

U13402 Promote additional products or services to customers

Unit Descriptor:

If you have chosen this unit your job must involve opportunities to encourage customers to use more of your organisation's products or services.

Products or services are continually changing in organisations to keep up with customers' needs and expectations and your organisation must promote these to be able to survive in a competitive marketplace.

Also, your customers will expect more and more products or services to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation to give them a greater choice.

Because of this everybody delivering products or services needs to play a part in making customers aware of what is available as well as encouraging them to come back for more.

This unit deals with the way you promote products or services to your customers to extend their use of your organisation.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

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| 1. Identify additional products or services that are available | 1.1 Work with others to keep your information regarding your organisation's products or services up to date.

1.2 Check with others when you are unsure of new product or service details.

1.3 Identify appropriate products or services that may match individual customers needs.

1.4 Spot opportunities for offering customers additional products or services that might improve their customer experience. |
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| 2. Inform customers about additional products or services | 2.1 | Choose the most appropriate time to inform your customers about additional products or services . |
| | 2.2 | Choose the most appropriate method of communication to introduce your customers to additional products or services. |
| | 2.3 | Give your customers accurate and sufficient information to enable them to make a decision about the additional products or services. |
| | 2.4 | Give your customers the time to ask questions about the additional products or services and respond with appropriate and accurate information. |
| 3. Gain customer commitment to using additional products or services | 3.1 | Close the discussion appropriately if your customers show no interest. |
| | 3.2 | Give relevant information to move the situation forward when your customers show interest. |
| | 3.3 | Secure customer agreement and check customer understanding regarding the delivery of the product or service. |
| | 3.4 | Take action to ensure prompt delivery of the additional products or services to your customers by your organisation. |
| | 3.5 | Refer your customers to others or to alternative sources of information if the additional products or services are not ones you are responsible to deal with. |

RANGE STATEMENT

You must cover the items below;

Element 1: Identify additional products or services that are available

A. Additional products or services: (*Also applies to Elements 2 and 3*)

- (i) use of products or services which are new to your customer
- (ii) more use of the same products or services your customer has used before

Element 2: Inform customers about additional products or services

A. Information:

- (i) verbal
- (ii) written

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.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

UNDERPINNING KNOWLEDGE AND SKILLS (continued)**Additional underpinning knowledge and skills you will need for Unit 8**

10. What are the organisational procedures and systems for encouraging the use of additional products or services.
11. How would the use of additional products or services benefit your customers.
12. How would the customers' use of additional products or services benefit your organisation.
13. What are the main factors that influence customers to use your products or services.
14. How would you introduce additional products or services to customers outlining their benefits, overcoming reservations and agreeing to provide the additional products or services.
15. How would you give appropriate, balanced information to customers about products or services.

EVIDENCE GUIDE

For assessment purposes:

1. Critical Aspects of Evidence

The additional products or services you offer **must** include:

- a. use of products or services which are new to your customer
- b. more use of the same products or services your customer has used before

You must prove that you:

- c. regularly follow agreed organisational procedures for offering additional products or services to your customers
- d. create your own opportunities for encouraging your customers to use additional products or services
- e. identify what your customer wants by seeking information directly and by collecting information from spontaneous customer comments

The information you provide to your customers may be given verbally or in writing.

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

2. Methods of Assessment

The products or services outside of your own area of responsibility may include: those offered by other sections of your organisation; or products or services that you have not supplied before.

Performance Evidence for this unit could include:

- Observation reports from your assessor recording how you have been able to appropriately inform customers of additional products or services.
- Witness testimony from an appropriate person which provides evidence that you are able to secure a customer's commitment to use additional products or services.

Supplementary Evidence for this unit could include:

- Case histories which describe situations where you have been able to gain the commitment of customers to use products or services they had not used before.
- Copies of reports or transaction statistics which show how you have contributed to the additional use of products and services by your customers.

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 or external to the organisation or a combination of both.