

# CFACSB11 (SQA Unit Code – H9Y5 04)

## Improve the customer relationship



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### Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

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### Performance criteria

#### Improve communication with your customers

- You must be able to:*
- P1 select and use the best method of communication to meet your customers' expectations
  - P2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
  - P3 adapt your communication to respond to individual customers' feelings
  - P4 monitor information about your interaction with customers using all available information channels

#### Balance the needs of your customer and your organisation

- You must be able to:*
- P5 meet your customers' expectations within your organisation's service offer
  - P6 explain the reasons to your customers sensitively and positively when their expectations cannot be met
  - P7 identify alternative solutions for your customers either within or outside the organisation
  - P8 identify the costs and benefits of these solutions to your organisation and to your customers
  - P9 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
  - P10 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

#### Exceed customer expectations to develop the relationship

- You must be able to:*
- P11 make extra efforts to improve your relationship with your customers
  - P12 recognise opportunities to exceed your customers' expectations
  - P13 take action to exceed your customers' expectations within the limits of your own authority
  - P14 gain the help and support of others to exceed your customers' expectations

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#### Knowledge and understanding

*You need to know and understand:*

- K1 how to make best use of the method of communication chosen for dealing with your customers
- K2 how to negotiate effectively with your customers
- K3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- K4 the importance of customer loyalty and/or improved internal customer relationships to your organisation
- K5 how to monitor information about your interaction with customers from every available source including internet communication channels and social media platforms

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### SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website [www.sqa.org.uk](http://www.sqa.org.uk)

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**Relevant occupations** Customer Service Occupations

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**Suite**

Customer Service (2013)

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**Key words**

Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; work with others; giving Information; teamwork