

Prepare customer accounts and deal with departures

Overview

This standard is about maintaining customer accounts by entering charges and adjustments onto the account. It also covers dealing with departing customers by completing the relevant documentation and procedures, and recording customer comments.

This standard is for members of staff that have responsibility for checking out customers. The customer experience starts when they arrive and finishes when they leave. The final part is as important as the start even if their stay has been outstanding in all other areas. Customers expect the account to be accurate and the whole procedure to be as smooth and efficient as possible.

When you have completed this standard, you will be able to demonstrate your understanding of and your ability to:

- Prepare customer accounts and deal with departures

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Performance criteria

You must be able to:

Prepare and maintain customer accounts

1. Enter charges regularly and accurately against customer accounts in the account system
2. Record any account adjustments accurately against customer accounts
3. File and store account documents correctly at all times
4. Complete customer accounts for the customer
5. Follow organisational confidentiality procedures when dealing customers' accounts

Deal with the departure of customers

6. Greet and deal with customers in a polite, welcoming and efficient way
7. Prepare documents and other necessary items before the customer departs
8. Present the account to the customer for confirmation
9. Check customer account details and request payment as required
10. Complete documentation and deal with it using the correct account or booking system
11. Complete all other organisational procedures for customer departures
12. Record customer comments, complaints and suggestions and feed them back to the appropriate person or department
13. Promote establishment services and facilities as appropriate
14. Offer to deal with and organise any future booking requirements
15. Wish the customer a pleasant onward journey in a way that projects a positive and polite image once all the departure procedures have been completed

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Knowledge and understanding

You need to know and understand:

For the whole unit

1. Your organisation's standards for customer care, and why it is important to follow these
2. Basic legal requirements relating to preparing and maintaining customer accounts
3. Your organisation's procedures for customer accounts, and why it is important to follow these

Prepare and maintain customer accounts

4. Why customer accounts must be updated regularly with charges and adjustments
5. Why it is important to give accurate verbal and written information to customers
6. Why customer accounts must be secured from unauthorised access
7. The types of unexpected situations and problems that may occur with customer accounts, and how to deal with these correctly

Deal with the departure of customers

8. Basic legal requirements relating to accommodation, goods and services for sale
9. Safe and hygienic working practices when dealing with the departure of customers
10. Your organisation's procedures for customer departures
11. Why complaints, comments and suggestions should be recorded and fed back to the appropriate person / department
12. Why details of any extra charges should be available to the customer
13. The types of unexpected situations and problems that may occur with customer departures and how to deal with these correctly
14. Opportunities to promote the organisation when the customer is leaving

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Scope/range

1. Account or booking systems

- 1.1 computerised
- 1.2 manual
- 1.3 online

2. Account adjustments

- 2.1 charges
- 2.2 allowances / discounts
- 2.3 refunds
- 2.4 deposits / pre-payments
- 2.5 transfers

3. Customer accounts

- 3.1 those where part payment is required
- 3.2 those where full payment is required
- 3.3 those where the account does not require immediate settlement

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Relevant Occupations Receptionist

Suite Hospitality - Housekeeping and Front of House Reception

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