrangement. When asked for a quotation you were able to quote it directly or when unsure you clarified it with your supervisor.</p> <p>You summarized the request, and quickly passed on the details to a waiting driver accurately and in a friendly manner.</p> <p>One customer requested that a guide dog to be carried; you correctly explained that would not be a problem and there is no extra charges guide dogs.</p> <p>You ensured a record was kept of the phone conversations for the operator and licensing authority.</p>	21.1 (1,2,3,4,5,6,7)
<b>Knowledge and understanding apparent from this observation:</b>	
You have good telephone techniques and know how to communicate with callers. Your questioning technique was excellent and you have good knowledge of the legal requirements for saving and storing data. You were able to demonstrate your knowledge of the Carriage of Guide Dogs DDA 1995 (2001)	
<b>Other units/elements to which this evidence may contribute:</b>	
3 and 16	
<b>Assessor comments and feedback to candidate:</b>	
Your performance in this observation was very good; you were polite, friendly and accurate in all your incoming and outgoing calls. You were able to maintain this composure during a particularly busy period when things became hectic with incoming calls beginning to overtake the number of vehicles available.	
I can confirm the candidate's performance was satisfactory.	
<b>Assessor's signature:</b> Joanne Cab	<b>Date:</b> 21.09.09
<b>Candidate's signature:</b> Iris Brown	<b>Date:</b> 21.09.09



## Example form 11 – Witness testimony

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations	
<b>Candidate name:</b> Iris Brown	
<b>Evidence index number:</b> 11	
<b>Where applicable, evidence number to which this testimony relates:</b>	
<b>Unit:</b> 2	
<b>Element(s):</b> 2.1	
<b>Range:</b> PC 1-9	
<b>Date of evidence:</b> 13.07.08	
<b>Witness name:</b> Ian Gibbons	
<b>Relationship to candidate:</b> Shift Supervisor	
<p><b>Details of testimony:</b></p> <p>I have worked with Iris for 3 years and can vouch for the professionalism and dedication that Iris shows to her work. In particular she is a team player and takes special interest in helping new staff settle in quickly.</p> <p>Conflicts can easily arise when stress levels rise during very busy times, Iris can calm things down and steady the ship.</p> <p>Iris is always punctual, helpful and obliging.</p>	
I can confirm the candidate's evidence is authentic and accurate.	
<b>Witness signature:</b> Ian Gibbons	
<b>Name:</b> Ian Gibbons	<b>Date:</b> 13.07.08
<b>Contact telephone number:</b> 01234 567890	

<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE NVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING



## Example form 12 – Expert witness evidence record

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations	
<b>Candidate name:</b> Iris Brown	
<b>Evidence index number:</b> 15	
<b>Where applicable, evidence number to which this testimony relates:</b>	
<b>Unit:</b> 1	
<b>Element(s):</b> 1.1 and 1.2	
<b>Date of evidence:</b> 10.07.09	
<b>Expert witness name:</b> Mr Driver	
<b>Relationship to candidate:</b> Manager and owner	
<p><b>Details of testimony:</b></p> <p>As owner and manager of Green Taxis I have responsibility for the health and safety of my staff and any customers and visitors to our premises. I regularly carry out safety audits to ensure our staff are working within the health and safety policy of the company.</p> <p>I have always found our employee Iris Brown a most capable and diligent employee on health and safety matters.</p> <p>Iris has actively assisted during these health and safety audits and made contributory remarks and practical suggestions which have been subsequently used for inclusion in our health and safety policy.</p> <p>I have no hesitation in confirming Iris's competence in all the health and safety outcomes including the related knowledge of the unit in question.</p>	
I can confirm the candidate's evidence is authentic and accurate.	
<b>Expert witness signature:</b> David Driver	
<b>Name:</b> David Driver (manager)	<b>Date:</b> 10.7.08
<b>Contact telephone number:</b> 01234 567 890	

<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input type="checkbox"/>	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
<input checked="" type="checkbox"/>	CURRENT EXPERTISE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE NVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING



## Example form 13 – Record of questions and candidate’s answers

<b>NVQ title and level:</b> Level 2 in Road Passenger Transport Operations	
<b>Candidate name:</b> Iris Brown	
<b>Unit:</b> 8	<b>Elements(s):</b> 8.1
<b>Evidence index number:</b> 22	
<p><b>Circumstances of assessment:</b></p> <p>These questions are to clarify some of the points and issues that arose during the coaching plan and session I witnessed last Thursday on the 14th of September</p>	
<b>List of questions and candidate’s responses:</b>	
<p><b>Q:</b> When deciding to coach a new or existing member of staff in acquiring new skills, you have to ensure that you explain to the staff member the step by step goals that form part of the overall skills plan.</p> <p>Here are number of step-by-step goals that a good coach should know before embarking on a coaching challenge. Please put these steps in the correct order – review, coach, train, induct, practice and new goal</p> <p><b>A:</b> I don't think my coaching plan fully explained to the staff member that coaching was only a part of the skills process. I now realise that I should have fully explained to the candidate that coaching also involves; in order – induction, train, coach, practice, and review skills before moving on to new goals and challenges.</p>	
<p><b>Q:</b> 'Push' and 'Pull' are the two extreme ends of the coaching process, what do you understand about these styles of coaching?</p> <p><b>A:</b> Push is where I do most of the talking or instructing, for example, I give clear answers to the coachee's questions or to show him or her the correct way to do a specific task. This type of coaching is very useful for new staff who have a low skill base and low self reliance.</p> <p>Pull is where I encourage the candidate to provide most off the answers and to solve particular problems during a coaching session. This type of coaching is very useful for a candidate who is confident and self reliant.</p> <p>I always select the style most appropriate for the candidate's development and the objectives required</p>	
<b>Assessor’s signature:</b> Joanne Cab	<b>Date:</b> 9.10.09
<b>Candidate’s signature:</b> Iris Brown	<b>Date:</b> 9.10.09



## Section 3: Logbook

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# Mandatory units



## Unit summary sheet

# Unit 1: **Make Sure Your Own Actions Reduce Risks to Health and Safety (ENTO HSS1)**

### What is the unit about?

The health and safety responsibilities for everyone in your workplace. It describes the competences required to make sure that:

- your own actions do not create any health and safety hazards
- you do not ignore significant risks in your workplace, and
- you take sensible action to put things right, including reporting situations which pose a danger to people in the workplace and seeking advice

Fundamental to this unit is an understanding of the terms 'hazard', 'risk' and 'control'.

### Who is this unit for?

All those in road passenger transport

### Links to other units

This unit is from the ENTO suite of standalone National Occupational Standards for Health and Safety where it appears as unit HSS1.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 1 Make Sure Your Own Actions Reduce Risks to Health and Safety (ENTO HSS1)				
<b>Element:</b> 1.1 Identify the hazards and evaluate the risks in your workplace				
<b>Performance criteria:</b> You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify which workplace instruction are relevant to your job			
2	identify those working practices in your job which could harm you or others			
3	identify those aspects of your workplace which could harm you or others			
4	check which of the potentially harmful working practices and aspects of your workplace present the highest risks to you or to others			
5	deal with hazards in accordance with workplace instructions and legal requirements			
6	correctly name and locate the people responsible for health and safety in your workplace			
7	report to the people responsible for health and safety in your workplace those hazards which present the highest risks.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 1 Make Sure Your Own Actions Reduce Risks to Health and Safety (ENTO HSS1)				
<b>Element:</b> 1.2 Reduce the risks to health and safety in your workplace				
<b>Performance criteria:</b> You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	carry out your work in accordance with your level of competence, workplace instructions, suppliers or manufacturers instructions and legal requirements			
2	control those health and safety risks within your capability and job responsibilities			
3	pass on suggestions for reducing risks to health and safety to the responsible people			
4	make sure your behaviour does not endanger the health and safety of you or others in your workplace			
5	follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products			
6	report any differences between workplace instructions and suppliers' or manufacturers' instructions			
7	make sure that your personal presentation and behaviour at work: <ul style="list-style-type: none"> <li>protects the health and safety of you and others</li> <li>meets any legal responsibilities, and</li> <li>is in accordance with workplace instructions</li> </ul>			
8	make sure you follow environmentally-friendly working practices.			

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 1 Make Sure Your Own Actions Reduce Risks to Health and Safety (ENTO HSS1)</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a what 'hazards' and 'risks' are									
b your responsibilities and legal duties for health and safety in the workplace									
c your responsibilities for health and safety as required by the law covering your job role									
d the hazards which exist in your workplace and the safe working practices which you must follow									
e the particular health and safety hazards which may be present in your own job and the precautions you must take									
f the importance of remaining alert to the presence of hazards in the whole workplace									
g the importance of dealing with, or promptly reporting, risks									
h the responsibilities for health and safety in your job description									
i the safe working practices for your own job									
j the responsible people you should report health and safety matters to									

*continued overleaf...*

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
k where and when to get additional health and safety assistance									
l your scope and responsibility for controlling									
m workplace instructions for managing risks which you are unable to deal with									
n suppliers' and manufacturers' instructions for the safe use of equipment, materials and products which you must follow									
o the importance of personal presentation in maintaining health and safety in your workplace									
p the importance of personal behaviour in maintaining the health and safety of you and others									
q the risks to the environment which may be present in your workplace and/or in your own job									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Glossary

This section provides explanations and definitions of some of the terms used in this unit.

<b>Control(s)</b>	The means by which the risks identified are eliminated or reduced to acceptable levels.
<b>Employer</b>	A person, firm, association, organisation, company or corporation employing one or more workers and has responsibility for the workplace/work activity.
<b>Hazard*</b>	<p>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).</p> <p><b>*Definition taken from: HSE 'Management of health and safety at work – Approved Code of Practice &amp; Guidance'. Reference L21 (ISBN 0-7176-2488-9)</b></p>
<b>Learner</b>	Any person in a workplace environment and undertaking learning, including those following a vocational or academic course.
<b>Legislation</b>	<p>There are many Acts of Parliament, Statutory Instructions, Regulations and orders relating to health and safety which affect people at work.</p> <p>For example; there are regulations for those who, for example, work with electricity, or work on construction projects, as well as regulations covering noise at work, manual handling, working with VDUs, or dealing with substances hazardous to health, etc.</p> <p>The Health and Safety at Work Act 1974 is the main piece of legislation under which nearly all the other regulations are made.</p>
<b>Manager</b>	An individual charged with the responsibility for managing staff, and/or resources and processes.
<b>Other people</b>	Refers to everyone covered by the Health and Safety at Work Act including: visitors, members of the public, colleagues, contractors, clients, customers, patients and students.
<b>Personal presentation</b>	This includes personal hygiene, use of personal protective equipment, clothing and accessories suitable to the particular workplace.

*continued overleaf...*

<b>Risk*</b>	<p>A risk is the likelihood of potential harm from that hazard being realised.</p> <p>The extent of the risk depends on:</p> <ul style="list-style-type: none"> <li>i the likelihood of that harm occurring;</li> <li>ii the potential severity of that harm, ie of any resultant injury or adverse health effect; and</li> <li>iii the population which might be affected by the hazard, ie the number of people who might be exposed.</li> </ul> <p><b>*Definition taken from: HSE ‘Management of health and safety at work – Approved Code of Practice &amp; Guidance’. Reference L21 (ISBN 0-7176-2488-9)</b></p>
<b>Resources</b>	This includes: information, documentation, time, control measures, staff/people, equipment and support (including specialist assistance).
<b>Responsible person/people</b>	The person or people at work to whom any health, safety and welfare issues or hazards should be reported. This could be a supervisor, line manager, director or your employer.
<b>Supervisor</b>	One who controls and or directs the work of others.
<b>Training provider</b>	An organisation or individual (usually external) responsible for providing the training, work experience, and/or formal assessment for the learner.
<b>Worker</b>	A person performing services for an employer under a contract of service or an apprenticeship. Workers include; outworkers, those employed on a casual basis, in training and volunteers.
<b>Workplace</b>	The single or multiple areas in which you carry out your work.
<b>Working practices</b>	All activities, procedures, use of materials, substances or equipment and working techniques used in carrying out a work or job related task. This includes procedures for reporting hazards and unsafe working practices.

**Workplace instructions**

An organisation's instructions, method statements, safe systems of work, guidelines and processes on how to behave and perform tasks in the workplace.

Within these national occupational standards 'Workplace instructions' has been used to include:

**POLICIES**

- A statement which directs the present and future decisions of an organisation.
- It is intended to influence and determine decisions, actions, and other matters.
- Typically, a policy designates a required process or procedure within an organisation.
- They are often initiated because of some external requirement.

**PROCEDURES**

- A series of steps following in a regular definite order that implements a policy
- A series of steps or instructions, describing a way of doing things.
- A series of steps to be performed in a regular definite order under specified conditions.
- Documented processes that are used when work affects more than one function or department of an organisation.
- A series of clearly defined steps (and decisions) that explains or describes how one goes about completing a task.

This includes the documentation prepared by the employer about the procedures to be followed for health, safety and welfare matters.

This may be the employer's safety policy, general health and safety statements and written safety procedures covering aspects of the workplace that should be drawn to the attention of employees and that of everyone covered by the Health and Safety at Work etc Act 1974 (visitors, members of the public, colleagues, contractors, clients, customers, patients, students).

Instructions covering, for example:

- a use of safe working methods and equipment
- b safe use of hazardous substances
- c smoking, eating, drinking and drugs
- d what to do in the event of an emergency
- e personal presentation



## Unit summary sheet

# Unit 2: Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations

### What is the unit about?

This unit is about achieving effective positive working relationships with your colleagues and recognising the importance of equality and diversity in the workplace.

You should know and understand the effects of negative behaviour on working relationships. Effective communication with colleagues is an important part of this unit.

This unit consists of three elements:

Element 2.1 – Achieve Effective Working Relationships with Your Colleagues

Element 2.2 – Achieve Effective Communications with Your Colleagues

Element 2.3 – Promote Equality and Diversity in the Workplace.

#### *Element 2.1*

This element is about how you behave professionally and socially towards your colleagues. This should be in a way that maintains goodwill in the workplace. This will include how you respond to colleagues and give help or information. These colleagues include your co-workers, supervisors or managers, and possibly trainees. If you agree to do something for a colleague, it should not negatively affect your own work. It should also be within the limits of your responsibility and you should do it within the agreed timescale. You should know how to get help to sort out any problems you have with working relationships with a colleague.

#### *Element 2.2*

This element is about how you communicate with your colleagues in a positive way that helps you and them to work effectively. This means that you will be able to get and give information in written, verbal or electronic formats as appropriate to your work. You will also need to be able to get information that meets your needs, and provide information that meets the needs of your colleagues. You will need to know the limits of your authority and responsibility relating to getting and giving information. You should know how to get help to sort out any problem you have in communicating with colleagues.

#### *Element 2.3*

This element is about promoting equality and diversity in the workplace. You should be able to make sure your behaviour, words and actions promote equality and diversity. You should know and understand your statutory obligations and your organisation's policy on equality and diversity.

*continued overleaf...*

**Who is this unit for?**

This unit is for all those working in road passenger transport operations including drivers and those in passenger support roles.

**Glossary***Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

*Colleague*

A person in your own or other organisations with whom you work.

**Links to other units**

This unit is imported from the *GoSkills* Road Passenger Vehicle Driving suite where it appears as unit 7.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 2 Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations				
<b>Element:</b> 2.1 Achieve Effective Working Relationships with Your Colleagues				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	behave towards colleagues in a polite way			
2	respond to requests from colleagues promptly and willingly, without disrupting your own work too much			
3	meet any undertakings you have given to colleagues within the agreed way and timescale			
4	provide information your colleagues ask for that is accurate, clear and given promptly			
5	take part as necessary in discussions about working relationships			
6	support colleagues who are learning, to help develop their skills and knowledge			
7	discuss problems with the appropriate person if there are difficulties in working relationships, or work practices			
8	Identify potential areas of conflict with colleagues			
9	negotiate with colleagues to sort out conflict situations.			

*continued overleaf...*

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 2 Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations				
<b>Element:</b> 2.2 Achieve Effective Communications with Your Colleagues				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	get the information you need from colleagues using your organisation's procedures			
2	give information to colleagues that is relevant and will meet their needs			
3	communicate information in a format that is appropriate to your work			
4	confirm that you are authorised to give the information you provide			
5	get help in cases where you have difficulty in communicating effectively with your colleagues			
6	identify weaknesses with your own communication skills.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 2 Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations				
<b>Element:</b> 2.3 Promote Equality and Diversity in the Workplace				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	make sure that your behaviour, words and actions promote equality and diversity in the workplace			
2	identify your personal responsibilities and liabilities under equality legislation and relevant codes of practice			
3	identify prejudice, discrimination and bullying in the workplace			
4	deal with incidents of prejudice, discrimination and bullying in the workplace within the limits of your own authority and your organisation's procedures.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 2 – Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations</p> <p><b>Element:</b> 2.1 Achieve Effective Working Relationships with Your Colleagues</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the need for effective working relationships and goodwill in the workplace									
b your organisation's standards and guidelines relating to behaviour in the workplace									
c how to balance giving help to colleagues with your own workload									
d the limits of your own and your colleagues responsibilities									
e the learning needs of colleagues who are being trained									
f your organisation's procedures for dealing with and discussing difficulties in working relationships									
g your organisation's procedures for dealing with conflict within the workplace									
h the skills that could be used to sort out conflicts and deal with aggressive behaviour in the workplace									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 2 – Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations</p> <p><b>Element:</b> 2.2 Achieve Effective Communications with Your Colleagues</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the need for accurate and relevant information to be communicated within the workplace									
b the methods of getting and giving information between colleagues									
c the limits of your authority relating to providing information									
d the different formats in which you can communicate information and their uses									
e the need for providing, and ways to provide, colleagues with opportunities to communicate freely and openly									
f your organisation’s procedures for dealing with and reporting difficulties in communicating freely and openly									
g how to identify and deal with weaknesses with your own communication skills									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations											
<b>Candidate:</b>					<b>Assessor:</b>						
<p><b>Unit title:</b> Unit 2 – Achieve Effective Working Relationships with Colleagues in Road Passenger Transport Operations</p> <p><b>Element:</b> 2.3 Promote Equality and Diversity in the Workplace</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>											
<b>Knowledge and understanding for this unit:</b>				<b>Type of evidence</b>							
				EI	O	P	WT	S	APEL	Q&A Date	EWE
You must know and understand:											
a why equality and diversity in the workplace is important											
b what can cause prejudice and discrimination in the workplace											
c your organisation’s policy on equality and diversity											
d relevant legislation and codes of conduct aimed at achieving equality and diversity											
e your responsibility regarding equality and diversity in the workplace.											

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 3: Provide Professional Customer Service in Road Passenger Transport Operations

### What is the unit about?

This unit is about providing professional customer service. You should be able to maintain a professional image to your customers, give customers information and provide customer service. You should know and understand your organisation's procedures relating to customer service and the way in which your own behaviour impacts on you and your organisation. Communicating with customers is an important feature of this unit.

This unit consists of three elements:

Element 3.1 – Follow Dress and Behaviour Codes

Element 3.2 – Develop Professional Relationships with Customers

Element 3.3 – Communicate Effectively with Customers.

#### *Element 3.1*

This element is about how you show that you know and follow the relevant codes of dress, appearance and behaviour. While following codes of dress and behaviour, you should present a professional image to your customers in the way you relate to them, including during conversations. Your customers include people from inside your organisation as well as from outside it. You should also make sure you carry out your work in a way that does not cause unnecessary inconvenience to your customers, and show that you can deal effectively with difficulties that may arise

#### *Element 3.2*

This element is about how you show that you can keep to your organisation's policies and procedures on customer service. This covers, for example, acknowledging and communicating with customers, some of whom could be 'difficult', in a friendly and helpful way. You should be able to refer customers to the appropriate person if you cannot help them, or if it is outside your responsibility. It also includes exchanging verbal or written information related to customer service. You should also be able to identify and report possible difficulties in developing customer service, such as those relating to services, products or personalities.

#### *Element 3.3*

This element is about how to use effective communication to give your customers information they need. This communication will be verbal and non-verbal. The way in which you respond to customers' requests for information should be positive, helpful and appropriate to their needs. After giving your customers information, you should be able to confirm it was enough to meet their needs and that they understood you. Any information you do give should be within your own limits of knowledge and authority. You will also need to know and follow your organisation's codes of behaviour and customer service. If you have difficulties communicating with your customers, some of whom may be difficult, you should be able to get help or advice from the appropriate person.

*continued overleaf...*

**Who is this unit for?**

This unit is for those working in road passenger transport operations.

**Links to other units**

This unit is based on Unit 3 from the *GoSkills* Road Passenger Vehicle Driving suite.

**Glossary***Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

*Customer*

Includes passengers.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
<b>Element:</b> 3.1 Follow Dress and Behaviour Codes				
<b>Performance criteria:</b> You must be able to:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	behave towards customers in a polite and helpful way			
2	consistently follow the relevant code of dress and personal appearance			
3	put a professional image across to your customers by behaving appropriately at all times			
4	hold conversations with customers in a polite and helpful way taking account of differing situations			
5	carry out your work in a way that reduces inconvenience to your customers as far as possible.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
<b>Element:</b> 3.2 Develop Professional Relationships with Customers				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	acknowledge customers promptly and politely, and speak to them in a way that shows you are being friendly and helpful and gives them confidence in your organisation			
2	give customers information that is within your own limits of authority			
3	carry out approved procedures and policies for promoting customer service including customers with special needs			
4	refer customers to other appropriate people if you do not have the knowledge to help them or if it goes beyond your responsibilities			
5	accurately and fully record information from customers that relates to your organisation respecting as appropriate confidential information			
6	identify and report, to the appropriate person, possible difficulties that could affect customers			
7	identify other main providers of passenger transport related to your organisation's activity.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
<b>Element:</b> 3.3 Communicate Effectively with Customers				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	behave towards your customers in line with your organisation's code of customer service			
2	communicate with your customers in a way that is appropriate to their needs and respecting confidentiality			
3	agree as appropriate a route or plan with customers			
4	respond to your customers' requests for information in a positive and helpful way within the limits of your knowledge and authority which will give them a positive image of your organisation			
5	confirm with your customers that the information you have given is helpful and understood			
6	maintain standards of behaviour in line with providing a service			
7	deal effectively with communication problems in line with your organisation's guidelines, which could include getting help or advice.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations									
<b>Element:</b> 3.1 Follow Dress and Behaviour Codes									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the importance for the organisation of the standards of service provided									
b why it is important to have and follow codes of appearance and behaviour									
c the relevant codes of dress, appearance and behaviour									
d how to deal with difficulties in meeting codes of dress and behaviour									
e how to recognise opportunities to improve the service you give to customers									

*continued overleaf...*

**Feedback/comments:**

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**Date:**

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## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations									
<b>Element:</b> 3.2 Develop Professional Relationships with Customers									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a your organisation's policy and procedures for promoting customer service									
b the limits of your own authority, knowledge and responsibility in matters relating to customer service									
c what customer service information will benefit, or is needed by, your organisation									
d the sorts of difficulties or problems that can arise in promoting customer service									
e the procedures for referring or reporting customer service issues to other appropriate people in your organisation and rules governing confidentiality									
f how to identify and provide for customers with special needs									
g the importance of making sure you treat everyone equally when providing the service									
h the make up of the passenger transport industry at national and local level									

*continued overleaf...*

**Feedback/comments:**

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**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations									
<b>Element:</b> 3.3 Communicate Effectively with Customers									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the forms of verbal and non-verbal communication									
b your organisation's procedures for keeping customers informed									
c how to confirm customers understand the information you have given them and how to interpret (verbal and non-verbal) signals from them									
d where to get help from to deal with communication difficulties									
e your organisation's standards and codes for behaviour and customer service including rules on customer confidentiality									
f standards of behaviour expected from you.									

*continued overleaf...*

**Feedback/comments:**

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**Date:**

**Assessor's signature:**

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**Internal verifier's signature:**

**Date:**

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# Option units



## Unit summary sheet

# Unit 8: Support Learners by Coaching in the Workplace

### What is the unit about?

This unit is for staff skilled in their particular discipline and who wish to develop and assist new and existing staff in developing and acquiring new work based skills. It is about making sure the nature of coaching in the workplace is properly understood and that an appropriate environment is created in which this function can take place. It covers the skills and competences required to give learners information and guidance on their work roles. In particular it covers the provision of job-related coaching. Applying relevant safe working practices will be a key issue throughout.

This unit consists of one element:

Element 8.1 – Plan, Provide and Maintain the Coaching Process.

This element is about planning and providing coaching.

You should be able to provide coaching activity to a range of individuals to include as appropriate:

- new starters
- individuals unfamiliar with a particular technical matter
- individuals undertaking training to increase workplace skills
- individuals experiencing difficulty in specific technical aspects of their work.

You should be able to communicate in the following ways:

- face-to-face verbal communication
- small group discussion
- presentation on technical issues to small groups
- written communication
- IT based coaching programmes.

### Who is this unit for?

The unit is specifically for those responsible for coaching.

### Links to other units

This unit is based on unit 36 from the *GoSkills* Transport Engineering and Maintenance suite.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 8 Support Learners by Coaching in the Workplace				
<b>Element:</b> 8.1 Plan, Provide and Maintain the Coaching Process				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	understand the role of a coach			
2	list the personal attributes of an effective coach			
3	list the benefits that can derive from coaching			
4	identify learners' needs and the resources and facilities required to undertake the coaching role to help learners meet the needs of their learning needs			
5	identify sources of information and support to help perform the role of coach			
6	agree how progress and any problems will be reviewed during the coaching process			
7	plan and maintain the coaching process within the limits of your responsibility.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

NVQ title and level: Edexcel Level 2 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p><b>Unit title:</b> Unit 8 Support Learners by Coaching in the Workplace</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the relevant health and safety legislation, regulations and safe working procedures relevant to the workplace									
b the coaching process, in particular how to: <ul style="list-style-type: none"> <li>provide appropriate coaching activities for particular situations</li> <li>provide opportunities in the workplace for learners to develop skills and increase confidence</li> <li>plan and monitor coaching activity</li> <li>support structures available to learners</li> </ul>									
c the techniques of coaching, in particular how to: <ul style="list-style-type: none"> <li>set goals and targets</li> <li>analyse tasks</li> <li>develop a plan</li> <li>instruct by sharing knowledge and skills</li> <li>obtain and give feedback</li> <li>analyse learners' strengths and weaknesses and help them to correct defects</li> </ul>									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
d the personal attributes of effective coaches									
e the factors that inhibit learning									
f the problems experienced by all new entrants including, where relevant, those from overseas needing for example language skills, as well as experienced staff requiring further development in workplace skills									
g the extent of your own responsibility and to whom you should report if you have problems that you cannot solve.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 9: Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations

### What is the unit about?

This unit is about how you assess what levels of competency you need in your role and decide whether you need further training or development to meet or maintain those standards.

This unit consists of one element:

Element 9.1 – Develop and Maintain Your Work Skills and Knowledge.

This element is about how you assess what standards of competency you need in your role and decide whether you need further training or development to meet or maintain those standards, for example knowledge of the PCV Driver CPC if this is applicable to your organisation and job role. You may also have to consider a role you could have in the near future. In identifying your development needs, you will have to balance your needs with those of your organisation.

### Who is this unit for?

This unit is for all those people working in Road Passenger Transport Operations.

### Glossary

#### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements

### Links to other units

This unit is based on unit 14 from the *GoSkills* Road Passenger Vehicle Driving suite.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 9 Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations				
<b>Element:</b> 9.1 Develop and Maintain Your Work Skills and Knowledge				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify and describe your needs to develop the skills required in your role			
2	balance your needs and the needs of your organisation			
3	discuss and agree where relevant with the appropriate person in your organisation how you will receive the development you need and get feedback			
4	carry out activities to develop your skills			
5	take action if your progress is below the necessary standard			
6	identify the main providers of passenger transport related to your role.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<p><b>Unit title:</b> Unit 9 Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:										
a	the standards of skills and knowledge needed in your role									
b	how to measure your current skills and identify areas needing development									
c	any process within your organisation for discussing and agreeing your development plans and getting feedback									
d	how to monitor your progress against your development plans									
e	the passenger transport industry at local and national level, relevant to your role.									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 10: Manage Conflict in Road Passenger Transport Operations

### What is the unit about?

This unit is about dealing with situations where there is conflict between people. You should be able to recognise when a person's behaviour is inappropriate and deal with this in line with relevant legal procedures and organisational guidelines. You should be able to maintain your own personal safety, giving advice and warnings, and calling for assistance when required. Communication is a key feature of this unit and you should be able to communicate with people effectively both verbally and non-verbally to defuse a situation.

This unit consists of two elements:

Element 10.1 – Assess Situations and Decide on Action Needed

Element 10.2 – Take Action to Deal with Conflict.

### *Element 10.1*

This element is about how you recognise and assess situations that involve inappropriate behaviour that could lead to potential or actual conflict situations. This behaviour could include:

- verbal or physical abuse
- actions that could cause a danger to others
- actions that could cause damage to property
- not keeping to conditions of service
- illegal or offensive acts.

You should be able to prioritise the action you plan to take in line with approved organisational, relevant legal or local procedures or guidelines. This action must always be within your ability and authority. In situations outside your ability or authority, you should know where and how to get help or advice. While deciding what action to take, you should maintain the goodwill of those not directly involved and take account of their needs when dealing with the situation.

### *Element 10.2*

This element is about how you deal effectively with potential or actual conflict situations. Your action should be in line with approved organisational, relevant legal or local procedures or guidelines, and be within your ability and authority. You should try to control the situation, either personally or by contacting someone else, without making the situation worse. As a result, you should know from where and how to get help, including from colleagues, the emergency services or authorities, and other operators. This is particularly important in situations outside your ability or authority to deal with. You should maintain your safety and that of others while dealing with the conflict. You will also need to balance the needs of others not directly involved. You should be able to report details of any conflict situations and details of any action you have taken.

*continued overleaf...*

**Who is this unit for?**

This unit is for those working in Road Passenger Transport Operations.

**Glossary***People*

Colleagues, passengers and members of the general public.

*Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

**Links to other units**

This unit is based on unit 4 from the *GoSkills* Road Passenger Vehicle Driving suite and also unit 7 from the *GoSkills* Passenger Carrying Vehicle Driving suite.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 10 Manage Conflict in Road Passenger Transport Operations				
<b>Element:</b> 10.1 Assess Situations and Decide on Action Needed				
<b>Performance criteria:</b> You must be able to:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	promptly recognise situations that involve inappropriate behaviour by people			
2	assess the risks to yourself and others in the situation			
3	assess the seriousness of the situation and the behaviour of the people involved			
4	prioritise the action to be taken, in line with approved organisational guidelines			
5	make sure the action you plan to take, wherever possible, meets approved organisational guidelines or procedures			
6	consider the needs of others when dealing with the situation as far as possible and in line with approved organisational guidelines			
7	get help from the appropriate sources in situations outside your own authority or ability to deal with			
8	collect and report necessary information about the people involved and the situation			
9	assist other staff as appropriate to deal with conflict situations.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 10 Manage Conflict in Road Passenger Transport Operations				
<b>Element:</b> 10.2 Take Action to Deal with Conflict				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	take action to deal with conflict situations in line with your organisation's procedures and guidelines			
2	take action in a way that does not make the situation worse			
3	take control of the situation in a way that reduces, as far as possible, any possible conflict			
4	get help from the appropriate sources in situations that are outside your own authority or ability			
5	consider the needs of others, as far as possible, when taking action			
6	maintain your safety and security, and that of others in the workplace, while taking action			
7	report the details of any conflict situation in line with your organisation's procedures.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 10 Manage Conflict in Road Passenger Transport Operations									
<b>Element:</b> 10.1 Assess Situations and Decide on Action Needed									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the types of conflict situations that are likely to arise									
b how to carry out risk assessments in conflict situations and the factors you should bear in mind									
c the actions you can take and are authorised to take									
d when and how to get help when needed									
e why you should collect and report information about the people involved and the situation and your organisation's procedures regarding this									
f how to maintain goodwill in conflict situations									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 10 Manage Conflict in Road Passenger Transport Operations									
<b>Element:</b> 10.2 Take Action to Deal with Conflict									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the action you can take and are authorised to take with regard to resolving conflict between people									
b the organisational and relevant legal responsibilities you have when sorting out conflict situations									
c how to carry out positive responsive action to deal with conflict situations									
d how and at what point you should get help when necessary									
e how to maintain your own safety and security, and that of others and your organisation's property									
f your organisation's procedures and guidelines for dealing with and reporting conflict situations.									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 11: Working with Computers (AOSG Unit 21)

### What is the unit about?

This unit is about your ability to use a computer system safely and effectively.

The unit consists of two elements:

Element 11.1 – Use Computer Systems and Software

Element 11.2 – Maintain the Security of Data.

#### *Element 11.1*

This element is about using the computer systems and software in your organisation. You will need to demonstrate that you are fully aware of your responsibilities when using a computer system and the software packages you will need. Performance in this element relates to visual safety checks (hardware components, plugs, cables, interfaces), computer systems (stand alone PC, networked system), passwords (system, software) and difficulties (hardware failure, software failure, corruption of data).

#### *Element 11.2*

This element is about maintaining the security of data on computer systems. You will be required to show an understanding of the need to keep data confidential and secure. Performance in this element relates to the appropriate times for security checks (on a regular basis, if disclosure is suspected), potential risks (corruption, loss, illegal copying), sources of potential security risks ( internal, external, poor storage facilities, theft), security measures (back up copies, secure storage), confidentiality (passwords) and legal regulations (data protection legislation, VDU regulations, health and safety, document retention).

### Who is this unit for?

This unit is for all those in road passenger transport operations who use computers at work.

### Glossary

#### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

### Links to other units

This is a reformatted unit of the same title owned by the Accountancy Occupational Standards Group where it appears as unit 21 in the Payroll Administration suite.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit:</b> Unit 11 Working with Computers				
<b>Element:</b> 11.1 Use Computer Systems and Software				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	perform initial visual safety checks and power up the computer system			
2	use passwords to gain access to the computer system where limitations on access to data is required			
3	access, save and print data files and exit from relevant software			
4	appropriate file names and save work			
5	back up work carried out on a computer system to suitable storage media at regular intervals			
6	close down the computer without damaging the computer system			
7	seek immediate assistance when difficulties occur.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 11 Working with Computers				
<b>Element:</b> 11.2 Maintain the Security of Data				
<b>Performance criteria:</b> You must be able to:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
a	ensure passwords are kept secret and changed at appropriate times			
b	ensure computer hardware and program disks are kept securely located			
c	identify potential risks to data from different sources and take steps to resolve or minimise them			
d	maintain security and confidentiality of data at all times			
e	understand and implement relevant legal regulations.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<b>Unit title:</b> Unit 11 Working with Computers (AOSG Unit 21)										
<b>Element:</b> 11.1 Use Computer Systems and Software										
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit:</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:										
a	the importance of carrying out simple visual safety checks on hardware and correct powering up and shutting down procedures									
b	how to save, transfer and print documents									
c	how to take back up copies									
d	the causes of difficulties, necessary files which have been damaged or deleted, printer problems, hardware problems									
e	the location of hardware, software and back up copies									
f	location of information sources									
g	the organisation's procedures for changing passwords, and making back ups									
h	house style for presentation of documents									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<b>Unit title:</b> Unit 11 Working with Computers (AOSG Unit 21)										
<b>Element:</b> 11.2 Maintain the Security of Data										
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit:</b>				<b>Type of evidence</b>						
				EI	O	P	WT	S	APEL	Q&A Date
You must know and understand:										
a the purpose of passwords										
b the different types of risk, viruses, confidentiality										
c the relevant security and legal regulations, data protection legislation, copyright, VDU legislation, health and safety regulations, retention of documents										
d the location of hardware, software and back up copies										
e the organisational security policies.										

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 14: Process Customer Service Complaints (ICS Unit 34)

### What is the unit about?

In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered.

This unit is all about the process of handling complaints.

This unit consists of two elements:

Element 14.1 – Recognise the Signs that a Query or Problem is About to Produce a Complaint

Element 14.2 – Deal with a Complaint Effectively.

The key words and phrases for this unit are:

- recognise a complaint
- dissatisfied customers
- choose between options
- assess risks
- report findings
- escalate complaints
- give feedback
- keep records.

### Who is this unit for?

This unit is for all those whose work brings them into contact with customers.

### Links to other units

This unit is owned by the **Institute of Customer Service** where it sits within the Customer Service Theme of Handling Problems where it appears as unit 34. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

*continued overleaf...*

## Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit. 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must prove that you have processed complaints that are seen by your organisation as:
  - a justified
  - b unjustified.
- 5 You must provide evidence of processing customer service complaints:
  - a during routine delivery of customer service
  - b during a busy period for your organisation
  - c during a quiet period for your organisation
  - d when people, systems or resources have let you down.
- 6 You need to prove that you have dealt with customers who:
  - a have different needs and expectations
  - b appear angry or confused
  - c behave unconventionally.
- 7 You must provide evidence that you have processed complaints and taken full account of:
  - a organisational procedures
  - b sector or industry codes of practice
  - c legislation.
- 8 Your evidence must include examples of complaints you have processed:
  - a using your own authority
  - b by referring them upwards in the organisation.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 14 Process Customer Service Complaints				
<b>Element:</b> 14.1 Recognise the Signs that a Query or Problem is About to Produce a Complaint				
<b>Performance criteria:</b> When you process customer service complaints you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	identify signs that a customer is becoming dissatisfied with the customer service of your organisation			
2	take action to change the situation so that the query or problem does not result in a complaint			
3	take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 14 Process Customer Service Complaints				
<b>Element:</b> 14.2 Deal with a Complaint Effectively				
<b>Performance criteria:</b> When you process customer service complaints you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	ensure that you have a clear understanding of the nature and details of the complaint			
2	investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint			
3	identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation			
4	assess the risks to your organisation of choosing each option			
5	report the findings of your investigation to your customer and offer your chosen solution			
6	escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so			
7	give feedback to other colleagues involved which will help them avoid future complaints			
8	keep clear records of the way the complaint has been handled to avoid later misunderstandings.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 14 Process Customer Service Complaints</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit You must know and understand :	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery									
b why dealing with complaints is an inevitable part of delivering customer service									
c organisational procedures for dealing with complaints									
d how to negotiate a solution with your customer that is acceptable to that customer and to the organisation									
e the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported									
f when to escalate a complaint by involving more senior members of the organisation or an independent third party									
g the implications of admitting liability for an error made by your organisation									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand :	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h how to spot and interpret signals that your customer may be considering making a complaint									
l techniques for handling conflict									
j the importance of dealing with a complaint promptly									
k why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint									
l how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
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## Unit summary sheet

# Unit 15: Deal with Customers in Writing or Using ICT (ICS Unit 15)

### What is the unit about?

Some customer service delivery involves communicating with your customer in a way that creates a permanent record either in writing or by using ICT. This form of communication carries risks and implications that are less likely to apply to a conversation held with your customer face to face or on the telephone.

This unit is all about how written or ICT communication can be made effective and can contribute to excellent customer service.

This unit consists of three elements:

Element 15.1 – Use Written or ICT Communication Effectively

Element 15.2 – Plan and Send an Effective Written or ICT Communication

Element 15.3 – Handle Incoming Written or ICT Communications Effectively.

The key words and phrases for this unit are:

- operating equipment
- managing time
- using clear and concise language
- recognising style and tone of language
- anticipate expectations
- establishing a rapport
- summarising key points
- identifying and choosing between options
- summarising outcomes.

### Who is this unit for?

This unit is for all those whose work brings them into contact with customers.

### Links to other units

This unit is owned by the **Institute of Customer Service** where it sits within the Customer Service Theme of Impression and Image where it appears as unit 15. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

*continued overleaf...*

## Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for the assessment of simulated activities and a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQs Levels 2, 3 and 4 NVQs – January 2006.*)
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be in writing, by text message, email, internet, intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.
- 5 Your evidence must include examples of dealing with customers who:
  - a have routine expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 6 The style and tone of your communication must follow organisational guidelines and you must prove that you have taken account of:
  - a your job role and position in your organisation
  - b the personal style and preferences of your customer
  - c the conventions of the medium of communication you are using.
- 7 Your evidence must include examples of:
  - a individual communications with customers
  - b group or circular communications with customers
  - c group or circular communications that have been tailored to individuals or different categories of customer.
- 8 You must show that you have communicated with customers when:
  - a you have initiated the contact
  - b you are responding to a customer.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 15 Deal with Customers in Writing or Using ICT				
<b>Element:</b> 15.1 Use Written or ICT Communication Effectively				
<b>Performance criteria:</b> When you are dealing with customers in writing or using ICT you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	operate equipment used to communicate in writing or using ICT efficiently and effectively			
2	ensure that the period of time between exchanges in writing or using ICT represents excellent customer service			
3	use language that is clear and concise			
4	adapt your use of language to meet the individual needs of your customer			
5	ensure that the style and tone of your written or ICT communication follows your organisation's guidelines and matches the service offer .			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 15 Deal with Customers in Writing or Using ICT				
<b>Element:</b> 15.2 Plan and Send an Effective Written or ICT Communication				
<b>Performance criteria:</b> When you are dealing with customers in writing or using ICT you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	anticipate your customer's expectations taking account of any previous exchanges you may have had			
2	assemble all the information you need to construct the communication			
3	plan the objective of your communication			
4	format your communication following your organisation's guidelines			
5	open the communication positively to establish a rapport with your customer			
6	ensure that your customer is aware of the purpose of the communication as early as possible			
7	summarise the key point of the communication and any actions that you or your customer will take as a result.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 15 Deal with Customers in Writing or Using ICT				
<b>Element:</b> 15.3 Handle Incoming Written or ICT Communications Effectively				
<b>Performance criteria:</b> When you are dealing with customers in writing or using ICT you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	read your customer's communication carefully to identify their precise reason for contacting you			
2	identify what they are seeking as the outcome of the contact			
3	identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each			
4	choose the option that is most likely to lead to customer satisfaction within the service offer			
5	summarise the outcome of the communication and any actions that you or your customer will take as a result.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<p><b>Unit title:</b> Unit 15 Deal with Customers in Writing or Using ICT</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You need to know and understand:										
a	the importance of using clear and concise language									
b	the additional significance and potential risks involved in committing a communication to a permanent record format									
c	the effects of style and tone on the reader of a written or ICT communication									
d	the importance of adapting your language to meet the needs of customers who may find the communication hard to understand									
e	your organisation's guidelines and procedures relating to written communication and the use of ICT to communicate									
f	how to operate equipment used for producing and sending written or ICT communications									
g	the importance of keeping your customer informed if there is likely to be any delay in responding to a communication									
h	the risks associated with the confidentiality of written or ICT communications.									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 16: Deal with Customers by Telephone

### What is the unit about?

This unit is about the skills and competences you need when dealing with your customer by telephone. Customer satisfaction in this situation depends on good feelings about the way the transaction has been handled as well as the features and benefits of the services or products that are offered to the customer.

Whilst verbal communication is important, your focus on your customer and the rapport that is formed also depends on your skills with the telephone system and any information you are accessing whilst on the telephone to your customer.

This unit consists of three elements:

Element 16.1 – Use the Telephone System Effectively

Element 16.2 – Plan and Make Focused Telephone Calls to Your Customer

Element 16.3 – Handle Incoming Calls Effectively.

The key words and phrases for this unit are:

- operate telephone system
- speaking
- listening
- planning
- selecting information
- recording information
- selecting amongst options
- identifying benefits and drawbacks
- taking messages.

### Who is this unit for?

This unit is for all those whose work brings them into contact with customers.

### Links to other units

This unit is owned by the **Institute of Customer Service** where it sits within the Customer Service Theme of Impression and Image where it appears as unit 17. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

## Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for the assessment of simulated activities and a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQs Levels 2, 3 and 4 – January 2006.*)
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must include examples of dealing with customers who:
  - a have routine expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 5 Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
- 6 You must provide evidence of dealing with customers by telephone:
  - a during routine delivery of customer service
  - b during a busy period for your organisation
  - c during a quiet period for your organisation
  - d when people, systems or resources have let you down.
- 7 You must provide evidence that you have taken messages that are passed on to colleagues:
  - a verbally
  - b in a form that maintains a permanent record.
- 8 You may provide evidence of dealing with customers using conventional landline telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at distance.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 16 Deal with Customers by Telephone				
<b>Element:</b> 16.1 Use the Telephone System Effectively				
<b>Performance criteria:</b> When you are dealing with customers by telephone you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	operate the telephone equipment efficiently and effectively			
2	keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time			
3	speak clearly and slowly to allow for the possibility that reception on the telephone line may not be perfect			
4	adapt your speech to meet the individual needs of your customer			
5	control the length of the conversation if the call is costing your customer money			
6	ensure that promises to call back are kept.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 16 Deal with Customers by Telephone				
<b>Element:</b> 16.1 Plan and Make Focussed Telephone Calls to Your Customer				
<b>Performance criteria:</b> When you are dealing with customers by telephone you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer			
2	plan the opening part of your conversation with your customer and anticipate their possible responses			
3	plan the objective of your call and the way in which you expect the call to end			
4	open the conversation positively and establish a rapport with your customer			
5	ensure that your customer is aware of the purpose of your call as early as possible			
6	respond positively to queries and objections from your customer			
7	summarise the outcome of the call and any actions that you or your customer will take as a result			
8	listen carefully when collecting information from your customer so that you do not make mistakes or have to keep repeating the question.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 16 Deal with Customers by Telephone				
<b>Element:</b> 16.3 Handle Incoming Calls Effectively				
<b>Performance criteria:</b> When you are dealing with customers by telephone you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	greet your customer following your organisation's guidelines			
2	listen closely to your customer to identify their precise reason for calling and what they are seeking as the outcome of the call			
3	identify all the options you have for responding to your customer, weigh up the benefits and drawbacks of each			
4	choose the option that is most likely to lead to customer satisfaction within the service offer			
5	summarise the outcome of the call and any actions that you or your customer will take as a result			
6	select the appropriate information you need to record and store following your organisation's guidelines			
7	take a clear message for a colleague if you are unable to deal with some aspect of your customer's expectations			
8	put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<p><b>Unit title:</b> Unit 16 Deal with Customers by Telephone</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit</b>		<b>Type of evidence</b>								
		<b>EI</b>	<b>O</b>	<b>P</b>	<b>WT</b>	<b>S</b>	<b>APEL</b>	<b>Q&amp;A Date</b>	<b>EWE</b>	<b>PD</b>
You must know and understand:										
a	the importance of speaking clearly and slowly when dealing with customers by telephone									
b	the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone									
c	the importance of adapting your speech to meet the needs of customers who may find your language or accent hard to understand									
d	your organisation's guidelines and procedures for the use of telephone equipment									
e	your organisation's guidelines and procedures for what should be said during telephone conversations with customers									
f	what details should be included if taking a message for a colleague									
g	how to operate the organisation's telephone equipment									
h	the importance of keeping your customer informed if they are on hold during a call									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
i the importance of not talking over an open telephone									
j your organisation's guidelines for handling abusive calls.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Unit summary sheet

# Unit 17: Deal with Customers Face-to-face (ICS Unit 16)

### What is the unit about?

This unit is all about the skills you need to deal with your customer in person and face-to-face. When you are working with a customer in this way, good feelings about the way you look and behave can improve how your customer feels about the transaction and give them greater satisfaction.

Whilst verbal communication is important, your focus on your customer and the relationship that is formed also depends on the non-verbal communication that takes place between you. You have many opportunities to impress your customer and your behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

This unit consists of two elements:

Element 17.1 – Communicate Effectively with Your Customer

Element 17.2 – Improve the Rapport with Your Customer Through Body Language.

### The key words and phrases for this unit are:

- communicating
- working face-to-face
- understanding behaviour
- giving a professional image
- balancing demands
- understanding body language
- building a rapport
- keeping focused.

### Who is this unit for?

This unit is for all those whose work brings them into contact with customers

### Links to other units

This unit is owned by the **Institute of Customer Service** where it sits within the Customer Service Theme of Impression and Image suite where it appears as unit 16. This Theme covers the Customer Service behaviours and processes that have the most impact on the way your customer sees you and your organisation.

*continued overleaf...*

## Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your evidence must include examples of dealing with customers who:
  - a have routine expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 5 Your evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
- 6 You must provide evidence of dealing with customers face to face:
  - a during routine delivery of customer service
  - b during a busy period for your organisation
  - c during a quiet period for your organisation
  - d when people, systems or resources have let you down.
- 7 You must include examples of how you have made use of:
  - a verbal communication skills
  - b non-verbal communication skills.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 17 Deal with Customers Face-to-face				
<b>Element:</b> 17.1 Communicate Effectively with Your Customer				
<b>Performance criteria:</b> When you are dealing with customers face-to-face you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	plan a conversation with your customer that has structure and clear direction			
2	hold a conversation with your customer that establishes rapport			
3	focus on your customer and listen carefully to ensure that you collect all possible information you need from the conversation			
4	explain your services or products and your organisation's service offer to your customer clearly and concisely			
5	adapt your communication to meet the individual needs of your customer			
6	anticipate your customer's requests and needs for information			
7	balance conflicting demands for your attention whilst maintaining rapport with your current customer			
8	calm down situations when one customer is adversely affecting the customer service enjoyed by other customers.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 17 Deal with Customers Face-to-face				
<b>Element:</b> 17.2 Improve the Rapport with Your Customer Through Body Language				
<b>Performance criteria:</b> When you are dealing with customers face-to-face you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	present a professional and respectful image when dealing with your customer			
2	show an awareness of your customer's needs for personal space			
3	focus your attention on your customer so that non-verbal cues do not betray disinterest, boredom or irritation			
4	ensure that your customer focus is not disrupted by colleagues			
5	observe all customers and the total customer service situation whilst maintaining rapport with your current customer			
6	observe your customer to read non-verbal clues about their wishes and expectations.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<p><b>Unit title:</b> Unit 17 Deal with Customers Face-to-face</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:										
a	the importance of speaking clearly and slowly when dealing with a customer face-to-face									
b	the importance of taking the time to listen carefully to what the customer is saying									
c	your organisation's procedures that impact on the way you are able to deal with your customers face-to-face									
d	the features and benefits of your organisation's services or products									
e	your organisation's service offer and how it affects the way you deal with customers face-to-face									
f	the principles of body language that enable you to interpret customer feelings without verbal communication									
g	how individual transactions between people can be understood by using a behavioural model such as transactional analysis									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction									
l the agreed and recognised sector cues in customer behaviour that indicate that your customer expects a particular action by you									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 18: Support Customer Service Improvements (ICS Unit 37)

### What is the unit about?

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers.

Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

This unit is all about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation that can authorise trying out the change.

This unit consists of three elements:

Element 18.1 – Use Feedback to Identify Potential Customer Service Improvements

Element 18.2 – Implement Changes in Customer Service

Element 18.3 – Assist with the Evaluation of Changes in Customer Service

The key words and phrases for this unit are:

- communicate changes positively
- customer service improvements
- customer feedback
- collect information
- use feedback
- present possibilities for change
- improve service
- share ideas
- implement changes

### Who is this unit for?

This unit is for all those whose work brings them into contact with customers.

### Links to other units

This unit is owned by the **Institute of Customer Service** where it sits within the Customer Service Theme of Development and Improvement suite where it appears as unit 37. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

*continued overleaf...*

### Evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit. (*Guidelines for the assessment of simulated activities and a Realistic Working Environment can be found in the Customer Service Assessment Strategy for S/NVQs Levels 2, 3 and 4 NVQs – January 2006.*)
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You must prove that you have:
  - a contributed to improving customer service through your own efforts
  - b contributed to improving customer service by working with others.
- 5 Your evidence must cover at least two changes with which you have been actively involved. In each case you must be able to identify the part you played in:
  - a linking customer feedback with the reasons for the change
  - b implementing the change
  - c gathering customer reactions to the change.
- 6 Your evidence for each change must show how:
  - a the change has improved customer service
  - b your customers have reacted to the change.
- 7 Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 18 Support Customer Service Improvements				
<b>Element:</b> 18.1 Use Feedback to Identify Potential Customer Service Improvements				
<b>Performance criteria:</b> To support customer service improvements you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	gather informal feedback from your customers			
2	use customer feedback procedures to collect information from your customers			
3	use the information from our customers to develop a better understanding of their customer service experience			
4	identify ways the service you give could be improved based on information you have gathered			
5	share your ideas for improving customer service with colleagues.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 18 Support Customer Service Improvements				
<b>Element:</b> 18.2 Implement Changes in Customer Service				
<b>Performance criteria:</b> To support customer service improvements you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	identify a possible change that could be made to improve customer service			
2	present your idea for improving customer service to a colleague with the appropriate authority to approve the change			
3	carry out changes to customer service procedures based on your own idea or proposed by your organisation			
4	keep your customers informed of changes to customer service			
5	give customers a positive impression of changes that have been made.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 18 Support Customer Service Improvements				
<b>Element:</b> 18.3 Assist with the Evaluation of Changes in Customer Service				
<b>Performance criteria:</b> To support customer service improvements you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	discuss with others how changes to customer service are working			
2	work with others to identify any negative effects of changes and how these can be avoided.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations														
<b>Candidate:</b>					<b>Assessor:</b>									
<p><b>Unit title:</b> Unit 18 Support Customer Service Improvements</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>														
<b>Knowledge and understanding for this unit</b> You must know and understand:					<b>Type of evidence</b>									
					EI	O	P	WT	S	APEL	Q&A Date	EWE	PD	
a how customer experience is influenced by the way service is delivered														
b how customer feedback is obtained														
c how to work with others to identify and support change in the way service is delivered														
d why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them.														

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 19: Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations

### What is the unit about?

This unit is about the preparation of vehicle and driver rotas from a timetable. You will be able to develop and maintain cost-effective vehicle rotas for a number of vehicles and drivers operating a timetabled service. You will need to know the vehicle and driver resource available and understand the principles of developing rotas in line with your organisation and the local arrangements.

This unit consists of three elements

Element 19.1 – Prepare a Vehicle Rota

Element 19.2 – Prepare a Drivers Rota

Element 19.3 – Monitor Vehicle and Driver Rotas.

#### *Element 19.1*

This unit is about the preparation of vehicle rotas from an existing timetable. You will be able to develop and maintain cost-effective vehicle rotas for a number of vehicles operating a timetabled service. This may be for an ongoing service or for a set contracted period. You will need to know the vehicle availability and understand the principles of preparing vehicle rotas to support the timetable. The rotas must be both workable and cost effective.

#### *Element 19.2*

This element is about the preparation of driver rotas that ensure vehicles are fully crewed to meet their timetabled commitments. You will be able to develop and maintain cost effective driver rotas that take account of legislative requirements on drivers' hours and appropriate national and local agreements. You will need to know the driver resource available and as appropriate agree rotas with local trade union officials and operating staff to help ensure the smooth running of the timetable

#### *Element 19.3*

This element is about providing support to operational staff who implement the vehicle and driver rotas. You will be expected to monitor and help make changes to the original rotas to accommodate any problems and unplanned circumstances both internal and external to the organisation e.g. vehicles taken out of service, road closures, driver illness etc.

### Who is this unit for?

This unit is for those who are responsible, either in a full time capacity or as part of other duties, for making sure that workable and cost effective vehicle and driver rotas for timetabled passenger services are accessible and maintained.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations				
<b>Element:</b> 19.1 Prepare a Vehicle Rota				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	understand the implications of a passenger service timetable on vehicle rotas, for example, type of vehicle required for a particular route			
2	ensure rules for vehicle rotas are clear and agreed within the organisation			
3	obtain information on vehicle availability during the period covered by the vehicle rota			
4	identify internal and external factors, for example, scheduled road closures that could impact on the vehicle rota			
5	prepare an initial vehicle rota			
6	amend the rota to meet daily timetable changes, for example, Sunday and Bank Holiday working, school holidays etc			
7	review each bus duty against the Peak Vehicle Requirement (PVR) to improve vehicle utilisation			
8	finalise an accurate, workable and cost effective vehicle rota			
9	finalise an accurate, workable and cost effective vehicle rota.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
Unit title: Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations				
<b>Element:</b> 19.2 Prepare a Drivers Rota				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	develop driver rotas to ensure vehicles are fully crewed			
2	ensure driver rotas comply with legislation on drivers' hours and with organisational, national and local agreements			
3	obtain all information on driver availability during the period covered by the driver rotas			
4	review daily workload for individual drivers for efficiency and cost effectiveness in accordance with company practice			
5	agree the driver rotas with appropriate trade union officials and operating staff.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations				
<b>Element:</b> 19.3 Monitor Vehicle and Driver Rotas				
<b>Performance criteria:</b> You must be able to:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	monitor vehicle and driver rotas			
2	provide support and assistance to work colleagues involved in implementing the rotas			
3	identify problems and make appropriate adjustments			
4	identify any additional resources or changes required for the delivery of the vehicle and driver rotas			
5	involve all relevant individuals including, as appropriate, trade union officials in any changes to the vehicle and driver rotas			
6	comply with any organisational and legal requirements for reports on monitoring activity.			

<b>Feedback/comments:</b>
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<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations									
<b>Element title:</b> 19.1 Prepare a Vehicle Rota									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the rules and regulations your organisation must follow regarding vehicle utilisation									
b what vehicles are available to operate the timetable									
c the geographical area covered by the timetable as it affects vehicle operations eg low bridges									
d how to prepare vehicle rotas to achieve maximum vehicle utilisation without detriment to the timetable									
e how to utilise any IT packages used by your organisation									
f how to work with others to achieve the vehicle rota									
g the consequences to the vehicle rota of changes to a daily timetable eg Sunday and Bank Holiday timetables, changes arising from school holiday periods									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations									
<b>Element title:</b> 19.2 Prepare a Drivers Rota									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the statutory requirements and organisational agreements relating to drivers' hours									
b the drivers available to implement the timetable during the period covered by the driver rota including those available for each type of duty; middle, late etc									
c costs associated with driver utilisation									
d route information as it affects driver rotas, for example, availability of canteen facilities during driver break periods									
e how to prepare driver rotas to maximise cost efficiency yet be realistic within the organisation's custom and practice and without detriment to the timetable									
f how to negotiate driver rotas with operating staff and with trade union officials as appropriate									
g how to utilise any IT packages used by your organisation									

*continued overleaf...*

**Feedback/comments:**

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**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 19 Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations									
<b>Element title:</b> 19.3 Monitor Vehicle and Driver Rotas									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b> You must know and understand:	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a how to monitor rotas effectively									
b understands the needs and support requirements of those implementing the rotas									
c how to prioritise and resolve problems effectively and efficiently									
d how to assess the resource needs to support any changes to the rotas									
e how to negotiate with trade union officials and operating staff as appropriate on any changes to the rotas									
f the requirement for adequate driver and vehicle records to meet organisational and legal needs .									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 20: Implement Schedules in Road Passenger Transport Operations

### What is the unit about?

This unit is about implementing vehicle and driver schedules in road passenger transport. You will need to know and understand the principles of developing these schedules in line with your organisation's procedures. You will also appreciate the importance of vehicle and driver resource availability and be able to operate control systems to deliver the vehicle and driver schedules.

This unit consists of one element:

Element 20.1 – Implement the Scheduling of Road Passenger Transport.

This element is about how you implement effectively the scheduling of vehicles and drivers to provide a service to customers in line with business objectives for the organisation. You will need to take into account your organisation's agreements with its drivers or those contracted to them.

### Who is this unit for?

This unit is for dispatchers and schedulers working in taxi, private hire vehicle, community transport and chauffeuring.

### Glossary

#### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 20 Implement Schedules in Road Passenger Transport Operations				
<b>Element:</b> Unit 20.1 Implement the Scheduling of Road Passenger Transport				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	implement and monitor vehicle and driver schedules to meet customer requirements			
2	provide support and assistance to work colleagues involved in scheduling			
3	use and monitor operational control systems to deliver the vehicle and driver schedules			
4	identify and obtain additional resources for the delivery of the vehicle and driver schedules			
5	identify vehicle type and appropriate driver skills to meet passengers with special needs			
6	involve all relevant work colleagues in the effective delivery of the vehicle and driver schedules			
7	identify problems and make appropriate adjustments			
8	handle operational emergencies and issues in a professional manner.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 20 Implement Schedules in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a how to implement and monitor vehicle and driver schedules effectively									
b the needs and support requirements of those implementing the schedules									
c how to use operational control systems to deliver the vehicle and driver schedules									
d the application and implementation of passenger sharing where it is appropriate									
e how to assess and obtain the resource needs to deliver the vehicle and driver schedules									
f how to encourage and motivate the support of others									
g how to prioritise and resolve problems effectively and efficiently									
h the need to maintain professionalism in all circumstances.									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 21: Take Telephone Bookings in Road Passenger Transport Operations

### What is the unit about?

This unit is about taking telephone calls asking for transport. You should be able to find out what the prospective passenger needs. Prospective passengers may include those who have physical disabilities, speech, hearing, learning and behavioural difficulties and who could be confused easily. You are expected to make sure that you can meet their needs for transport or offer an alternative arrangement making sure that this is fully understood. You should know and understand the range of services offered by your organisation and contact points in other organisations from which support may be required, for example, the Ambulance Service.

You should be able to record, and within the limits of your authority, progress and monitor agreed bookings. You should also be able to call prospective passengers when your organisation is not able for any reason to meet pre-booked arrangements and agree with them alternatives.

This unit consists of two elements:

Element 21.1 – Identify the Prospective Passenger’s Transport Requirements

Element 21.2 – Communicate Changes to Transport Arrangements.

#### *Element 21.1*

This element is about identifying the prospective passenger’s transport needs and agreeing the final booking having made sure that your organisation can meet the booking and that the prospective passenger fully understands the arrangements made. Prospective passengers may include those who have physical disabilities, speech, hearing, learning difficulties and behavioural difficulties and who could be confused easily. You will need a good knowledge of the services your organisation offers and of the main contact points in other support organisations. You should be aware of those sections of the Disability Discrimination Act (DDA) that effect your work and deal with DDA related requests e.g. request for large print timetables etc. You should offer help before you are asked, where possible, within the limits of your ability and responsibility, and communicate in a polite and considerate way. At all times you should treat prospective passengers in a friendly and helpful way that provides good customer service and promotes confidence in the organisation.

#### *Element 21.2*

This element is about recording transport needs agreed in telephone conversations and calling prospective passengers where operational difficulties prevent agreed transport arrangements being implemented. Prospective passengers may include those who have speech, hearing, learning or behavioural difficulties and who could be confused easily.

*continued overleaf...*

**Who is this unit for?**

This unit is for telephone booking staff working in road passenger transport operations.

**Glossary***Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

*Prospective passenger*

This term is used in this unit to denote either a single individual or a group.

**Links to other units**

This unit is based on unit 20 from the *GoSkills* Road Passenger Vehicle Driving suite.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 21 Take Telephone Bookings in Road Passenger Transport Operations				
<b>Element:</b> 21.1 Identify the Prospective Passenger's Transport Requirements				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	use the telephone and any associated IT equipment			
2	accurately identify in a friendly and helpful way the prospective passenger's transport needs including any special needs that would need to be accommodated, for example large print timetables or wheelchair			
3	check whether you can meet the prospective passenger's needs, where relevant clearly confirming the agreed transport arrangements, and check their understanding of them			
4	give clear explanations and suggestions to the prospective passenger about alternative transport arrangements if their requirements cannot be met and give the caller enough time to seek clarification of these alternatives			
5	confirm clearly to the prospective passenger the agreed alternatives and check that they understand and agree them			
6	identify, within the limits of your responsibility, when a caller needs help beyond that provided by the organisation and take appropriate action in agreement with the caller			
7	make a correct record of all telephone conversations, in particular the agreed transport arrangements, or other help offered, in line with your organisation's procedures and legislation			
8	record and update customer records.			

*continued overleaf...*

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 21 Take Telephone Bookings in Road Passenger Transport Operations				
<b>Element:</b> 21.2 Communicate Changes to Transport Arrangements				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	call prospective passengers if previously agreed transport arrangements cannot be met in line with your organisation's procedures, for example, because of a vehicle breaking down or the driver being ill			
2	make sure that the prospective passenger is aware of the change of plan to the transport arrangements, for example, change of pick up time			
3	identify any problems likely to arise to the prospective passenger as a result of the change of transport arrangements			
4	give clear suggestions about alternative transport arrangements and give the prospective passenger enough time to seek clarification of these alternatives			
5	confirm clearly to the prospective passenger the agreed alternatives and check that they understand them			
6	contact as appropriate, in line with your organisational procedures, other staff to help ensure agreed transport arrangements with the prospective passenger are taken forward			
7	make a correct record of all telephone conversations, in particular the agreed transport arrangements, or other help offered, in line with your organisation's procedures.			

*continued overleaf...*

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**

## Knowledge evidence record

<b>NVQ title and level:</b>									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 21 Take Telephone Bookings in Road Passenger Transport Operations</p> <p><b>Element title:</b> 21.1 Identify the Prospective Passenger's Transport Requirements</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a how to use the telephone and any associated IT equipment that you will be using									
b how to use and update your organisation's customer information storage system									
c the transport services offered by your organisation and contact points in other support organisations such as Social Services and the Ambulance Service									
d the legislation relevant to your work eg the Disability Discrimination Act									
e how to listen effectively and question prospective passengers in a way that is seen as supportive and helpful									
f the importance of your tone of voice and ways of expressing yourself in giving a good impression of the organisation									
g how to communicate with callers who have speech or hearing difficulties or language/dialect differences to your own									

*continued overleaf...*

Knowledge and understanding for this unit: You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h how to check that a prospective passenger understands the agreed transport arrangements through, for example, using questions and providing a straightforward summary									
l how to identify and communicate with callers who need assistance over and above arranging transport									
j the local route knowledge and operating conditions									
k your organisation's procedures and guidelines for collecting, retrieving and updating customer service information									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

## Knowledge evidence record

<b>NVQ title and level:</b>									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 21 Take Telephone Bookings in Road Passenger Transport Operations</p> <p><b>Element:</b> 21.2 Communicate Changes to Transport Arrangements</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a your organisation's current operational activity and implications for pre-booked passenger journeys									
b the action you should take if you cannot contact prospective passengers by telephone									
c how to summarise operational difficulties in an understandable way and the various alternatives that might apply									
d how to listen effectively and question prospective passengers in a way that is seen as supportive and helpful									
e the importance of your tone of voice and ways of expressing yourself in giving a good impression of the organisation									
f how to communicate with callers who have speech or hearing difficulties or who speak a language or dialect different to your own									

*continued overleaf...*

Knowledge and understanding for this unit: You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
g how to check that a prospective passenger's understanding of the revised transport arrangements through for example using questions and providing a straightforward summary									
h your organisation's arrangements for recording the telephone contact and progressing agreed arrangements.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 22: Sell Products or Services Face-to-face in Road Passenger Transport Operations (MSSSB Unit 7.2)

### What is the unit about?

This unit is about selling to customers face-to-face. Some contact with your customers may be via telephone, email or in writing but successful performance in this unit involves direct contact with customers.

The unit aims to encourage sales performance in a number of areas but in particular after initial contact has been made with customers. This unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

This unit consists of one element:

Element 22.1 – Sell Products or Services Face-to-face.

This element is about the effective selling of products and services face-to-face with the customer. In doing so it is important to understand the behaviours which underpin effective performance, such as:

- keeping customer focused at all times
- showing respect for customers and understand and empathise with their views
- avoiding prejudging customers based on appearance, behaviour and communication
- being honest, sincere and ethical in your chosen sales approach
- communicating articulately and effectively, listen actively and adopt an appropriate communication strategy for each customer
- demonstrating an in-depth knowledge and understanding of products and services on offer
- using the most effective questioning technique for your sales situation
- adapting to different audiences and their requirements
- working with other sales team members to avoid duplication of tasks and to maximise sales opportunities.

### Who is this unit for?

This unit is suitable for those who are involved in the selling of products and services. This may be telesales, sales executives and sales team leaders.

*continued overleaf...*

## **Glossary**

### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

### *Colleague*

Fellow worker.

### **Links to other units**

This unit is based on Unit 7.2 from the Marketing and Sales Standards Setting Body

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 22 Sell Products or Services Face-to-face in Road pPassenger Transport Operations				
<b>Element:</b> 22.1 Sell Products or Services Face-to-face				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests			
2	identify products or services which match your customer's needs and confirm with your customer that they are suitable			
3	interpret buying signals which are given by your customer and act on them to progress sales			
4	structure the face to face sales discussion effectively to include an overview of key features and benefits of products and services and give your customer the opportunity to fully discuss and assess them			
5	provide your customer with materials to support the promotion of products or services			
6	evaluate potential trade-offs that will be mutually beneficial to your customer and to your organisation			
7	record, analyse and act on any area in which your product or service does not meet your customer's requirements			
8	give your customer clear information and make proposals that meet their requirements			

*continued overleaf...*

<b>Performance criteria:</b> You must be able to:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
9 obtain the support of colleagues when looking to overcome customer objections and meet customer needs				
10 close the sale by gaining the commitment of your customer and complete the formalities of the sale following organisational procedures .				

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 22 Sell Products or Services Face-to-face in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the structure of your organisation and its products or services									
b the target market for your organisation and its significant features									
c the sales targets for your own area of responsibility and the limits of your personal authority									
d the sales cycle and how it helps sales team members to structure and progress their sales contacts									
e the differences between proactive and reactive selling									
f the techniques that can be applied when selling in face-to-face situations, including cross-selling, up-selling and the sale of add-ons									
g the methods for assessing maximum and minimum returns and how to prioritise									
h development of leads according to potential value and probability of closure									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
l the verbal and non-verbal listening and questioning techniques suitable for selling in face-to-face situations									
j the differences between benefits and features and how to sell them effectively									
k how to involve your prospect in reaching a solution to any sales problem									
l the methods for recording messages accurately and ensuring they are dealt with by appropriate people promptly									
m the range of behaviours displayed by customers and how to manage them constructively									
n how to overcome customers' objections sensitively and constructively and how to respond effectively to their queries									
o the effective methods for closing sales									
p how to evaluate and measure the success of face-to-face sales contacts .									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>



## Unit summary sheet

# Unit 23: Sell Products or Services Over the Telephone in Road Passenger Transport Operations (MSSSB Unit 7.3)

### What is the unit about?

This unit is about identifying, developing and closing cost effective sales over the telephone from both inbound and outbound calls.

The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

This unit consists of one element:

Element 23.1 – Sell Products or Services Over the Telephone.

This element is about the effective selling of products and services over the telephone. In doing so it is important to understand the behaviours which underpin effective performance, such as:

- showing respect for customers and understand and empathise with their views
- being honest, sincere and ethical in your telephone sales approach
- communicating articulately and listen actively
- adopting appropriate verbal and non-verbal communication options
- using the most effective questioning techniques for the sales situation
- adapting your behaviour to audience requirements
- working with other sales team members to avoid duplication and maximise sales opportunities.

### Who is this unit for?

This unit is suitable for those who are involved in the selling of products and services. This may be telesales, sales executives and sales team leaders.

### Glossary

#### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

#### *Colleague*

Fellow worker.

### Links to other units

This unit is based on Unit 7.3 from the Marketing and Sales Standards Setting Body.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 23 Sell Products or Services Over the Telephone in Road Passenger Transport Operations				
<b>Element:</b> 23.1 Sell Products or Services Over the Telephone				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify your objectives for selling products and services over the telephone both by making and receiving calls			
2	use call lists or leads provided by your organisation and prospect those most likely to produce sales			
3	assess the potential of prospects and prioritise calls according to value and probability of closure			
4	plan sales calls and identify how to obtain customer information and relaying key sales messages			
5	use structured questions to obtain information from prospective customers about their needs			
6	use structured questions to explain the major benefits of using key products or services and to demonstrate their compatibility with features and functions			
7	explain the benefits and features of your products or services, interpret your prospect's reaction to those and decide how best to progress the sale			
8	deal with customer queries and objections with clear and accurate responses			
9	agree the basis of your customer's interest and their overall requirements			
10	gain a commitment from your customer and close the sale			

*continued overleaf...*

<b>Performance criteria:</b> You must be able to:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
11 grasp opportunities to develop a positive relationship with customers and identify and pursue further customer contact				
12 provide customer feedback and reaction to products or services to appropriate people in your own organisation.				

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<p><b>Unit title:</b> Unit 23 Sell Products or Services Over the Telephone in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:										
a	the structure of your organization and its products or services									
b	your organisation's target market and its significant features									
c	the sales targets for your own area of responsibility and the limits of your personal authority									
d	the sales cycle and how it helps sales team members to structure and progress their sales contacts									
e	the differences between inbound and outbound telephone selling									
f	the different situations in which telephone selling is appropriate and the advantages and disadvantages of selling by telephone									
g	the differences between proactive and reactive selling									
h	techniques that can be applied when selling on the telephone, including cross-selling, up-selling and selling add-ons									

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
i the methods for assessing maximum and minimum potential and how to prioritise calls according to value and probability of closure									
j the verbal, non-verbal, listening and questioning techniques suitable for selling over the telephone									
k how to operate your telephone system efficiently									
l the differences between benefits and features and how to sell them effectively									
m how to involve your prospect in developing and closing a sale									
n methods for recording messages accurately and ensuring they are dealt with by relevant people promptly									
o the range of behaviours displayed by customers and how to manage them constructively									
p how to overcome customers' objections sensitively, constructively and effectively									
q the effective methods for closing sales									
r how to evaluate and measure the success of telephone sales calls									
s the range of interactive ICT options available to support effective telephone sales activities.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 24: Recording Income and Receipts (AOSG Unit 1)

### What is the unit about?

This unit relates to the role of invoicing and receiving payments and keeping the financial books on a daily basis in line with your organisation's financial systems and procedures.

The unit consists of two elements:

Element: 24.1 – Process Documents Relating to Goods and Services Supplied

Element: 24.2 – Process Receipts.

#### *Element 24.1*

This element involves you in manually preparing and coding invoices and credit notes for goods and services supplied, and entering the details in both a manual and computerised accounting system. The element also requires you to prepare statements of account manually, and as computerised output. It is expected that you will communicate with customers politely and effectively in response to their queries or when chasing payments.

#### *Element 24.2*

This element is concerned with checking and recording receipts in a manual and computerised system. The element requires you to deal with receipts in a variety of different forms and, therefore, to complete paying-in documents where necessary. You are required to deal with unusual features relating to wrongly completed cheques, out-of-date cheques, debit or credit card limits exceeded and disagreement with supporting documentation. Where these features are outside of your own area of responsibility the element expects you to refer them to an appropriate person.

### Who is this unit for?

This unit is for those who are responsible for financial records in Road Passenger Transport Operations. It should be noted that within the drivers suite there is a unit specifically on handling in processing fares and associated cash handling.

### Glossary

#### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

### Links to other units

This is a reformatted unit of the same title owned by the Accountancy Occupational Standards Group where it appears as unit 1 in the Accountancy suite.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 24 Recording Income and Receipts				
<b>Element:</b> 24.1 Process Documents Relating to Goods and Services Supplied				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	prepare accurately invoices and credit notes taking regard of pricing, price extensions, discounts and VAT in accordance with organizational requirements and check as appropriate against quotations, purchase orders, delivery notes and sales orders			
2	ensure invoices and credit notes are correctly authorised before being sent to customers			
3	ensure invoices and credit notes are correctly coded using as appropriate manual or computer systems			
4	enter invoices and credit notes into books of prime entry which include a manual sales day book, manual sales returns daybook and relevant computer systems according to organisational procedures			
5	enter invoices and credit notes in the appropriate computer, main manual and subsidiary manual ledgers as appropriate			
6	produce manual or computer statements of account for dispatch to debtors			
7	respond to queries and chase payments politely and effectively with customers regarding accounts, using the relevant information from the aged debtors analysis.			

*continued overleaf...*

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 24 Recording Income and Receipts				
<b>Element:</b> 24.2 Process Receipts				
<b>Performance criteria:</b> You must be able to:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	check cash, cheques and automated payment receipts against relevant supporting information			
2	enter receipts in as appropriate in computerised records, manual cash book or manual main or sales ledger			
3	prepare paying-in documents and reconcile to relevant records			
4	identify wrongly completed or out-of-date cheques, credit and debit cards with limits exceeded and discrepancies with supporting documents and either resolve or refer to the appropriate person.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 24 Recording Income and Receipts									
<b>Element:</b> 24.1 Process Documents Relating to Goods and Services Supplied									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
<b>The Business Environment</b>									
a	the types of business transactions and documents involved								
b	the basic law relating to contract law and Sale of Goods Act (Document retention policies General principles of VAT)								
c	the organisation's document retention policies								
d	the general principles of VAT								
e	the types of discounts								
f	how to operate within credit limits								
g	the methods of coding data								
<b>Accounting Methods</b>									
h	how to use double entry bookkeeping, including balancing accounts								
i	how to account for receipts from credit customers and customers without credit accounts								
j	the methods of coding								

*continued overleaf...*

Knowledge and understanding for this unit You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
k how to operate of manual and computerised accounting systems									
l the use of the cash book and petty cash book as part of the double entry system or as books of prime entry									
m how to operate batch control									
n the relationship between accounting system and the ledger									
o the petty cash procedures: imprest and non-imprest methods; analysis									
<b>The Organisation</b>									
p the organisation's accounting systems and administrative systems and procedures relevant to your work									
q the nature of the organisation's business transactions									
r the organisational procedures for authorising and coding of sales invoices									
s the organisational procedures for filing source documents									
t the house style for correspondence									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations											
<b>Candidate:</b>					<b>Assessor:</b>						
<b>Unit title:</b> Unit 24 Recording Income and Receipts											
<b>Element title:</b> 24.2 Process Receipts											
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>											
<b>Knowledge and understanding for this unit:</b>				<b>Type of evidence</b>							
				EI	O	P	WT	S	APEL	Q&A Date	EWE
You must know and understand:											
<b>The Business Environment</b>											
a the basic law relating to contract law and Sale of Goods Act (Document retention policies General principles of VAT											
b the organisation's document retention policies											
c how to read cheques, including crossings and endorsements											
d how to use banking documentation											
e how to operate automated payments											
f how to operate within credit limits											
g the basic law relating to data protection											
<b>Accounting Methods</b>											
h how to use double entry bookkeeping, including balancing accounts											
i how to account for receipts from credit customers and customers without credit accounts											

*continued overleaf...*

Knowledge and understanding for this unit: You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
j how to operate of manual and computerised accounting systems									
k the use of the cash book and petty cash book as part of the double entry system or as books of prime entry									
l how to operate batch control									
m the relationship between accounting system and the ledger									
n the credit card procedures									
o the methods of handling and storing money, including the security aspects									
p the petty cash procedures: imprest and non-imprest methods; analysis									
<b>The Organisation</b>									
q the organisation's accounting systems and administrative systems and procedures relevant to your work									
r the nature of the organisation's business transactions									
s the organisational procedures for filing source documents									
t the banking and personal security procedures.									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Unit summary sheet

# Unit 25: Provide Support to Passengers with a Severe Disability

### What is the unit about?

This unit is about providing support to passengers with a severe disability and who cannot be moved without support (For example, they may be confined to a wheelchair, stretcher or trolley). You should be able to prepare for moving passengers and working closely with the vehicle driver to provide support during the journey and ensure passenger wellbeing and safety. You should know and understand the types of problems likely to arise and how to deal with them and how to use any special equipment or systems required by passengers who have special requirements.

This unit consists of two elements:

Element 25.1 – Prepare for the Movement of Passengers

Element 25.2 – Support Passengers During the Journey.

#### *Element 25.1*

This element is about preparing for the movement of passengers with a severe disability who cannot be moved without additional support (For example, they may be confined to a wheelchair, stretcher or trolley). You need to make sure the necessary resources are available to move the passenger and to decide on the assistance you are able to give. You will need to know and be able to follow the requirements of relevant laws and codes of practice, while knowing the limits of your ability and responsibility when you consider what assistance to give. In particular you should establish a close working relationship with the driver of the vehicle and work as a team to ensure the passenger's safety and wellbeing. You should, where possible, offer assistance to passengers before you are asked and communicate with passengers and drivers in a polite and considerate way.

#### *Element 25.2*

This element is about providing support during a journey to passengers with a severe disability and who cannot be moved without support (For example, they may be confined to a wheelchair, stretcher or trolley). You will need to support the passenger safely and securely and treat them with dignity during the journey. You will need to know and be able to follow the requirements of relevant laws and codes of practice, while knowing the limits of your ability and responsibilities and those of the vehicle driver when you consider what assistance to give during the journey. In particular you should establish a close working relationship with the driver of the vehicle, working as a team to ensure the passenger's wellbeing. You should offer assistance before you are asked, where possible, and communicate with passengers in a polite and considerate way.

### Who is this unit for?

This unit is for those who provide passenger support.

*continued overleaf...*

## **Glossary**

### *Passenger with a severe disability*

A passenger who cannot be moved without considerable support, for example; the passenger may be confined to a wheelchair, stretcher or trolley

### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal requirements

## **Links to other units**

This unit is based on Unit 11 from the *GoSkills* Road Passenger Vehicle Driving suite.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 25 Provide Support to Passengers with a Severe Disability				
<b>Element:</b> 25.1 Prepare for the Movement of Passengers				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	check with the driver that the vehicle has the resources to move the passenger			
2	confirm with the driver that the vehicle has the correct type and amount of equipment for seating and securing passengers and/or wheelchairs, stretchers or trolleys before starting the journey and carry out approved safety checks working as appropriate with the driver			
3	communicate clearly with passengers, the driver and, where relevant, other carers			
4	clearly explain to the passenger, and where relevant the driver, the procedures for moving them			
5	treat the passengers with dignity at all times			
6	check, where relevant, that any necessary accompanying documents are available			
7	check as appropriate with the driver that all the equipment for moving the passenger is safe and working correctly			
8	co-operate where appropriate with other carers involved to move the passenger as safely and comfortable as possible			
9	take the appropriate action in discussion with the driver where problems arise that may affect how the passengers are supported			
10	keep to relevant legislation and codes of practice when deciding on the help you give.			

*continued overleaf...*

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 25 Provide Support to Passengers with a Severe Disability				
<b>Element:</b> 25.2 Support Passengers During the Journey				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	assist the passengers and where relevant other carers to get in the vehicle at the start of the journey			
2	give help to passengers during the journey in line with their needs			
3	communicate effectively with passengers, their carers and the vehicle driver as appropriate			
4	treat the passengers with dignity at all times			
5	make sure the passengers are safe and secure throughout the journey working as appropriate with the driver			
6	assist the passenger to leave the vehicle at the end of the journey			
7	make sure the passengers are receiving the appropriate level of support at the end of the journey, for example, making sure the passengers are transferred to suitable carers			
8	keep to relevant legislation and codes of practice when deciding on the help you give.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 25 Provide Support to Passengers with a Severe Disability									
<b>Element:</b> 25.1 Prepare for the Movement of Passengers									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the importance of providing help to passengers and, where relevant, other carer(s)									
b the requirements of relevant legislation and codes of practice relating to providing help									
c how to check that the passenger's support equipment can be moved safely									
d the limits of your ability and responsibilities and the responsibilities of the driver when providing help to passengers									
e how to communicate with passengers, other carers and the driver									
f the equal opportunities and the rights of disabled passengers to travel safely, comfortably and with dignity									
g how to use different types of equipment for safely seating and securing passengers and wheelchairs, stretchers or trolleys									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 25 Provide Support to Passengers with a Severe Disability									
<b>Element:</b> 25.2 Support Passengers During the Journey									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the importance of providing help to passengers and, where relevant, their carer(s)									
b the requirements of relevant legislation and codes of practice when providing help									
c how to recognise the differences in passengers' special requirements									
d the limits of your ability and responsibility when providing help to passengers and the responsibilities of the driver									
e how to provide support to transport passengers safely and the special equipment and systems needed by passengers with special requirements									
f how to communicate with passengers while giving help and making them feel at ease during the journey									
g the equal opportunities and the rights of disabled passengers to travel safely and comfortably and with dignity									

*continued overleaf...*

<b>Knowledge and understanding for this unit:</b> You must know and understand:	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h the types of problems likely to arise and how to handle them with the driver as appropriate									

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

<b>Candidate's signature:</b>	<b>Date:</b>
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Internal verifier's signature:</b>	<b>Date:</b>

<b>COLUMN KEY:</b>	<b>EI = EVIDENCE INDEX NUMBER</b>	<b>O = OBSERVATION</b>	<b>P = PERSONAL STATEMENT</b>
	<b>WT = WITNESS TESTIMONY</b>	<b>S = SIMULATION</b>	<b>APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING</b>
	<b>Q&amp;A = QUESTIONS &amp; ANSWERS</b>	<b>EWE = EXPERT WITNESS EVIDENCE</b>	<b>PD = PROFESSIONAL DISCUSSION</b>

## Unit summary sheet

# Unit 26: Provide Support to Passengers who Require Assistance

### What is the unit about?

This unit is about providing support for passengers who require assistance. These may include, for example, children, those showing challenging behaviour, the elderly, and passengers with physical, mental and sensory difficulties. You should be able to prepare for and provide such assistance to the passengers working closely with the vehicle driver. You should know and understand the appropriate ways to offer assistance and how to operate equipment needed for transporting passengers who require assistance. It is important that you know and understand your role and relationship with the vehicle driver.

This unit consists of two elements:

Element 26.1 – Prepare for Journeys with Passengers who Require Assistance

Element 26.2 – Support Passengers During the Journey.

### *Element 26.1*

This element is about how you make sure you have the correct and complete information on any special requirements for the passengers you are supporting. You will also need to confirm with the driver that you have the correct type and amount of equipment for seating and securing passengers and when appropriate wheelchairs, and that it is safe to use. If this equipment is defective you must know how to report details of the defects.

### *Element 26.2*

This element is about how you will provide safe and comfortable support to passengers who require assistance. This includes picking up and setting down passengers, helping passengers on and off the vehicle using steps or lifts and using the correct equipment to seat and secure passengers and wheelchairs where appropriate.

### Who is this unit for?

This unit is for those who provide passenger support.

*continued overleaf...*

## **Glossary**

### *Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

### *Challenging behaviour*

The term 'challenging behaviour' has been used to refer to the 'difficult' or 'problem' behaviours which may be shown by children or adults with a learning disability. Such behaviours include

- aggression, for example, hitting, kicking, biting
- destruction, for example, ripping clothes, throwing objects
- self-injury, for example, head banging, self-biting, skin picking
- tantrums and many other behaviours, for example, eating inedible objects, rocking or other stereotyped movements

Characteristically, challenging behaviour puts the safety of the person or others in some jeopardy.

### **Links to other units**

This unit is based on Unit 6 from the *GoSkills* Road Passenger Vehicle Driving suite.

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 26 Provide Support to Passengers who Require Assistance				
<b>Element:</b> 26. 1 Prepare for Journeys with Passengers who Require Assistance				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	make sure any special information about the passengers you are supporting is complete			
2	establish a good working relationship with the vehicle driver			
3	confirm that you have the correct type and amount of equipment for seating and securing passengers and/or wheelchairs before starting your journey and carry out with the driver as appropriate approved safety checks			
4	report defects in any passenger support equipment in line with your organisation's procedures			
5	confirm that all documents relating to passenger support are correct and in line with organisational requirements.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 26 Provide Support to Passengers who Require Assistance				
<b>Element:</b> 26.2 Support Passengers During the Journey				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	maintain good working relationships with the vehicle driver			
2	support passengers as they get in and out of the vehicle			
3	help passengers onto and off the vehicle in line with relevant legislation and codes of practice			
4	use relevant passenger lifts and equipment in line with your organisation's procedures			
5	make sure the seatbelts are used correctly in the vehicle			
6	deal with passenger requests for assistance in a way that meets their needs and protects their dignity at all times			
7	provide support in a way that makes sure passengers are safe and comfortable			
8	take appropriate action in line with your organisation's procedures if any passenger is not at their agreed pick-up point			
9	take appropriate action in line with your organisation's procedures if there are unplanned problems with passengers on the journey			
10	fill in all the necessary documents relating to journeys and pass them to the appropriate person.			

**Feedback/comments:**

**Assessor's signature:**

**Date:**

**Candidate's signature:**

**Date:**



## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<b>Unit title:</b> Unit 26 Provide Support to Passengers who Require Assistance									
<b>Element:</b> 26.1 Prepare for Journeys with Passengers who Require Assistance									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit</b>	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a the importance of having relevant details of the passengers you are carrying such as specific information about their requirements or any information that will add to their safety and comfort									
b the importance of knowing the limits of your responsibilities and that of the vehicle driver									
c the relevant legal requirements including as appropriate the relevant parts of the Disability Discrimination Act and any relevant codes of practice for transporting passengers who may be children, wheelchair users etc									
d how to use of different types of equipment for seating and securing passengers									
e how to carry out approved safety checks on equipment for seating and securing passengers on the vehicle working as appropriate with the vehicle driver									
f the equipment defect reporting arrangements									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Knowledge evidence record

NVQ title and level: Edexcel Level 2 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p><b>Unit title:</b> Unit 26 Provide Support to Passengers who Require Assistance</p> <p><b>Element:</b> 26.2 Support Passengers During the Journey</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
<b>Knowledge and understanding for this unit:</b> You must know and understand:	<b>Type of evidence</b>								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a appropriate methods of offering and giving help to passengers									
b the dangers and risks associated with picking up and setting down passengers									
c the equal opportunities and the rights of passengers to travel safely and comfortably									
d the requirements and importance of using passenger lifts and equipment on the vehicle and the relevant legislation relating to using seatbelts									
e the importance of knowing the limits of your responsibilities and that of the vehicle driver									
f approved procedures for dealing with defective passenger-safety equipment									
g the action you can take in discussion with the vehicle driver where passengers are not at their agreed pick-up points									

*continued overleaf...*

Knowledge and understanding for this unit: You must know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h the relevant legal requirements including as appropriate the relevant parts of the Disability Discrimination Act and any relevant codes of practice for transporting passengers who may be children, wheelchair users etc.									

<b>Feedback/comments:</b>	
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.	
<b>Candidate's signature:</b>	<b>Date:</b>
<b>Assessor's signature:</b>	<b>Date:</b>
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## Unit summary sheet

# Unit 27: Monitor Revenue Protection and Timetables in Road Passenger Transport Operations

### What is the unit about?

This unit is about making sure that fare income is properly received by the company and that as far as possible scheduled vehicles run to timetable. You will be primarily working on specified routes and you will be able to arrange ticket checks on vehicles. You should know, understand and comply with your organisation's policies and procedures both on revenue protection and timetable compliance.

Communication with passengers, drivers, members of the inspection team and other relevant external organisations, for example, the police, is an important part of this unit.

This unit comprises of two elements:

Element 27.1 – Monitor Your Organisation's Fare Policies

Element 27.2 – Monitor Timetable Adherence.

#### *Element 27.1*

This element is about making sure that ticket prices are appropriate for the journeys undertaken in line with your organisation's fare policies. You should be able to arrange ticket checks on vehicles. You should know and understand your organisation's conditions and fare structure and how to arrange checks on drivers and travellers.

#### *Element 27.2*

This element is about checking that vehicles are running in line with the timetable and dealing with any problems that may occur, for example, rescheduling due to a traffic accident. You should know and understand how to communicate effectively with drivers, depot staff and customers.

### Who is this unit for?

This unit is for staff, working in the Road Passenger Transport Industry, who carry out timetable and revenue inspection roles.



## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 27 Monitor Revenue Protection and Timetables in Road Passenger Transport Operations				
<b>Element:</b> 27.1 Monitor Your Organisation's Fare Policies				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	implement your organisation's conditions of carriage			
2	implement your organisation's policies on fares			
3	arrange for appropriate ticket checks on vehicles taking into account customer/public safety			
4	deal with difficult situations that arise from the appropriate ticket checks			
5	complete paperwork in line with your organisation's procedures			
6	liaise with appropriate authorities if irregularities occur, for example, your organisation's staff, police or other regulatory bodies as appropriate.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Element achievement record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations				
<b>Candidate:</b>				
<b>Assessor:</b>				
<b>Unit title:</b> Unit 27 Monitor Revenue Protection and Timetables in Road Passenger Transport Operations				
<b>Element:</b> 27.2 Monitor Timetable Adherence				
<b>Performance criteria:</b> You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
a	check that vehicles are running to schedule			
b	find out from drivers the reasons for deviation from timetable and take appropriate action			
c	quickly identify problems that may cause an interruption to a service, for example, unscheduled road repairs, traffic accident etc			
d	report problems to depot staff and, if appropriate, external bodies and obtain details of contingency arrangements			
e	make sure all staff involved, particularly drivers, are aware of contingency arrangements and if appropriate inform customers			
f	complete paperwork in line with your organisation's procedures.			

<b>Feedback/comments:</b>	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>

## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations									
<b>Candidate:</b>					<b>Assessor:</b>				
<p><b>Unit title:</b> Unit 27 Monitor Revenue Protection and Timetables in Road Passenger Transport Operations</p> <p><b>Element:</b> 27.1 Monitor Your Organisation's Fare Policies</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
You must know and understand:									
a your organisation's conditions of carriage									
b your organisation's fares policy covering your area of responsibility									
c how to arrange ticket checks on vehicles									
d the terms and conditions of travel cards that could be held by passengers									
e how to deal with difficult situations that might arise with drivers and passengers									
f how to identify potential fraud activity									
g the limits of your authority in revenue protection and the role of others involved									
h your organisation's procedures for completing paperwork and keeping records relating to revenue protection									
i the appropriate authorities to report irregularities to, for example, your organisation's staff, police etc									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Knowledge evidence record

<b>NVQ title and level:</b> Edexcel Level 2 NVQ in Road Passenger Transport Operations										
<b>Candidate:</b>					<b>Assessor:</b>					
<b>Unit title:</b> Unit 27 Monitor Revenue Protection and Timetables in Road Passenger Transport Operations										
<b>Element:</b> 27.2 Monitor Timetable Adherence										
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is <b>important to read the knowledge requirements in relation to expectations and requirements of your job role.</b></p> <p>You need to show that you know, understand and can apply in practice:</p>										
<b>Knowledge and understanding for this unit:</b>		<b>Type of evidence</b>								
		EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a	the timetables relevant to the area in which you are working									
b	traffic flows in the area in which you are working									
c	how to assist drivers to meet their schedules									
d	your organisation's policy in dealing with drivers who consistently do not run to schedule									
e	the road system in the area you work and in particular potential hazards for your organisation's vehicles, for example, low bridges, weight restrictions etc									
f	the limits of your authority in dealing with any contingency situation and the role of others involved									
g	our organisation's procedures for completing paperwork and keeping records relating to revenue protection.									

*continued overleaf...*

**Feedback/comments:**

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

**Candidate's signature:**

**Date:**

**Assessor's signature:**

**Date:**

**Internal verifier's signature:**

**Date:**

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## Evidence requirements

Road Passenger Transport Operations		Performance Requirements										Knowledge and Understanding Requirements		
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion		
1	Make Sure Your Own Actions Reduce Risks to Health and Safety	1.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
2	Achieve Effective Working Relationships with Colleagues in the Road Passenger Transport Industry	2.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		2.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		2.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
3	Provide Professional Customer Service in the Road Passenger Transport Industry	3.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		3.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		3.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
8	Support Learners by Coaching in the Workplace	8.1	X	✓	✓	X	✓	X	✓	✓	✓	✓		
9	Develop and Maintain Your Work Skills and Knowledge in the Road Passenger Transport Industry	9.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
10	Manage Conflict in the Road Passenger Transport Industry	10.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		10.2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Road Passenger Transport Operations		Performance Requirements										Knowledge and Understanding Requirements			
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion			
11	Working with Computers	11.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		11.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
14	Process Customer Service Complaints	14.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		14.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
15	Deal with Customers in Writing or Using ICT	15.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		15.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		15.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
16	Deal with Customers by Telephone	16.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		16.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		16.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
17	Deal with Customers Face-to-face (ICS)	17.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		17.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
18	Support Customer Service Improvements	18.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		18.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		18.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
19	Prepare Vehicle and Driver Rotas for Road Passenger Transport Timetabled Operations	19.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		19.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓			
		19.3	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			

Road Passenger Transport Operations		Performance Requirements										Knowledge and Understanding Requirements		
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion		
20	Implement Road Passenger Transport Schedules	20.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
21	Take Telephone Bookings in the Road Passenger Transport Industry	21.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		21.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
22	Sell Products or Services Face-to-face in the Road Passenger Transport Industry	22.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
23	Sell Products or Services Over the Telephone in the Road Passenger Transport Industry	23.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
24	Recording Income and Receipts	24.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		24.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		
25	Provide Support to Transport Passengers with a Severe Disability	25.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		25.2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
26	Provide Support to Passengers who Require Assistance	26.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		26.2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
27	Monitor Revenue Protection and Timetables in Road Passenger Transport*	27.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
		27.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓		

\* Simulation allowed for PC4 only

## Glossary

This section provides explanations and definitions of the key words used in this NVQ. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way. **Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required.**

<b>Assessment</b>	the process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
<b>Assessor</b>	the person in a centre designated to be responsible for collecting evidence of candidate's competence, judging it and recording achievement.
<b>Authentication</b>	the process by which an advisor or assessor confirms that assessment activity has been undertaken by a particular candidate and that all regulations governing the assessment have been observed.
<b>Candidate</b>	the person enrolling for an Edexcel NVQ.
<b>Centre</b>	the college, training organisation, school or workplace where Edexcel qualifications are delivered and assessed.
<b>Evidence</b>	materials the candidate has to provide as proof of their competence against specified achievement criteria.
<b>External verifier</b>	the person appointed by Edexcel who is responsible for the quality assurance of a centre's provision. An external verifier is often appointed on a subject area basis or for groups of similar units.
<b>Instrument of assessment</b>	a means of generating evidence of the candidate's performance.
<b>Internal verifier</b>	the person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently.
<b>Mentor</b>	a person who carries out, either singly or in combination, the functions of advising a candidate, collecting evidence of his or her competence on behalf of the assessor, and authenticating the work candidates have undertaken. A mentor might also provide witness testimony.
<b>Observation</b>	a means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria.
<b>Performance criteria</b>	statements which describe the standard to which candidates must perform the activities.

<b>Portfolio</b>	a compilation of evidence which can form the basis for assessment. The portfolio is commonly used in NVQ awards and in alternative routes to assessment such as APL and credit transfer.
<b>Product evaluation</b>	a means of assessment which enables the quality of a product produced by the candidate, rather than the process of producing it, to be evaluated.

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