

Unit D3XB 04 (2GEN1)

**Give customers a positive impression of yourself
and your organisation**

This Unit has the following elements:

Element 1 (2GEN1.1)	Establish effective relationships with customers
Element 2 (2GEN1.2)	Respond appropriately to customers
Element 3 (2GEN1.3)	Communicate information to customers

Candidate Name:

Assessment Centre:

I have completed the requirements of this Unit.

Candidate signature: _____ Date: _____

I can confirm the candidate has completed all requirements of this Unit.

Assessor signature: _____ Date: _____

Assessor counter signature:
(where applicable) _____ Date: _____

IV signature: _____ Date: _____

IV counter signature:
(where applicable) _____ Date: _____

Unit D3XB 04 (2GEN1)

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Unit Summary

Excellent customer service is provided by people who are good with people.

Your behaviour affects the impression that customers form of the service they are receiving. This Unit is all about communicating with customers and giving a positive impression of yourself whenever you deal with a customer. By doing this you will also be giving a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, respond to us and give us good information. Every detail of your behaviour when dealing with a customer counts and this Unit gives you the opportunity to prove that you can create that positive impression.

This Unit is the same as the Institute of Customer Service Unit 1, level 2.

The typical day-to-day activities you might carry out for this Unit include:

- ◆ meeting and greeting customers
- ◆ communicating with customers
- ◆ finding out what your customers' needs are
- ◆ dealing with customers' questions

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Evidence Requirements for the Unit

Simulation is not allowed for any performance evidence within this Unit. You must supply all the evidence from work you have carried out with customers in your workplace. Your customers can be internal or external to the organisation or a combination of both.

You must prove that you have worked to give your customers a positive impression of yourself.

You must produce evidence that shows you have done this over a period of time with different customers on different occasions.

As well as creating a positive impression with customers during routine delivery of customer service, you need to include evidence which relates to:

- ◆ very busy periods
- ◆ quiet periods
- ◆ periods when you are working under pressure

You also need to show that you have dealt with customers who:

- ◆ have different needs and expectations
- ◆ appear angry
- ◆ may be confused

Your evidence must show that you respond to customers within the guidelines of your organisation.

Your communication with customers may be face to face, by letter, fax, telephone, e-mail, internet, intranet or any other method you would be expected to use within your job role.

You must prove that you communicate with customers effectively by providing evidence that you:

- ◆ use appropriate spoken or written language
- ◆ apply the rules and procedures suitable for the method of communication you have chosen

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation****Element 1 (2GEN1.1)****Establish effective relationships with customers**

What you must do		Assessor initials/date
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Meet your organisation's standards for appearance and behaviour	
2	Greet your customers in a way that is appropriate to their needs	
3	Communicate with your customers in a way that makes them feel valued and respected	
4	Identify and confirm the needs and expectations of your customers	
5	Treat your customers courteously and helpfully even when you are working under pressure	
6	Maintain communication with your customers to ensure that they are kept informed and reassured	
7	Adapt your behaviour to respond effectively to different customer behaviour	

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Element 1 (2GEN1.1)

Establish effective relationships with customers

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation****Element 2 (2GEN1.2)****Respond appropriately to customers**

What you must do		Assessor initials/date
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Respond appropriately to customers who indicate that they need or want your attention	
2	Select an appropriate way of communicating with your customers to suit their individual needs	
3	Respond promptly and positively to your customers' questions and comments	
4	Allow your customers time to consider your response and give further explanation when appropriate	
5	Check with your customers that you have fully understood their needs and expectations	

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation****Element 2 (2GEN1.2)****Respond appropriately to customers**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation****Element 3 (2GEN1.3)****Communicate information to customers**

What you must do		Assessor initials/date
Evidence should be gathered through observation, products of work, projects, questioning, work-based assignments, and expert witness testimony		
1	Quickly locate information that will help your customer	
2	Give your customers the information they need about the products or services offered by your organisation	
3	Recognise information that your customers might find complicated and check whether they fully understand	
4	Explain clearly to your customers any reasons why their needs or expectations cannot be met	

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation****Element 3 (2GEN1.3)****Communicate information to customers**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation**

What you must know for the Unit	
For the whole Unit	
K1	What your customers' rights are and how these rights limit what you are able to do for your customer
K2	The specific aspects of health and safety, data protection, equal opportunities, disability discrimination and legislation and regulations that affect the way the products or services you deal with can be delivered to your customers
K3	Industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers
K4	Any contractual agreements that your customers have with your organisation
K5	The products or services of your organisation relevant to your customer service role
K6	The guidelines laid down by your organisation that limit what you can do within your job
K7	The limits of your own authority and when you need to seek agreement with or permission from others
K8	Any organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met
K9	How to communicate in a clear, polite, confident way and why this is important
K10	Your organisation's standards for appearance and behaviour
K11	Your organisation's guidelines for recognising customers' needs and expectations and responding positively to them
K12	The rules and procedures regarding the methods of communication you use
K13	How to recognise when a customer is angry and confused

Knowledge evidence retained

Assessor signature: _____

Date: _____

Unit D3XB 04 (2GEN1)**Give customers a positive impression of yourself and your organisation**

Candidate name:		Assessor initials/date
Ref	Supplementary evidence	
A		
B		
C		
D		
E		
F		
G		
H		

Assessor Feedback