

CFACSB15 (SQA Unit Code – H9Y8 04)

Build and maintain effective customer relations



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.

Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help your organisation to identify and understand your customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This Standard is about establishing and maintaining effective customer relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to your organisation's success. This Standard is for you only if you are in a position to influence the way your organisation determines the level of service offered to different customers.

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Performance criteria

Establish effective customer relations

- You must be able to:*
- P1 identify the types of customers with whom you should build longer term customer relations and promote loyalty
 - P2 communicate with these customers so that they know they are important to your organisation
 - P3 explain your role, the purpose of making contact and the mutual benefits of building a longer term relationship with customers
 - P4 make it clear that you welcome two-way communication about customer expectations

Maintain and develop effective customer relations

- You must be able to:*
- P5 keep customers informed and accept criticism from customers openly and constructively
 - P6 regularly assess whether customer expectations are being consistently met
 - P7 use your influence and authority in your own organisation to ensure that customer needs and expectations are being met and, where possible, exceeded
 - P8 collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction
 - P9 analyse customer relations and propose changes that will develop longer term loyalty to people with authority in your organisation

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Knowledge and understanding

You need to know and understand:

- K1 how to identify and prioritise types of customers with whom you should be building a longer term relationship
- K2 the most appropriate method of establishing relationships with customers targeted for longer term relationships
- K3 the importance of effective communication skills when dealing with customers
- K4 how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship
- K5 how to communicate with customers, especially when they are dissatisfied with services or products
- K6 how to negotiate with customers in a way that balances their expectations with the expectations of your organisation
- K7 the types of compromises that would be acceptable to your organisation when meeting customer expectations
- K8 how to use your influence and authority in your organisation to meet or exceed customer expectations
- K9 methods of monitoring customer satisfaction appropriate to your level of authority in the organisation
- K10 the part played by internet contact and social media and the potential this offers for building and maintaining effective customer relations

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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

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Developed by Skills CFA

Version number 2

Date approved January 2013

Indicative review date January 2016

Validity Current

Status Original

Originating organisation Skills CFA

Original URN CFACSB15

Relevant occupations Customer Service Occupations

Suite Customer Service (2013)

Key words Customer relationships; building relationships; loyalty; influence; customer service; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products
