

U01702: Operate organisational systems on behalf of customers

Unit Descriptor:

This unit describes the competence required to ensure efficient operation of organisational systems on behalf of customers.

The unit describes the essential abilities of:

- Responding to customer needs
- Communicating effectively
- Solving problems
- Keeping records
- Operating within organizational procedures
- Meeting legal requirements

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

1. Record and store information	1.1 Information recorded is up-to-date, accurate, complete and legible. 1.2 Recorded information is maintained in good condition and stored in the correct location. 1.3 Information of a confidential nature is accessible only to authorized persons. 1.4 Unexpected situations are dealt with effectively and the appropriate persons informed where necessary. 1.5 All work is carried out in an organized and efficient manner in accordance with legal requirements and organizational procedures.
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| 2. Deliver products or services to customers | 2.1 Products or services of the organization are promptly supplied in keeping with the organisation's policy. |
| | 2.2 Other products or services are suggested to meet customer's needs. |
| | 2.3 Customer product or service needs are explored through sensitive questioning. |
| | 2.4 Own knowledge of products or services and processes is continually updated by using information from within the organization. |
| | 2.5 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary. |
| | 2.6 All work is carried out in an organized and efficient manner in accordance with legal requirements and organizational procedures. |
| 3. Maintain service when systems go wrong | 3.1 Apologies for failure in service are offered immediately to the customer and reasons for failure explained in keeping with the organisation's policy. |
| | 3.2 Customers are kept updated about interruptions in service. |
| | 3.3 Information given to customers is designed to protect from unnecessary worry. |
| | 3.4 Service is maintained through unprompted extra efforts. |
| | 3.5 Practical help is offered to colleagues to maintain service to customers when systems go wrong. |
| | 3.6 Unexpected situations are dealt with effectively and the appropriate persons informed where necessary. |

- 3.7 All work is carried out in an organized and efficient manner in accordance with legal requirements and organizational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Record and store information

A. Information:

- (i) verbal
- (ii) written

B. Information supplied to and provided by:

- (i) line managers
- (ii) colleagues
- (iii) customers

C. Information:

- (i) personnel matters
- (ii) service provision
- (iii) health and safety

D. Legal:

- (i) current relevant legislation relating to recording and storing information and safe and hygienic working practices

Element 2: Deliver products or services to customers

E. Customer product or service needs:

- (i) stated products or services
- (ii) unstated products or services

F. Information:

- (i) from colleagues
- (ii) from storage
- (iii) systems
- (iv) from training materials

G. Legal:

- (i) current relevant legislation relating to delivering products or services to customers and safe and hygienic working practices

Element 3: Maintain service when systems go wrong

H. Information:

- (i) generated by own duties or responsibilities
- (ii) generated by others inside the organisation

I. Legal:

- (i) current relevant legislation relating to when systems go wrong and safe and hygienic working practices.

UNDERPINNING KNOWLEDGE AND SKILLS**Organizational policies and procedures**

1. What the recording and storing requirements and procedures are.
2. What constitutes confidential information, the reason why confidentiality must be maintained, and the possible consequences of failing to maintain confidentiality.
3. Who is authorized to access confidential information.

Product knowledge

4. What are the relevant products and services provided by the organisation.
5. What are the procedures and policies relating to products and services.

Communication

6. What questioning and listening techniques can be used.
7. How communication channels relating to systems can go wrong.

Legislation

8. What the customer's legal rights are.
9. What the statutory obligations in relation to emergencies and service failure are.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

You must provide evidence that shows you have met the performance criteria over a significant period of time for your assessor to consider that you are competent.

- Totally through performance evidence in the form of observation and products of work or by performance evidence in the form of observation and products of work.
- By **performance evidence 1.1 -1.2** and a minimum of both from the range of A and **two (2)** from the range of B.
- By performance evidence to cover **performance criteria 2.1 – 2.3** and **all** from the range of E.
- By performance evidence to cover **performance criteria 3.1 -3.5** and **all** from the range of H.
- Supplementary evidence in the form of questioning and/or role-play and/or witness testimony to order the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be addressed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by assessors of how you:
 - o record and store information
 - o deliver products or services to customers
 - o maintain service when systems go wrong
- Copies of written communication to and from customers.
- Photographs of yourself at work
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statement from customers, colleagues, line managers that provides evidence of how you:
 - o record and store information
 - o deliver products or services to customers
 - o maintain service when systems go wrong

- A personal statement describing how you:
 - record and store information
 - deliver products or services to customers
 - maintain service when systems go wrong

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.