



<b>Unit title</b>	Develop Professional Relationships Through Collaboration to Meet Customer Needs and Business Objectives
<b>SQA code</b>	J5VH 46
<b>SCQF level</b>	6
<b>SCQF credit points</b>	7

## History of changes

**Publication date:** November 2021

**Version:** 1

<b>Version number</b>	<b>Date</b>	<b>Description</b>

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Unit template: October 2021

<b>SSC code:</b>	CSFSS4	
<b>Learning outcomes</b>	<b>Assessment criteria</b>	
<b>Unit purpose (aims)</b>		
The aim of this unit is for learners to demonstrate they can develop positive professional working relationships with customers (internal and external) and colleagues by effectively collaborating, to meet customer needs and business objectives.		
<b>The learner will</b>	<b>The learner can</b>	
1 Work with colleagues to meet customer needs and business objectives	1.1	Apply organisational regulations, ethical standards, and codes of conduct, including standards of behaviour and performance expected.
	1.2	Articulate the organisation's business objectives including those relating to own area of work.
	1.3	Explain the range of products and services offered by the organisation.
	1.4	Explain the organisation's approaches to identifying customer needs and the benefits of this.
	1.5	Consult with customers to identify their needs.
	1.6	Explain the roles and responsibilities of colleagues and their importance and impact on own area of work.
	1.7	Explain own and colleagues' roles and responsibilities required to meet customer needs and business objectives.
	1.8	Explain own and team objectives and targets, how these are set, measured and why they are important.
	1.9	Share best practice with colleagues to meet customer needs and business objectives.
2 Develop and maintain professional working relationships with customers and colleagues to support the delivery of high-quality services	2.1	Establish professional working relationships with customers and colleagues.
	2.2	Explain how interpersonal and communication skills can be used to build rapport and trust.
	2.3	Manage challenging behaviour from customers.
	2.4	Explain the importance of showing empathy when dealing with customers and colleagues and appropriate ways to do so.
	2.5	Demonstrate a solution focussed approach to resolve issues to help customers and colleagues.
	2.6	Gather and act on constructive feedback from customers and colleagues.
	2.7	Explain the benefits of developing productive working relationships with colleagues.
	2.8	Contribute to a culture of trust and mutual respect.
3 Review and feedback on team performance to improve efficiency and effectiveness of service delivery	3.1	Review service performance.
	3.2	Explain the different ways of documenting and communicating the outcomes of customer interactions.
	3.3	Gather, analyse and document customer interactions and feedback.
	3.4	Obtain and interpret relevant information to measure achievement of team objectives and targets.
	3.5	Identify and take action, with colleagues, to improve customer service performance.
	3.6	Explain the methods of providing feedback, advice and support to colleagues and the importance of this.

	3.7	Provide constructive feedback to colleagues to support them to learn new skills and improve performance.
	3.8	Monitor and communicate how the agreed actions taken have improved the quality of service delivery.
4 Reflect on your own performance to improve efficiency and effectiveness of service delivery	4.1	Obtain and interpret relevant information to measure achievement of own objectives and targets.
	4.2	Reflect on feedback from customers and colleagues to develop own skills and performance.
	4.3	Explain the importance of taking action to improve own performance.
	4.4	Explain the methods used to celebrate success and acknowledge achievements and the benefits of this.

### Meta-skills

Across this unit there are opportunities to develop and apply a range of meta-skills. An indicative range of these skills are highlighted (\*) in the following table:

<b>Self-management</b>	focusing	integrity*	adapting*	initiative*
<b>Social intelligence</b>	communicating*	feeling*	collaborating*	leading
<b>Innovation</b>	curiosity*	creativity	sense-making*	critical thinking*

### Assessment (evidence) requirements

This unit is designed to recognise competence in aspects of delivery of customer service in the Financial Services sector. It therefore requires that the learner is engaged in a customer service role within the Financial Services sector and that assessment evidence is generated in the workplace.

Simulation may be undertaken only when the learner is unable to provide sufficient evidence of workplace performance to complete the unit and/or where there is a potential risk to the learner or others. This may arise from considerations of safety, legislation, regulation, contingency or cost. Any use of simulation to provide performance evidence (and support assessment) should be agreed in advance by the assessor and learner at the assessment planning stage. Those involved in the assessment process must be satisfied that the use of simulation does not compromise the rigour and integrity of assessment. Where simulation is used to generate evidence of competence, this should not be used as the sole source of evidence for the unit. Other sources and types of evidence will need to be generated to corroborate the evidence derived from simulation. In all cases, simulation must take place in a Realistic Work Environment (RWE) which re-creates the environment, equipment and time pressures found in a typical work environment.

### Guidance on instruments of assessment

This unit forms part of the **Customer Service in the Financial Services Sector at SCQF level 6** qualification. It is recommended that learners undertaking this qualification develop a portfolio of work to evidence their competence that includes:

- ◆ direct observation
- ◆ expert witness testimony
- ◆ product evidence
- ◆ regular reflective practice supported by professional discussion.

A key aspect of this qualification is the expectation that learners develop meta-skills and that they become aware of the importance of these skills — both in the provision of effective customer service, and for their personal and career development.

To support this, each unit in this qualification signposts meta-skills that are likely to be required or demonstrated in order to meet the outcomes, and each unit also requires that learners reflect on the skills, including meta-skills, that they have developed or demonstrated through achieving the unit.

Holistic approaches to assessment are encouraged so that larger pieces of work are used to evidence a number of learning outcomes rather than a piecemeal process of finding separate evidence for each outcome or assessment criteria. As an example, the “Support Continuous Improvement in the Financial Services Sector” (unit J5VJ 46) is an activity which is often undertaken by cross team project groups and which is likely to provide assessment evidence both for other units and for meta-skills as skills such as collaboration, leadership, communication, sense-making and creativity are all likely to contribute to effective improvement.

It is unlikely however that performance evidence alone will provide complete evidence of competence in this unit. In particular, where the learner’s knowledge and understanding is not apparent from performance evidence, it must be assessed by other methods and be supported by suitable evidence. Knowledge and understanding can be demonstrated in a number of different ways, but it is suggested that the most appropriate methods for this unit are oral questioning, professional discussion and reflective accounts. Assessors should ask enough questions to be able to determine that the learner has an appropriate level of knowledge and understanding as required by the unit(s).

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.

**Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

This unit is based on the occupation profile developed for the Scottish Apprenticeship in Providing Financial Services at SCQF level 6 and aligns to the NOS INSCS002, INSCS004 and INSCS015 developed by Instructus