

Housing Occupational Standards

H3 11 Provide housing advice and guidance to customers (SQA Unit Code F7DF 04)

Unit summary

This unit is for you if you are involved in providing housing advice and guidance to customers. This includes advice on rights and responsibilities, directing customers to other sources of support and handling complaints.

Performance criteria

You must be able to:

- 1 develop positive relationships with customers
- 2 communicate in a manner which promotes confidence, goodwill and trust
- 3 promote and explain the services and support provided by your organisation
- 4 establish and respond to customers' specific needs, and offer the appropriate level of advice, guidance, and support
- 5 advise customers of their rights and responsibilities, including their right to complain or appeal
- 6 ensure that information and guidance provided to customers is accurate and reflects organisational policy
- 7 explore possible options and actions with customers
- 8 support customers in making complaints or appeals
- 9 ensure that your communication with the customer regarding complaints or appeals is conducted in a polite and professional manner
- 10 record and action complaints and appeals accurately, and in accordance with your organisational procedures and any legal requirements
- 11 promptly refer requests, complaints or appeals which are outside the limits of your role to colleagues or to other agencies able to help
- 12 ensure confidentiality of information in line with legal and organisational requirements

Knowledge and understanding

To be competent, you must know and understand:

- (a) the organisational policy on developing and maintaining effective relationships with customers
- (b) the range and needs of customers likely to be encountered
- (c) the range and essential features of services and support available, and how these relate to customer requirements
- (d) how to identify customer needs
- (e) how operational constraints impact on service provision
- (f) the limits of your own responsibilities and the consequences of operating outside these limits
- (g) the communication processes and procedures within your organisation
- (h) the importance of effective communication and the implications of not communicating effectively
- (i) the importance of good customer relations, and the consequences of failing to develop and maintain good customer relations
- (j) why information must be relevant, accurate and up to date
- (k) the most appropriate manner in which to present or explain information
- (l) what to do when sufficient information to meet the customers' needs is not immediately available
- (m) the types of customer requests or complaints that must be referred to colleagues or other agencies
- (n) the importance of prompt referrals and informing the customer of such action
- (o) how and why the confidentiality of information should be maintained
- (p) your organisational complaints and appeals procedures and the consequences of not following procedures

- (q) why accurate and complete documentation is important, and the possible consequences of incorrect completion