

U13002: Develop customer relationships

Unit Descriptor:

Long term customer relationships depend on the creation of a positive impression. They also depend on the delivery of consistent and reliable customer service. This will encourage loyalty from external customers or long term service partnerships with internal customers.

With external customers, building a better relationship will encourage customer loyalty. What you do will form or continue a long term customer relationship. This does not mean that you have to deal with the same customers every time they return. However, some of what you do will affect their decision to form or maintain that long term link with your organisation.

With internal customers, building a better relationship will improve the efficiency of the organisation and the way that different parts of it work together.

For this unit you must demonstrate that you have developed customer relationships with external or internal customers or both.

It is important to build their confidence, make them aware of the exact products or services you have to offer and explore their expectations.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

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| 1. Build customer confidence in the level of service provided | 1.1 Deal with your customers promptly.
1.2 Communicate with your customers in a way that provides confidence and reassurance in their dealings with your organisation.
1.3 Manage the time taken to deal with your customers in accordance with organisational guidelines.
1.4 Reassure your customers that you are doing everything possible to keep the commitments made by your organisation. |
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| 2. Meet the ongoing needs and expectations of your customers | 2.1 Operate within the limits of your own authority in attempting to meet your customers' and your organisation's needs. |
| | 2.2 Recognise when there may be a conflict between the needs of your customers and your organisation. |
| | 2.3 Take all reasonable actions to minimise the conflict between your customers' needs and the products or services offered by your organisation. |
| | 2.4 Work effectively with others to resolve difficulties in meeting the needs of your customers and your organisation. |
| 3. Develop the relationship between your customers and your organisation | 3.1 Give additional help and information to your customers in response to their questions and comments about the products or services your organisation provides. |
| | 3.2 Discuss expectations with your customers and explain how these compare with the products or services you and your organisation provide. |
| | 3.3 Inform others of feedback received from your customers and follow up within limits of your authority. |
| | 3.4 Identify new ways of helping your customers based on the feedback they have given you. |

RANGE STATEMENT

You must cover the items below:

Element 1: Build customer confidence in the level of service provided**A. Communicate:**

- (i) face-to-face methods (including verbal and non-verbal communication)
- (ii) using the telephone
- (iii) using written (including electronic) methods

Element 2: Meet the ongoing needs and expectations of your customers**A. Minimise conflict by:**

- (i) making use of alternative products or services offered by the organisation
- (ii) making an exception to the service you would normally offer

Element 3: Develop the relationship between your customers**A. Identify new ways of helping your customers by:**

- (i) making use of alternative products or services offered by the organisation
- (ii) making an exception to the service you would normally offer

UNDERPINNING KNOWLEDGE AND SKILLS**Legislation and regulations**

1. What are your customers' rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunities
 - d. disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any; customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communications

9. How would you communicate in a clear, polite, confident way and why this is important.
10. How to deal with persons with diverse backgrounds and abilities (e.g. age, cultural, social and religious backgrounds).

UNDERPINNING KNOWLEDGE (continued)

You need to understand:

Additional knowledge and understanding for Unit 3

11. How your behaviour will affect the behaviour of your customer.
12. How to behave assertively and professionally in times of conflict.
13. How to diffuse potentially stressful situations.
14. The limitations of what you are able to offer your customer.
15. How your customers' needs and expectations may change as they deal with your organisation.
16. The implications to your organisation in terms of resources and cost when you meet your customers' needs.
17. Who you will need to negotiate with to find a solution.

EVIDENCE GUIDE**1. Critical Aspects of Evidence**

You must prove that you have been working to improve your own and your organisation's relationships with your customers.

You must produce evidence that show you have done this over a period of time with different customers on different occasions.

2. Methods of Assessment**Performance Evidence**

You must include evidence that shows how you have achieved this unit:

- a. through your own individual efforts
- b. by working with others

The communication you have with your customer may be written, verbal or in some other form, e.g. sign language.

Evidence of meeting the needs and expectations of your customer and your organisation must include actions you have taken:

- c. without being asked
- d. at your customers' request

To overcome conflict between your customer and your organisation you must show that you have:

- a. made use of alternative products or services offered by the organisation
- b. made an exception to the service you would normally offer

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Performance Evidence for this unit could include:

- Observation reports by your assessor recording how you are able to use your communication skills to build customer relationships.
- Witness testimonies from managers or colleagues from your own and other departments which describe how you have provided them with a consistently high level of customer service over a period of time.

Supplementary Evidence for this unit could include:

- A professional discussion with your assessor using examples of how you have developed customer relationships by overcoming problems.
- Case histories which describe situations you have dealt with when there was a conflict between the needs of your customer and your organisation.
- Copies of records which show customers' loyalty as a result of your own efforts.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal and external to the organisation or a combination of both.