

## CFACSA15 (SQA Unit Code – FE2X 04) Organise the promotion of additional services or products to customers



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### Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is about expanding and extending the relationship with your customers by persuading them to make use of additional services or products that you can offer. Your services or products will remain viable only if they are used by customers. The Standard covers the way you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively. It is also about monitoring your successes and failures and recognising the best way to approach your customers with additional services or products in the future. You need to show that you are promoting the services or products by encouraging more people to use them.

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#### Performance criteria

#### Offer additional services or products

*You must be able to:*

- P1 offer additional services or products to your customers
- P2 identify the benefits of offering additional services or products for your customers and the organisation
- P3 explain the features and benefits of additional services or products to your customers
- P4 identify ways of encouraging customers to ask about additional services or products

#### Organise support to promote use of additional services or products

*You must be able to:*

- P5 discuss with others ways of promoting additional services or products to your customers
- P6 implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- P7 promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
- P8 help customers to access services or products which are supplied outside of your own area of the organisation

#### Monitor the promotion of additional services or products

*You must be able to:*

- P9 devise methods to inform customers about additional services or products
- P10 use different methods to inform customers about additional services or products and record successes and failures against each method
- P11 use your record of successes and failures to identify the best approach for offering additional services or products
- P12 share information with others regarding the best approach to take when offering additional services or products to your customers

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#### Knowledge and understanding

*You need to know and understand:*

- K1 your organisation's procedures and systems for encouraging the use of additional services or products
- K2 how the use of additional services or products will benefit your customers
- K3 the main factors that influence customers to use your services or products
- K4 how to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- K5 how to give appropriate, balanced information to your customers about services or products
- K6 the importance of the influence of others when your customer is making decisions about additional services or products

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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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**Originating organisation** Skills CFA

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**Original URN** CFACSA15

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**Relevant occupations** Customer Service Occupations

## **CFACSA15 (SQA Unit Code – FE2X 04)**

### **Organise the promotion of additional services or products to customers**

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**Suite**

Customer Service (2013)

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**Key words**

Promoting; services; products; additional; organise; delivery; customer service; communication; problem solving; behaviours; work with others; team work