

Overview

This standard is for people who are required to develop and maintain positive relationships with clients and customers associated with installation and/or maintenance activities in the building services engineering sector in accordance with appropriate industry standards and regulations, the specification, working practices, the working environment and the natural environment

This standard is appropriate to the air conditioning, electrotechnical, consumer electrical and electronic products, heating & ventilating, plumbing, and refrigeration, industries.

The person undertaking the responsibility for establishing and maintaining client and customer relationships must be able to:

- present and provide accurate technical and functional information, advice and guidance
- liaise with clients and customers with respect to their needs and expectations
- respond as appropriate to client and customer needs and expectations

Please note that industry specific terminology is identified by *italic* text and its explanation and/or meaning can be found in the glossary of this standard.

**Performance
criteria**

To carry out this work in accordance with the current versions of *the appropriate industry standards and regulations, the specification, working practices, the working environment and the natural environment*

- You must be able to:**
- P1 identify the *clients and customers* that need to be supplied with technical and functional information
 - P2 obtain the current and relevant technical and functional information that needs to be provided to the *clients and customers*
 - P3 provide accurate guidance and advice to the *clients and customers* on technical and functional matters associated with the *building services engineering system* that has been installed and/or maintained in terms of:
 - P3.1 health and safety issues
 - P3.2 safe and effective operation
 - P4 provide information in accordance with **organisational procedures**
 - P5 demonstrate to the *clients and customers*, as appropriate, the operation of the *building services engineering system* that has been installed and/or maintained
 - P6 confirm in relation to the installation and/or maintenance activity:
 - P6.1 the *client and customer* expectations and requirements
 - P6.2 the *building services engineering system* is in a satisfactory condition
 - P6.3 the hand over process
 - P7 establish and maintain productive working relationships with *clients and customers*, including dealing with disagreements in an amicable and constructive way, so that good relationships are maintained
 - P8 respond effectively to requests for technical and functional information from *clients and customers*
 - P9 report, record and recommend, in accordance with **organisational procedures** and as appropriate, any variation to the installation and/or maintenance activity to the *clients, customers* and other **relevant people**
 - P10 comply with organisational standards for appearance and behaviour

SUMBSE02

Establish and maintain relationships in the building services engineering sector (SQA Unit Code-H94Y 04)



Knowledge and understanding

To carry out this work in accordance with the current versions of *the appropriate industry standards and regulations, the specification, working practices, the working environment and the natural environment*

You need to know and understand:

- K1 the importance of customer service in relation to installation and/or maintenance activity
- K2 how to identify the *clients and customers* that need to be supplied with technical and functional information
- K3 sources of technical and functional information such as:
 - K3.1 the *specification* for the *building services engineering system*
 - K3.2 the *specification* for the installation and/or maintenance activity
 - K3.3 the manufacturer's instructions
- K4 the responsibilities and limitations of your job role with respect to supplying technical and functional information
- K5 the technical and functional information that you are providing and its implications on the operation of the *building services engineering system* and/or its equipment, accessories and components that have been installed and/or maintained
- K6 the **organisational procedures** and policies regarding the handover and demonstration of an *building services engineering system* and/or its equipment, accessories and components that have been installed and/or maintained
- K7 the operating principles, controls and settings of the *building services engineering system* and/or its equipment, accessories and components that have been installed and/or maintained importance of providing technical and functional information clearly, courteously and professionally
- K8 the methods and **organisational procedures** for establishing positive relations with *clients and customers*
- K9 the working requirements and practices of the *clients and customers* in the **working environment** where the installation and/or maintenance activity is taking place
- K10 which situations warrant written technical and functional information
- K11 the safety implications and operational consequences of supplying inaccurate or incomplete technical and functional information to *clients and customers*
- K12 methods of checking the *clients' and customers'* understanding of the technical

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- and functional information provided
- K13 legislation regarding health and safety, data protection, equal opportunities and regulations that affect the way that technical and functional information is delivered to *clients and customers*
 - K14 the *clients' and customers'* rights including any contractual agreements

Additional information

Scope related to performance criteria

The contexts and circumstances below identify where and when the NOS could apply.

1 Working environments (internal and/or external)

- 1.1 commercial
- 1.2 industrial
- 1.3 domestic
- 1.4 agricultural
- 1.5 horticultural
- 1.6 leisure and entertainment
- 1.7 residential medical and care facilities
- 1.8 public highways and parks
- 1.9 public services establishments
- 1.10 pre 1919 traditional/historic buildings

2 Organisation procedures

- 2.1 information management
- 2.2 method statement
- 2.3 project management
- 2.4 risk assessment
- 2.5 risk management
- 2.6 implementing and monitoring health and safety requirements and issues
- 2.7 implementing and monitoring issues relating to the *natural environment*
- 2.8 customer services
- 2.9 accident reporting
- 2.10 emergencies
- 2.11 communication with relevant people

**Range related to
performance criteria**

The contexts and circumstances below identify where and when the NOS must apply

1 Relevant people

1.1 *customers/clients*

1.2 client representatives

1.3 supervisors

1.4 site/contract manager

1.5 other contractors/trades

1.6 members of the public

1.7 work colleagues

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Glossary

Building services engineering system

A system that is installed externally or internally to provide climate/environmental control, communication, heating, lighting, operational/process control, power, refrigeration, security or water for a building or structure and/or appliances, equipment and machines therein.

Appropriate industry standards and regulations for:

- electricity at work
- the quality of buildings and building work in England, Northern Ireland, Scotland and Wales
- requirements for electrical installations
- electricity safety, quality and continuity
- working at heights
- managing health and safety at work
- workplace health and safety and welfare
- personal protection at work
- provision and use of work equipment
- manual handling operations
- construction design and management
- controlling noise at work
- controlling asbestos in the work place
- controlling substances hazardous to health
- recycling and disposal of waste electrical and electronic equipment

Specification

A verbal and/or documented instruction that is an explicit set of requirements for installing, maintaining and/or servicing identified systems, equipment or products, to be satisfied by materials, components, design, processes, procedures, data management and/or service(s).

Clients and customers

- purchaser of installation and/or maintenance services
- other trades and services at the work site
- colleagues within the same organisation
- architect
- contract manager
- main/sub-contractor
- consultant
- local authority representatives
- work colleagues

Natural environment

The climate, weather and natural resources that effect and are affected by human life and economic activity

Working practices

Methods, techniques and procedures that are adopted for carrying out specific tasks that ensures workers' exposure to hazardous situations is controlled in a safe manner when:

- working with equipment, tools and plant
- working with materials and substances (hazardous and non-hazardous)
- manual handling lifting
- using lifting equipment
- using personal protective equipment (PPE)

A **public services establishment** can be a:

- hospital/medical centre
- school/college/university
- museum/library
- prison
- military base
- car park
- church or other place of worship

External Links

Links correct at time of NOS approval:

- Health & Safety Executive Documents <http://www.hse.gov.uk/pubns>
- The quality of buildings and building work in England
<https://www.gov.uk/government/policies/providing-effective-building-regulations-so-that-new-and-altered-buildings-are-safe-accessible-and-efficient>
- The quality of buildings and building work in Wales
<http://wales.gov.uk/topics/planning/buildingregs/?lang=en>
- The quality of buildings and building work in Northern Ireland
<http://www.dfpni.gov.uk/building-regulations>
- The quality of buildings and building work in Scotland
<http://www.scotland.gov.uk/Topics/Built-Environment/Building/Building-standards>
- British Standard 7671 – Requirements for Electrical Installations
<http://www.theiet.org/resources/wiring-regulations/>
- Carriage of dangerous goods authorisations
<https://www.gov.uk/government/publications/carriage-of-dangerous-goods-authorisations>
- The requirements and information on microgeneration
<https://www.gov.uk/government/publications/microgeneration-strategy>

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| Status | Original draft |
| Originating organisation | SummitSkills |
| Original URN | EL3/4; M3/4 |
| Relevant occupations | Highway Electrical Systems Installer; Installation Electrician; Maintenance Electrician; Air Conditioning Installation Engineer; Air Conditioning Service and Maintenance Engineer; Electrical Trades; Electrician; H&V Ductwork Erector; H&V Ductwork Installer; H&V Pipe Fitter/Welder; Heating and Ventilating Pipework Installation Operative; Heating and Ventilating Ductwork Installer; Heating and Ventilating Service and Maintenance Operative; Heating and Ventilating Welder; Highway Electrical Systems Commissioning Electrician; Highway Electrical Systems Service & Maintenance Electrician; Plumbers; Refrigeration Operative; Heating and Ventilation Service and Maintenance Engineer; Heating and Ventilation Industrial and Commercial Systems Engineer; Refrigeration Engineer |
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