

Level 2 Certificate in Property (4401-21/22)

October 2017 Version 2.3



Qualification at a glance

Subject area	Property
City & Guilds number	4401
Age group approved	16+
Assessment	By portfolio
Fast track	Not Available – full qualification approval must be sought
Support materials	Handbook
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	GLH	TQT	City & Guilds number	Accreditation number
Level 2 Certificate in Property (Sale of Residential Property)	81	180	4401-21	600/1192/0
Level 2 Certificate in Property (Residential Property and Lettings Management)	85	200	4401-22	600/1194/4

Version and date	Change detail	Section
Version 2 6 March 2013	Deleted references to Independent Advocacy in the 'simulation' paragraph at the end of each unit as this is not relevant to this qualification	Units
Version 2.1 September 2014	Updates to the following units Corrected credit value - 205 Corrected UAN – 208, 211, 215 Corrected GLH - 220	Units
2.2 February 2015	Unit 203 added to document and to structure of Level 2 Certificate in Property (Residential Letting and Management)	Units Structure
2.3 October 2017	Added TQT and GLH details Deleted QCF	Qualification at a Glance, Structure Appendix



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1 Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who are the qualifications for?	<p>City and Guilds Level 2 qualification in Property (Sale of Residential Property and Residential Letting and Management) has been developed for learners who are currently working in support/supervisory roles in residential letting/sales/management and allows them to take a qualification that recognises their current skills and knowledge.</p> <p>Learners will typically have roles which are customer service and administration orientated.</p>
What do the qualifications cover?	<p>A Level 2 qualification in Property allows candidates to learn, develop and practise the skills required for employment and/or career progression in the property sector.</p>
Are the qualifications part of a framework or initiative?	<p>City and Guilds Level 2 Certificate in Property serve as competence certificates, in the Intermediate Level 2 Apprenticeship framework for Property. Two apprenticeship pathways exists at Level 2:</p> <ul style="list-style-type: none"> • Apprenticeship/Modern Foundation Apprenticeship in Property Services (Sale of Residential Property) • Apprenticeship/Modern Foundation Apprenticeship in Property Services (Residential Property letting and management).
Who did we develop the qualification with?	<p>This qualification was developed in association with Asset Skills.</p>
What opportunities for progression are there?	<p>It allows candidates to progress into employment or to the following City & Guilds qualifications:</p> <ul style="list-style-type: none"> • Level 2 Modern Foundation Apprenticeship in Property Services • To support continuing professional development (CPD) learners who have achieved the Certificate in Property can progress to the Diploma in Property. • Other ILM Management Qualifications • Professional progression through membership of professional organisations

Structure

To achieve the **Level 2 Certificate in Property (Sale of Residential Property)**, learners must achieve **15** credits from the Mandatory Group A and a minimum of **3** credits from the Optional Group B. In addition, candidates taking an Apprenticeship must complete **4** credits from the Mandatory Apprenticeship Group C and a minimum of **11** credits from the Optional Apprenticeship Group D.

Unit accreditation number	City & Guilds unit	Unit title	Credit value
Mandatory		Group A	
M/600/2775	201	Reduce risks to health and safety in the workplace	3
T/601/2949	202	Understanding professional conduct in a property environment	1
M/601/2965	204	Know the legislation, guidelines, codes of practices and statutory information in residential sales	3
J/601/2972	205	Maintain the security of individuals and property in a property environment	2
R/601/2988	206	Progress customer enquiries associated with property services	2
R/601/2991	207	Maintain displays of marketing materials for properties	2
D/601/3111	211	Organise and progress viewing of properties	2
Optional		Group B	
F/601/3053	208	Organise market appraisals of properties	3
J/601/3121	212	Conduct accompanied viewings of all properties	3
J/601/3166	324	Hand over new properties to buyers	3
Mandatory		Apprenticeship Group C	
R/600/6351	220	Develop yourself in the job role	2
A/502/7524	219	Employment rights and responsibilities in the facilities management, housing and property sectors	2
Optional		Apprenticeship Group D	
F/601/1223	214	Deal with incoming telephone calls from customers	5
J/601/1224	215	Make telephone calls to customers	6
A/601/1219	216	Deal with customers across a language divide	8
L/601/1225	217	Deal with customers using bespoke software	5
A/601/1222	218	Use questioning techniques when delivering customers service	4

To achieve the **Level 2 Certificate in Property (Residential Letting and Management)**, learners must achieve **11** credits from the Mandatory Group A and a minimum of **9** credits from the Optional Group B, in addition, candidates taking an Apprenticeship must complete **4** credits from the Mandatory Apprenticeship Group C and a minimum of **8** credits from the Optional Apprenticeship Group D.

Unit accreditation number	City & Guilds unit	Unit title	Credit value
Mandatory		Group A	
M/600/2775	201	Reduce risks to health and safety in the workplace	3
T/601/2949	202	Understanding professional conduct in a property environment	1
R/601/2957	203	Know the legislation, guidelines, codes of practice and statutory information in residential lettings	3
J/601/2972	205	Maintain the security of individuals and property in a property environment	2
R/601/2988	206	Progress customer enquiries associated with property services	2
Optional		Group B	
R/601/2991	207	Maintain displays of marketing materials for properties	2
F/601/3053	208	Organise market appraisals of properties	3
D/601/3108	209	Prepare for the marketing of properties to let	2
Y/601/3110	210	Match and promote properties to individuals	3
D/601/3111	211	Organise and progress viewing of properties	2
J/601/3121	212	Conduct accompanied viewing of properties	3
L/601/3122	307	Progress applications to rent properties	3
Mandatory		Apprenticeship Group C	
A/502/7524	219	Employment rights and responsibilities in the facilities management, housing and property sectors	2
R/600/6351	220	Develop yourself in the job role	2
Optional		Apprenticeship Group D	
F/601/1223	214	Deal with incoming telephone calls from customers	5
J/601/1224	215	Make telephone calls to customers	6

Unit accreditation number	City & Guilds unit	Unit title	Credit value
A/601/1219	216	Deal with customers across a language divide	8
L/601/1225	217	Deal with customers using bespoke software	5
A/601/1222	218	Use questioning techniques when delivering customers service	4

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Level 2 Certificate In Property (Sale of Residential Property)	81	180
Level 2 Certificate In Property (Residential Property Letting and Management)	85	200



2 Centre requirements

Approval

There is no fast track approval for this qualification; existing centres who wish to offer this qualification must use the **standard** Qualification Approval Process.

Centres which are not approved to run City & Guilds qualifications will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Assessors and internal verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications, or meet the relevant experience requirements outlined above.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

Candidate entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully.

Age restrictions

There is no age restriction for these qualifications unless this is a legal requirement of the process or the environment.



3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs,
- support and guidance they may need when working towards their qualifications.
- any units they have already completed, or credit they have accumulated which is relevant to the qualifications.
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualifications, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems, including our own, **Learning Assistant**, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: www.cityandguilds.com/eportfolios.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate. *Recording forms* are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.



4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence for each unit

A technical certificate is required for learners completing a Level 2/Level 3 Apprenticeship. The underpinning knowledge is tested by the use of a bank of questions in accordance to the Asset Skills Property Services Assessment Strategy. The bank of questions consists of a core set of questions which relate to mandatory units and optional units.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification. RPL is allowed and is not sector specific.



5 Units

Structure of units

These units each have the following:

- City & Guilds reference number
- unit accreditation number (UAN)
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- learning outcomes which are comprised of a number of assessment criteria

Unit 201

Reduce risks to health and safety in the workplace

UAN:	M/600/2775
Level:	2
Credit value:	3
GLH:	25
Relationship to NOS:	This unit is linked to the Asset Skills NOS.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about reducing risks to health and safety in the workplace. It is about appreciating significant risks in the workplace and knowing how to identify and deal with them.

Learning outcome
The learner will: 1. know about their organisation's health and safety procedures
Assessment criteria
The learner can: 1.1 describe their responsibilities and legal duties for health and safety in the workplace 1.2 identify responsibilities and legal duties for health and safety specific to their own job role 1.3 name and locate the person responsible for health and safety in their area of work 1.4 describe where and when to get additional health and safety assistance 1.5 give reasons why it is important to follow manufacturer's instructions for the safe use of equipment materials and products.

Learning outcome
The learner will: 2. know how to identify the hazards in the workplace
Assessment criteria
The learner can: 2.1 define the term 'hazard' 2.2 give examples of hazards which could exist in the workplace and the safe working practices which should be followed and identify those specific to their own job role 2.3 give reasons why it is important to remain alert to the presence of

<p>hazards in the whole workplace</p> <p>2.4 describe why personal presentation and behaviour is important in maintaining health and safety in the workplace.</p>

Learning outcome
The learner will:
3. know how to evaluate risks in the workplace
Assessment criteria
The learner can:
3.1 define the term 'risk'
3.2 give reasons why they should deal with or report risks
3.3 describe procedures for reporting risks which they are unable to deal with
3.4 describe the risks to the environment which may be present in the workplace and your own job.

Learning outcome
The learner will:
4. be able to identify the hazards and risks in the workplace
Assessment criteria
The learner can:
4.1 select the workplace instructions relevant to the job
4.2 identify aspects of the workplace which could pose a danger to themselves or others
4.3 give examples of working practices in the job which could pose a danger to people in the workplace
4.4 assess which aspects of the workplace and working practices pose the highest risk and report them to the relevant person
4.5 deal with hazards in accordance with instructions and legal requirements

Learning outcome
The learner will:
5. be able to reduce the risks to health and safety in the workplace
Assessment criteria
The learner can:
5.1 perform duties in accordance with workplace instructions, manufacturer's instructions and legal requirements
5.2 use equipment materials and products safely and in accordance with instructions
5.3 use relevant equipment to control risks to health and safety
5.4 make suggestions on how to reduce risks to health and safety in the workplace to the relevant person
5.5 describe any differences between workplace instructions and manufacturer's instructions and report these to the relevant person
5.6 describe how your personal presentation and behaviour at work could cause risks to the health and safety of him/her self and others.

Unit 201 Reduce risks to health and safety in the workplace

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 202

Understanding professional conduct in a property environment

UAN:	T/601/2949
Level:	2
Credit value:	1
GLH:	2
Relationship to NOS:	This unit has partial coverage of Asset Skills units RL3, RL5, RL7, RL8, RL10, RL11, RL12, RL13, RL14, RL16, RL17, RL18, RL19, RL20 and RL21.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about presenting a professional image when working in a property environment. It includes providing information in a way which promotes understanding.

Learning outcome
The learner will: 1. understand how to present a positive image in a property environment
Assessment criteria
The learner can: 1.1 describe the standards of appearance and conduct which should be maintained in a property environment 1.2 explain why it is important to maintain standards of appearance and conduct in a property environment.

Learning outcome
The learner will: 2. understand the importance of communicating information clearly
Assessment criteria
The learner can: 2.1 explain why it is important to explain technical terms and abbreviations when providing information 2.2 explain why it is important to avoid jargon when providing information 2.3 explain the importance of checking that the recipient has understood the information given.

Unit 202 Understanding professional conduct in a property environment

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 203

Know the legislation, guidelines, codes of practice and statutory information in residential lettings

UAN:	R/601/2957
Level:	2
Credit value:	3
GLH:	12
Relationship to NOS:	This unit has partial coverage of Asset Skills units SOPRP3, SORP4, SORP5, SORP12, SORP15 and SORP22.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a residential lettings environment.

Learning outcome
The learner will: 1. know about the legislation, guidelines and codes of practice in residential lettings
Assessment criteria
The learner can: 1.1 list the: <ul style="list-style-type: none">• legislation• guidelines• codes of practice relevant to the: <ul style="list-style-type: none">○ security of individuals○ security of property○ providing information to tenants and landlords○ production of marketing materials for residential properties to let○ erection of boards○ organising market appraisals○ preparing properties for marketing○ contacting prospective tenants○ describing properties

<ul style="list-style-type: none"> o organising viewings of properties o progressing viewings of properties o conducting viewings of properties to let o progressing applications to rent properties o tenant deposits <p>1.2 describe how legislation, guidelines and codes of practice impact on:</p> <ul style="list-style-type: none"> • security of individuals • security of property • providing information to tenants and landlords • the display of marketing materials for residential properties to let • erection of boards • organising market appraisals • preparing properties for marketing • contacting prospective tenants • describing properties • organising viewings of properties • progressing viewings of properties • conducting viewings of properties to let • tenant deposits.
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Learning outcome
The learner will: 2. know about statutory information in residential lettings
Assessment criteria
The learner can: 2.1 list the typical range of statutory documents required for properties to let 2.2 explain the purpose of statutory information for property to let 2.3 describe why it is important to comply with statutory information requirements for property to let 2.4 describe why it is important to ensure that all statutory information for property to let is in place prior to marketing properties.

Unit 203

Know the legislation, guidelines, codes of practice and statutory information in residential lettings

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 204

Know the legislation, guidelines, codes of practice and statutory information in residential sales

UAN:	M/601/2965
Level:	2
Credit value:	3
GLH:	12
Relationship to NOS:	This unit has partial coverage of Asset Skills units SOPRP3, SORP4, SORP5, SORP12, SORP15 and SORP22.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a residential sales environment.

Learning outcome
The learner will: 3. know about the legislation, guidelines and codes of practice in residential sales
Assessment criteria
The learner can: 3.1 list the: <ul style="list-style-type: none">• legislation• guidelines• codes of practice relevant to the: <ul style="list-style-type: none">○ security of individuals○ security of property○ providing information to buyers and sellers○ production of marketing materials for residential properties for sale○ erection of boards○ organising market appraisals○ contacting prospective buyers○ describing properties○ organising viewings of properties

<ul style="list-style-type: none"> o progressing viewings of properties o conducting viewings of properties for sale <p>3.2 describe how legislation, guidelines and codes of practice impact on:</p> <ul style="list-style-type: none"> • security of individuals • security of property • providing information to buyers and sellers • production of marketing materials for residential properties for sale • erection of boards • organising market appraisals • contacting prospective buyers • describing properties • organising viewings of properties • progressing viewings of properties • conducting viewings of properties for sale.

Learning outcome
The learner will: 4. know about statutory information in residential sales
Assessment criteria
The learner can: 4.1 describe why it is important to comply with statutory information requirements for properties for sale.

Unit 204 Know the legislation, guidelines, codes of practice and statutory information in residential sales

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 205

Maintain the security of individuals and property in a property environment

UAN:	J/601/2972
Level:	2
Credit value:	2
GLH:	6
Relationship to NOS:	This unit is linked to the Asset Skills units RL2 and SORP2.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about contributing to the maintenance of the security of yourself, colleagues, customers and property, covering both personal property and properties available through the organisation. It includes identifying possible risks to security and applying appropriate security procedures at all times both in the office and when offsite at properties.

Learning outcome
The learner will: 1. know how to maintain the security of self and others
Assessment criteria
The learner can: 1.1 state the main types of risks: <ul style="list-style-type: none">• within the working environment• when visiting properties and development sites which may affect: <ul style="list-style-type: none">○ self○ colleagues○ others 1.2 describe the organisational procedures for minimising the risks to individuals
1.3 state the importance of monitoring the whereabouts of colleagues
1.4 describe what constitutes: <ul style="list-style-type: none">• unexpected circumstances• absences• departures from agreed schedules 1.5 describe the procedures which should be followed in the event of an emergency.

Learning outcome
The learner will: 2. know how to maintain the security of information about individuals
Assessment criteria
The learner can: 2.1 describe the organisational procedures for the security of information 2.2 give examples of types of information which may be sensitive 2.3 state who is entitled to receive different types of information about individuals 2.4 describe the organisational procedures for disposing of information relating to individuals and property that is no longer required.

Learning outcome
The learner will: 3. know how to maintain the security of property
Assessment criteria
The learner can: 3.1 state the main types of risks to: <ul style="list-style-type: none"> • personal property • residential properties 3.2 describe the actions and organisational procedures appropriate to minimising the risks to: <ul style="list-style-type: none"> • personal property • residential properties 3.3 describe the organisational procedures for the security and logging of keys and access codes for properties 3.4 describe the organisational procedures and security arrangements for the handling of cash and cheque payments.

Learning outcome
The learner will: 4. be able to maintain the security of self and others
Assessment criteria
The learner can: 4.1 identify risks: <ul style="list-style-type: none"> • within the working environment • when visiting properties and development sites which may affect: <ul style="list-style-type: none"> o self o colleagues o others 4.2 apply relevant security procedures and guidelines for addressing risks to: <ul style="list-style-type: none"> • self • colleagues • others

4.3	provide clear and accurate information to relevant colleagues regarding own travelling arrangements and schedules when visiting properties and sites
4.4	follow the organisational procedures for monitoring the whereabouts of colleagues
4.5	respond appropriately to any unexpected circumstances, absences and departures from agreed schedules
4.6	follow organisational procedures in the event of an emergency

Learning outcome	
The learner will:	
5.	be able to maintain the security of property, personal belongings and information
Assessment criteria	
The learner can:	
5.1	identify the security risks affecting: <ul style="list-style-type: none"> • properties • personal belongings
5.2	apply the relevant security procedures and guidelines for protecting: <ul style="list-style-type: none"> • properties • personal belongings • valuables • money • keys and access codes
5.3	follow organisational procedures for reporting any security equipment which is not functioning properly
5.4	follow organisational procedures for the security of information including the disposal of information which is no longer required

Unit 205 Maintain the security of individuals and property in a property environment

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 206

Progress customer enquiries associated with property services

UAN:	R/601/2988
Level:	2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL3 and SORP4.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about progressing enquiries about services associated with residential property. Enquiries can be general requests for information or specific requests regarding particular services and/or properties available via the organisation. It includes providing relevant information towards addressing enquiries and checking to confirm that the information fulfils requirements.

Learning outcome
The learner will: 1. know about the services offered by own organisation
Assessment criteria
The learner can: 1.1 describe the range of services offered by the organisation 1.2 describe the difference between features and benefits of services offered by the organisation

Learning outcome
The learner will: 2. know the organisational procedures for dealing with enquiries
Assessment criteria
The learner can: 2.1 state what information can be provided to enquirers 2.2 state what information is required to match individuals requirements to available properties 2.3 state what information is required to advise about services which are relevant to the individual needs

- | | |
|------|--|
| 2.4 | state what types of information are available to enquirers relating to properties being marketed by the organisation |
| 2.5 | describe how information relating to properties being marketed by the organisation is accessed |
| 2.6 | describe the organisational procedures for recording information about enquiries and their outcomes |
| 2.7 | state the importance of maintaining up to date records about enquiries |
| 2.8 | state what actions can be taken when interest in a property is expressed |
| 2.9 | state the limit of own responsibility and authority for handling enquiries |
| 2.10 | state the organisational procedures for referring on enquiries which are outside own responsibility and authority. |

Learning outcome
The learner will: 3. be able to progress enquiries
Assessment criteria
The learner can: 3.1 identify which services are required by the enquirer 3.2 gather information from enquirers which will help to provide them with the required information and agree their preferred method of communication 3.3 identify marketing materials which are relevant and provide these according to organisational procedures and requirements 3.4 ensure that information provided is: <ul style="list-style-type: none"> • complete • relevant to the enquiry • provided by the appropriate method 3.5 explain to the enquirer the features and benefits of using the organisation's services. 3.6 obtain agreement to use the organisation's services where possible 3.7 refer enquiries which are outside own responsibility and authority according to organisational procedures.

Unit 206

Progress customer enquiries associated with property services

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 207

Maintain displays of marketing materials for properties

UAN:	R/601/2991
Level:	2
Credit value:	2
GLH:	6
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL4 and SORP4.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about developing and maintaining marketing materials designed to promote properties. Displays can include window displays, wall mounted displays, websites and boards. It includes ensuring that materials are up to date and taking the relevant actions to ensure that materials are maintained and effective

Learning outcome
The learner will: 1. understand organisational procedures for the development of displays of marketing materials for properties
Assessment criteria
The learner can: 1.1 list the health and safety issues associated with different types of displays 1.2 describe how health and safety issues associated with displays should be addressed 1.3 describe organisational procedures for updating and removing boards from properties 1.4 state the limits of own responsibility and authority for the development of displays of marketing materials 1.5 state the organisational procedures for reporting issues that are outside own responsibility and authority when developing of displays of marketing materials.

Learning outcome
The learner will: 2. know how to use displays, web-based media and boards to promote properties
Assessment criteria
The learner can: 2.1 state the importance of displaying marketing materials effectively 2.2 state the advantages and disadvantages of using different types of marketing displays including: <ul style="list-style-type: none"> • wall mounted displays • window displays • web-based media • boards 2.3 state the importance of monitoring stocks of marketing materials and addressing any shortages 2.4 list the websites and press advertising that should be used in line with organisational procedures 2.5 list the factors which should be considered when deciding how to display marketing materials to their best effect.

Learning outcome
The learner will: 3. know how to maintain marketing materials for properties
Assessment criteria
The learner can: 3.1 state the importance of ensuring that: <ul style="list-style-type: none"> • displays are complete and maintained • new and updated materials are included promptly • outdated materials are amended • damaged materials are discarded 3.2 state the importance of monitoring stocks of marketing materials and addressing any shortages 3.3 state the importance of monitoring web-based marketing materials 3.4 describe the procedure for amending web-based marketing materials following organisational procedures 3.5 list factors which make marketing materials out of date.

Learning outcome
The learner will: 4. be able to use marketing materials and boards to promote properties
Assessment criteria
The learner can: 4.1 use marketing materials to provide a presentation of available properties which meets organisational requirements 4.2 ensure that boards are displayed at properties where applicable.

Learning outcome

The learner will:

5. be able to maintain marketing materials for properties

Assessment criteria

The learner can:

- 5.1 monitor displays and websites to ensure that marketing materials are accurate and up to date
- 5.2 ensure that new and updated marketing materials are included in:
 - displays
 - press
 - web-based media
- 5.3 ensure that properties which no longer need to be marketed are removed from:
 - displays
 - press
 - web-based media
- 5.4 monitor stocks of marketing materials and address any shortages
- 5.5 ensure that boards are updated to reflect the current status of properties
- 5.6 ensure that boards are removed from properties when they are no longer required in line with legal and organisational procedures
- 5.7 make reasoned recommendations to the relevant person about how marketing materials could be improved to enhance interest in properties.

Unit 207 Maintain displays of marketing materials for properties

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 208

Organise market appraisals of properties

UAN:	F/601/3053
Level:	2
Credit value:	3
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL5 and SORP5.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about agreeing with customers to undertake market appraisals of their property and making the necessary arrangements. It includes liaising with customers to explain the purpose of the appraisals and with any relevant colleagues involved in progressing the appraisals.

Learning outcome
The learner will: 1. understand market appraisals
Assessment criteria
The learner can: 1.1 explain the: <ul style="list-style-type: none">• purpose• limits and• benefits of market appraisals 1.2 list the main reasons why market appraisals are requested 1.3 state the importance of ensuring effective security arrangements for gaining access to properties

Learning outcome
The learner will: 2. know how to organise market appraisals of properties
Assessment criteria
The learner can: 2.1 describe what details should be obtained when organising market appraisals 2.2 describe how to ensure effective security arrangements for gaining access to properties 2.3 describe how to address the typical: <ul style="list-style-type: none"> • questions • issues that can arise when organising market appraisals 2.4 state the importance of ensuring that the customer agrees to a market appraisal of the property before making arrangements 2.5 describe the organisational procedures for organising market appraisals 2.6 state the importance of ensuring that everyone involved in the market appraisal has the appropriate information 2.7 state the importance of maintaining accurate records of market appraisals

Learning outcome
The learner will: 3. be able to organise market appraisals of properties
Assessment criteria
The learner can: 3.1 confirm the customer's agreement to going ahead with the market appraisal 3.2 agree with the customer: <ul style="list-style-type: none"> • access requirements • timescale for the appraisal • who will undertake the appraisal 3.3 encourage the customer to ask questions and answer these fully 3.4 identify outstanding issues towards arranging a market appraisal and take action to address these 3.5 ensure everyone involved in the market appraisal has the information required 3.6 maintain accurate records of market appraisals in line with organisational procedures.

Unit 208 Organise market appraisals of properties

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 209

Prepare for the marketing of properties to let

UAN:	D/601/3108
Level:	2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills unit RL9.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about preparing properties for marketing within a lettings environment. It includes the administration involved in gathering information and producing documents in line with the marketing activities planned for a property. It includes liaising with the landlord and those involved in producing the required documents to ensure that the finished products are correct and available on time. It is important to follow your organisation's procedures.

Learning outcome
The learner will: 1. know how to prepare for the marketing of properties to let
Assessment criteria
The learner can: 1.1 describe the organisational procedures for preparing and producing documents for residential properties to let 1.2 state the typical costs and timescales for the production of different types of documents for residential properties to let 1.3 state the importance of planning marketing activities for individual residential properties 1.4 describe why it is important to review all relevant information before preparing documents 1.5 list the main types of tenants of residential property 1.6 state the information which is of importance to different types of tenants 1.7 state the importance of gaining the approval of the landlord to produce documentation about a property.

Learning outcome

The learner will:

2. know how to arrange for the production of final documentation for residential property to let

Assessment criteria

The learner can:

- 2.1 explain why it is important to ensure that all people involved in the production of documents are fully briefed
- 2.2 give examples of problems that can occur when preparing final documentation for marketing properties to let
- 2.3 describe how to overcome problems which occur when preparing final documentation for marketing properties to let
- 2.4 state who final marketing materials should be made available to.

Learning outcome

The learner will:

3. be able to prepare for the marketing of properties to let

Assessment criteria

The learner can:

- 3.1 review all available information regarding the let relevant to the agreed marketing activities
- 3.2 identify:
 - marketing activities proposed for the property
 - associated timescales
- 3.3 identify the information to be conveyed to all relevant parties, including details of the property and its main features
- 3.4 prepare marketing materials in line with planned marketing activities and organisational procedures
- 3.5 check marketing materials are accurate and contain all relevant information in line with organisational procedures
- 3.6 present marketing materials to the landlord in line with organisational procedures
- 3.7 ensure that the landlord is advised of his/her responsibility for providing information regarding any subsequent changes to the property
- 3.8 check that documentation complies with all relevant legislation, guidelines and codes of practice relevant to preparing properties for marketing.

Unit 209 Prepare for the marketing of properties to let

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 210

Match and promote properties to individuals

UAN:	Y/601/3110
Level:	2
Credit value:	3
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL10 and SORP11.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about reviewing the properties available and matching these to the needs of prospective tenants or buyers known to your organisation. It also addresses contacting the prospective tenants or buyers, providing them with the details of relevant properties towards generating their interest in those properties available.

Learning outcome
The learner will: 1. know how to prepare for the marketing of properties to let
Assessment criteria
The learner can: 1.1 list the main types of tenants/buyers of residential property 1.2 identify factors which influence individual's decisions about properties 1.3 explain how to access information about properties available through the organisation to match to individuals 1.4 state what information is required from individuals to be able to match them to available properties 1.5 describe the organisational procedures for recording information regarding contacts made and the outcomes.

Learning outcome

The learner will:

2. know how to promote properties to individuals

Assessment criteria

The learner can:

- 2.1 describe the organisational procedures for contacting individuals about properties
- 2.2 outline what information can be provided about properties
- 2.3 state what actions should be taken when interest is expressed in a property.

Learning outcome

The learner will:

3. be able to match properties to individuals

Assessment criteria

The learner can:

- 3.1 identify properties which are available through the organisation
- 3.2 assess the types of individuals who are likely to have an interest in the properties
- 3.3 identify the requirements of individuals
- 3.4 match identified requirements with relevant features of properties
- 3.5 provide details of properties to interested parties
- 3.6 ensure that colleagues are informed about information given to individuals

Learning outcome

The learner will:

4. be able to promote properties to individuals

Assessment criteria

The learner can:

- 4.1 contact individuals using appropriate methods in line with organisational procedures
- 4.2 explain to individuals:
 - the relevant selling features of particular properties
 - why the selling features match their requirements
- 4.3 establish whether individuals are interested in particular properties
- 4.4 agree relevant actions towards assisting individuals to review further properties of interest
- 4.5 maintain records of contacts made in line with organisational procedures
- 4.6 ensure that relevant colleagues are informed of possible interest in particular properties
- 4.7 comply with all relevant legislation, guidelines and codes of practice when promoting properties.

Unit 210 **Match and promote properties to individuals**

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 211

Organise and progress viewings of properties

UAN:	D/601/3111
Level:	2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL11 and SORP12.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about organising the viewings of residential properties. It includes making appropriate arrangements for viewings and seeking and responding to feedback as a result of viewings. This unit is for use in either a sales or a lettings environment.

Learning outcome
The learner will: 1. know how to develop relationships with prospective buyers/tenants
Assessment criteria
The learner can: 1.1 list the main types of buyers/tenants of residential property 1.2 identify factors that influence individual's decisions about properties 1.3 describe the organisational procedures for contacting individuals 1.4 outline what information can be provided to interested parties about properties 1.5 outline the benefits to interested parties of viewing properties 1.6 list the range of viewing arrangements available 1.7 describe how to arrange viewings 1.8 describe types of visiting conditions and restrictions that may apply to different properties

Learning outcome
The learner will: 2. know how to follow up viewings
Assessment criteria
The learner can: 2.1 list factors that can affect the saleability of properties 2.2 describe organisational procedures for obtaining feedback following a viewing 2.3 state what actions should be taken when interest is expressed in a property 2.4 maintain records of viewings in line with organisational procedures

Learning outcome
The learner will: 3. be able to organise and progress viewings
Assessment criteria
The learner can: 3.1 promote the benefits of viewing properties 3.2 confirm the types of properties which are of interest to prospective buyers/tenants 3.3 agree with the prospective buyer/tenant the: <ul style="list-style-type: none"> • properties to be viewed • type of viewings to be undertaken 3.4 identify viewing conditions and restrictions relating to properties to be viewed 3.5 ensure that appropriate steps are taken to protect the health, safety and security of those involved in the viewing 3.6 ensure that all relevant parties are notified of the arrangements for the viewing.

Learning outcome
The learner will: 4. be able to review viewings of properties
Assessment criteria
The learner can: 4.1 obtain feedback from prospective buyers/tenants following viewings 4.2 record feedback from viewings in line with organisational procedures 4.3 take action to address any problems with viewings 4.4 agree relevant actions towards assisting individuals to progress interest in particular properties 4.5 maintain records of viewings in line with organisational procedures 4.6 ensure that relevant colleagues are informed of viewings and their outcomes 4.7 comply with all relevant legislation, guidelines and codes of practice relating to viewings of properties.

Unit 211 Organise and progress viewings of properties

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 212

Conduct accompanied viewings of properties

UAN:	J/601/3121
Level:	2
Credit value:	3
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills units RL12 and SORP15.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about accompanying prospective buyers/tenants to view properties it includes providing them with relevant information and knowledge regarding the property, and answering their questions. This unit is suitable for use in a sales or lettings environment.

Learning outcome
The learner will: 1. know how to prepare for viewings
Assessment criteria
The learner can: 1.1 list the key features of the local property area which are of interest to prospective buyers/tenants 1.2 list the types of marketing materials regarding the organisation's properties and how to access them 1.3 state how to obtain information about any fixtures and fittings which are included in a property 1.4 describe how the following are identified: <ul style="list-style-type: none">• typical property values in the area• types of different property that are being sold/let.

Learning outcome
The learner will: 2. know how to liaise with prospective buyers/tenants
Assessment criteria
The learner can: 2.1 list the main types of buyers/tenants of residential properties 2.2 identify factors that influence individual's decisions 2.3 outline what information can be provided to individuals about properties 2.4 describe types of visiting conditions and restrictions that may apply to different properties 2.5 give examples of typical questions asked about properties 2.6 state how questions about properties should be addressed 2.7 state what actions should be taken when interest is expressed in a property.

Learning outcome
The learner will: 3. be able to prepare to conduct accompanied viewings
Assessment criteria
The learner can: 3.1 confirm the property is still available 3.2 confirm arrangements for the viewing with all relevant parties 3.3 obtain current marketing materials for the property to be viewed 3.4 identify all relevant: <ul style="list-style-type: none"> • specifications for the property • details of fixture and fittings available 3.5 identify the types and locations of local services and amenities 3.6 ensure that individuals have accurate and clear directions for the property to be viewed 3.7 check that access to the property is available at the time of the proposed viewing 3.8 take action to address any problems with the viewing

Learning outcome
The learner will: 4. be able to conduct viewings of properties
Assessment criteria
The learner can: 4.1 attend appointments at the agreed time and place 4.2 confirm with the prospective buyer/tenant: <ul style="list-style-type: none"> • own identity • identity of the prospective buyer/tenant • objectives for the viewing • proposed itinerary • their expectations

- 4.3 promote the key selling points of the property
- 4.4 provide accurate information about local services and amenities
- 4.5 check that individuals have understood information and answer questions asked if any
- 4.6 record significant comments regarding properties of interest in line with organisational procedures
- 4.7 identify properties of interest and agree actions to progress interest
- 4.8 carry out viewings in accordance with any conditions and restrictions
- 4.9 take steps to maintain health, safety and security for all parties
- 4.10 ensure that the property is secure on departure
- 4.11 maintain clear and accurate records of viewings and their outcomes
- 4.12 ensure that relevant colleagues are kept informed of viewings and their outcomes
- 4.13 comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied viewings.

Unit 212 Conduct accompanied viewings of properties

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 214

Deal with incoming telephone calls from customers

UAN:	F/601/1223
Level:	2
Credit value:	5
GLH:	33
Relationship to NOS:	This unit directly relates to unit A11 of the Customer Service NOS 2010.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Learning outcome
The learner will: 1. use communication systems effectively
Assessment criteria
The learner can: 1.1 operate telecommunication equipment efficiently and effectively 1.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer 1.3 listen carefully when collecting information from their customer 1.4 select the information they need to record and store following their organisation's guidelines 1.5 update their customer records during or after the call to reflect the key points of the conversation.

Learning outcome
The learner will: 2. establish rapport with customers who are calling
Assessment criteria
The learner can: 2.1 greet their customer following their organisation's guidelines 2.2 listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call 2.3 confirm the identity of their customer following organisational guidelines 2.4 use effective and assertive questions to clarify their customer's requests

Learning outcome
The learner will: 3. deal effectively with customer questions and requests
Assessment criteria
The learner can: 3.1 identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each 3.2 choose the option that is most likely to lead to customer satisfaction within the service offer 3.3 give clear and concise information to customers in response to questions or requests 3.4 use questions and answers to control the length of the conversation 3.5 keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time 3.6 put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague 3.7 summarise the outcome of the call and any actions that they or their customer will take as a result 3.8 check before the call is finished that their customer is content that all their questions or requests have been dealt with 3.9 complete any follow up actions agreed during the call 3.10 take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests 3.11 ensure that promises to call back are kept.

Learning outcome
The learner will: 4. know how to deal with incoming telephone calls from customers
Assessment criteria
The learner can: 4.1 describe their organisation's guidelines and procedures for the use of telecommunication equipment 4.2 explain how to operate the organisation's telecommunication equipment 4.3 explain the importance of speaking clearly and slowly when dealing

- with customers by telephone
- 4.4 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone
 - 4.5 explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
 - 4.6 identify what information is important to note during or after telephone conversations with customers
 - 4.7 describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
 - 4.8 explain the importance of keeping their customer informed if they are on hold during a call
 - 4.9 explain the importance of not talking across an open line
 - 4.10 list details that should be included if taking a message for a colleague
 - 4.11 describe their organisation's guidelines and procedures for taking action to follow up calls made to customers
 - 4.12 describe their organisation's guidelines for handling abusive calls.

Unit 214 Deal with incoming telephone calls from customers

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 215

Make telephone calls to customers

UAN:	J/601/1224
Level:	2
Credit value:	6
GLH:	40
Relationship to NOS:	This unit directly relates to unit A12 of the Customer Service NOS 2010.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Learning outcome
The learner will: 1. plan their calls effectively
Assessment criteria
The learner can: 1.1 use all appropriate customer information to plan their call 1.2 anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer 1.3 identify the objective of their call and the way in which they expect the call to end 1.4 plan the opening part of their conversation with their customer and anticipate possible responses.

Learning outcome
The learner will: 2. use communication systems effectively
Assessment criteria
The learner can: 2.1 operate telecommunication equipment efficiently and effectively 2.2 speak clearly and slowly and adapt their speech to meet the individual needs of their customer 2.3 listen carefully when collecting information from their customer 2.4 select the information they need to record and store following their organisation's guidelines 2.5 update their customer records during or after the call to reflect the key points of the conversation.

Learning outcome
The learner will: 3. make focused calls to their customer
Assessment criteria
The learner can: 3.1 open the conversation positively and establish a rapport with their customer 3.2 confirm the identity of their customer following organisational guidelines 3.3 ensure that their customer is aware of the purpose of their call as early as possible 3.4 respond positively to queries and objections from their customer 3.5 summarise the outcome of the call and any actions that they or their customer will take as a result 3.6 complete any follow up actions agreed during the call

Learning outcome
The learner will: 4. know how to make telephone calls to customers
Assessment criteria
The learner can: 4.1 describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls 4.2 describe their organisation's guidelines and procedures for the use of telecommunication technology 4.3 explain how to operate their organisation's telecommunication technology 4.4 explain the importance of speaking clearly and slowly when dealing with customers by telephone 4.5 describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone

- 4.6 explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
- 4.7 identify what information it is important to note during or after telephone conversations with customers
- 4.8 describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
- 4.9 describe their organisation's guidelines and procedures for taking action to follow up calls made to customers.

Unit 215 Make telephone calls to customers

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 216

Deal with customers across a language divide

UAN:	A/601/1219
Level:	2
Credit value:	8
GLH:	53
Relationship to NOS:	This unit directly relates to the Customer Service NOS 2010.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally

Learning outcome
The learner will: 1. prepare to deal with customers with a different first language
Assessment criteria
The learner can: 1.1 identify the language or languages other than their own that they are most likely to come across when dealing with customers 1.2 learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter 1.3 identify a source of assistance with a language they expect to encounter when delivering customer service

- 1.4 agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language
- 1.5 log useful words and phrases to support their dealings with a customer with a different first language
- 1.6 learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently.

Learning outcome
The learner will: 2. deal with customers who speak a different first language from their own
Assessment criteria
The learner can: 2.1 identify their customer's first language and indicate to the customer that they are aware of this 2.2 establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs 2.3 speak clearly and slowly if using a language which is not the first language for either them or their customer 2.4 maintain a consistent tone and volume when dealing with somebody across a language divide 2.5 listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words 2.6 check their understanding of specific words with their customer using questions for clarification 2.7 seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers 2.8 reword a question or explanation if their customer clearly does not understand their original wording 2.9 use a few words of their customer's first language to create a rapport.

Learning outcome
The learner will: 3. know how to deal with customers across a language divide
Assessment criteria
The learner can: 3.1 list the languages that they are most likely to encounter among groups of their customers 3.2 state how to greet, thank and say farewell to customers in their first languages 3.3 explain the importance of dealing with customers in their first language if possible 3.4 describe how to explain to a customer that they cannot hold an extended conversation in their first language 3.5 explain the importance of tone, pace and volume when dealing with customers across a language divide 3.6 identify possible sources of assistance to use when a language barrier demands additional language skills.

Unit 216 Deal with customers across a language divide

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 217

Deal with customers using bespoke software

UAN:	L/601/1225
Level:	2
Credit value:	5
GLH:	33
Relationship to NOS:	This unit directly relates to unit B7 of the Customer Service NOS 2010.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Learning outcome
The learner will: 1. prepare to deliver customer service using bespoke software
Assessment criteria
The learner can: 1.1 sign on and open access to appropriate functions in the IT system 1.2 navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas 1.3 explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver 1.4 ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed 1.5 prepare their work area to deliver customer service using bespoke software

Learning outcome

The learner will:

2. deliver customer service using bespoke software

Assessment criteria

The learner can:

- 2.1 identify their customer or the services or products they wish to access
- 2.2 follow organisational procedures to step through the system in a way that responds to their customer's needs
- 2.3 use search or other specialist functions within the software to respond to customer requests
- 2.4 enter new records using the bespoke software system
- 2.5 amend customer service records in the bespoke software system
- 2.6 communicate with their customers in terms they can understand relating to the software system
- 2.7 follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
- 2.8 interpret error messages and act on them to support their customer service
- 2.9 refer their customer to a colleague following organisational procedures if they are unable to complete the transaction.

Learning outcome

The learner will:

3. understand how to deal with customers using bespoke software

Assessment criteria

The learner can:

- 3.1 describe access and sign-on routines for the bespoke software system
- 3.2 describe the architecture and geography of the bespoke software system
- 3.3 identify different screen or menu routes that can be followed to meet customer requirements
- 3.4 identify sources of support and help for the bespoke software including manuals, help screens and help lines
- 3.5 explain the importance of preparing a work area before delivering customer service
- 3.6 explain search or other enquiry facilities within the bespoke software system
- 3.7 state the importance of avoiding jargon and system terminology when communicating with customers
- 3.8 describe ways to respond to error messages when using a bespoke software system
- 3.9 identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system.

Unit 217 Deal with customers using bespoke software

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 218

Use questioning techniques when delivering customer service

UAN:	A/601/1222
Level:	2
Credit value:	4
GLH:	27
Relationship to NOS:	This unit directly relates to unit B6 of the Customer Service NOS 2010.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses

Learning outcome
The learner will: 1. establish rapport and identify customer concerns
Assessment criteria
The learner can: 1.1 greet their customer sincerely and invite a full and open response 1.2 use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry 1.3 invite more detailed explanation from their customer 1.4 listen closely to their customer's responses to strengthen their understanding of customer concerns 1.5 use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation 1.6 identify and note their customer's feelings and mood in relation to the information they are seeking.

Learning outcome
The learner will: 2. seek detailed information from customers using questioning techniques
Assessment criteria
The learner can: 2.1 follow a planned trail of questions to explore in detail customer concerns they have already identified 2.2 hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified 2.3 explain to their customer why they need the information they are asking for 2.4 use probing and searching questions that draw on comments or words used by their customer 2.5 thank their customer for the information in a way that encourages further open responses 2.6 use pre-planned routing and trigger questions that lead their customer to respond in new areas 2.7 follow organisational procedures to record customer responses to inform future actions

Learning outcome
The learner will: 3. understand how to use questioning techniques when delivering customer service
Assessment criteria
The learner can: 3.1 explain why establishing rapport makes it easier to draw information from customers 3.2 describe ways to greet customers that immediately build rapport 3.3 explain reasons for using planned question patterns to draw out particular information 3.4 explain reasons for using spontaneous conversation to draw out particular information 3.5 explain the importance of active listening when seeking detailed information from customers 3.6 identify the differences between and uses of closed and open questions 3.7 describe the importance of explaining to customers why information is needed 3.8 explain why particular trigger questions are effective in gaining specific information

Unit 218

Use questioning techniques when delivering customer service

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 219

Employment rights and responsibilities in the facilities management, housing and property sectors

UAN:	A/502/7524
Level:	2
Credit value:	2
GLH:	16
Relationship to NOS:	This unit is directly related to the RL and SORP NOS.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	Successful assessment of the unit proves that the candidate has achieved the national occupational standard to understand employment rights and responsibilities

Learning outcome
The learner will: 1. know employer and employee rights, responsibilities and own organisational procedures
Assessment criteria
The learner can: 1.1 state employer and employee rights and responsibilities under employment law, the Equality Act, Health & Safety and other relevant legislation 1.2 state importance of having employment rights and responsibilities 1.3 describe organisational procedures for health & safety, including documentation 1.4 describe organisational procedures for equality & diversity, including documentation 1.5 identify sources of information and advice on employment rights and responsibilities

Learning outcome

The learner will:

2. know factors that affect own organisation and occupation

Assessment criteria

The learner can:

- 2.1 describe the role played by own occupation within organisation and industry
- 2.2 describe career pathways available to them
- 2.3 state types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry
- 2.4 identify sources of information and advice on own industry, occupation, training and career
- 2.5 describe principles, policies and codes of practice used by own organisation and industry
- 2.6 describe issues of public concern that affect own organisation and industry

Unit 219 Employment Rights and Responsibilities in the Facilities Management, Housing and Property Sectors

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 220

Develop yourself in the job role

UAN:	R/600/6351
Level:	2
Credit value:	2
GLH:	12
Relationship to NOS:	This unit has been developed from NOS C2 03 and C2 04.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about developing yourself in your job by identifying areas for further development and setting yourself targets for achieving this

Learning outcome
The learner will: 1. know how to develop him/her self in the job
Assessment criteria
The learner can: 1.1 identify activities that could help with self development 1.2 describe how to set targets for personal development 1.3 state the importance of setting achievable personal development targets 1.4 identify the types of support available to achieve targets 1.5 describe the procedures for accessing support 1.6 state the importance of reviewing and updating progress against targets 1.7 describe the procedures for reviewing and updating progress 1.8 list the benefits of discussing progress with others

Learning outcome
The learner will: 2. be able to develop him/her self in the job
Assessment criteria
The learner can: 2.1 identify and agree areas where they could develop further 2.2 agree achievable targets for personal development 2.3 agree the time and support required to achieve targets 2.4 demonstrate new skills in the workplace 2.5 request and use feedback on own performance from others.

Unit 307

Progress applications to rent property

UAN:	L/601/3122
Level:	3
Credit value:	3
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills unit RL13.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about obtaining information regarding prospective tenants relevant to assessing their suitability towards the property. It includes arranging checks and undertaking referencing. During this process it is important to take into account legislation eg the Data Protection Act

Learning outcome
The learner will: 1. understand organisational procedures for progressing applications to rent property
Assessment criteria
The learner can: 1.1 state what information can be provided to prospective tenants 1.2 state who should be consulted internally about the suitability of prospective tenants 1.3 describe the organisational procedures for recording information about qualifying tenants 1.4 state the limits of own responsibility and authority for progressing applications to rent property 1.5 state the organisational procedures for reporting issues that are outside own responsibility and authority when progressing applications to rent property

Learning outcome
The learner will: 2. know how to qualify prospective tenants
Assessment criteria
The learner can: 2.1 explain the importance of gaining the consent of the prospective tenant to seek further information about them 2.2 describe factors that may affect prospective tenants: <ul style="list-style-type: none"> • ability to rent property • acceptability to landlords 2.3 state what information is needed to determine tenants' circumstances 2.4 state the importance of explaining to the tenant why information about them is required 2.5 state what information must be obtained from other organisations 2.6 state the importance of maintaining confidentiality when obtaining information from other organisations 2.7 list issues that can arise when seeking information 2.8 describe how to address any issues that can arise when seeking information

Learning outcome
The learner will: 3. be able to obtain information to qualify prospective tenants
Assessment criteria
The learner can: 3.1 confirm information about prospective tenants to establish their circumstances relevant to renting a property 3.2 obtain permission from the prospective tenant to seek further information from other organisations where relevant 3.3 follow organisational procedures to obtain information regarding prospective tenants from other organisations 3.4 gather relevant information from prospective tenants, including preferred timescales for moving in 3.5 explain to prospective tenants any administration fees charged by the organisation including: <ul style="list-style-type: none"> • purpose of the fees • times when fees are charged • potential refunds.

Learning outcome
The learner will: 4. be able to progress applications to rent property
Assessment criteria
The learner can: 4.1 identify any problems with obtaining the required information 4.2 follow organisational procedures to undertake referencing 4.3 report the results of the referencing process to relevant people within the organisation 4.4 check that prospective tenants have understood the information and encourage questions 4.5 maintain up to date records in line with organisational procedures 4.6 comply with all relevant legislation, guidelines and codes of practice when progressing applications to rent property

Unit 307 Progress applications to rent property

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.

Unit 324

Hand-over new properties to buyers

UAN:	J/601/3166
Level:	3
Credit value:	3
GLH:	10
Relationship to NOS:	This unit has a direct relationship with Asset Skills unit SORP22.
Unit endorsed by a sector or regulatory body:	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
Aim:	This unit is about inspecting new properties during their development to ensure that specifications agreed with your customer are being fulfilled, and then completing the hand-over to the customer when the property is available. The specifications can cover the structure of the property, finishes, fixtures and fittings, furnishings and any appliances available.

Learning outcome
The learner will: 1. understand organisational procedures for the hand-over of new properties to buyers
Assessment criteria
The learner can: 1.1 explain the organisational procedures for inspecting and handing over new properties to buyers 1.2 explain why it is important to obtain approvals and documented agreements from prospective buyers 1.3 explain the organisational procedures for recording inspections and the hand-over of new properties 1.4 explain the limits of own limits of responsibility and authority for the hand-over of new properties 1.5 explain the organisational procedures for reporting issues that are outside of own responsibility and authority when handing over new properties

Learning outcome

The learner will:

2. understand how to complete the hand-over of new properties to buyers

Assessment criteria

The learner can:

- 2.1 explain why it is important to inspect new properties as they are being constructed and fitted out
- 2.2 explain why it is important to ensure that the new property is clean and tidy
- 2.3 explain the documentation and instruction manuals that need to be obtained prior to hand-over to the prospective buyer
- 2.4 give examples of the types of fittings and appliances which require explanation as to how they work
- 2.5 analyse the main types of queries or problems that can arise when moving into a new property
- 2.6 describe the contact procedures available to prospective buyers for dealing with queries or problems.

Learning outcome

The learner will:

3. be able to inspect new property prior to its hand-over to buyers

Assessment criteria

The learner can:

- 3.1 identify the approved specifications for the new property as agreed with the prospective buyer
- 3.2 inspect the progress of new properties at appropriate intervals to monitor that specifications are being met
- 3.3 check that all fittings and appliances are in working order
- 3.4 address any problems with fittings and appliances promptly
- 3.5 identify any variances from agreed specifications
- 3.6 take action to address variances in the specification
- 3.7 address any problems with cleanliness or redundant materials
- 3.8 obtain all documents and instruction manuals relating to properties in preparation for hand-over to buyers
- 3.9 maintain accurate and completed records of inspections
- 3.10 ensure that access to the new property is safe.

Learning outcome

The learner will:

4. be able to complete the hand-over of a new property

Assessment criteria

The learner can:

- 4.1 follow the procedures for handing over new properties to buyers
- 4.2 identify any aspects of the specification which differ from what was agreed with the buyer
- 4.3 explain to the buyer the reasons for any differences to the specification
- 4.4 address any discrepancies to the specification
- 4.5 obtain confirmation from buyers that specifications are accepted where possible
- 4.6 explain to the buyer how fittings and appliances work
- 4.7 provide buyers with all documentation and keys to the property
- 4.8 provide buyers with details for contacting relevant people in the event of any subsequent queries or problems
- 4.9 check that buyers have understood the information provided and encourage questions
- 4.10 maintain accurate records regarding the hand-over in line with organisational procedures
- 4.11 comply with all relevant legislation, guidelines and codes of practice relating to the hand-over of new properties.

Unit 324 Hand-over new properties to buyers

Supporting information

Evidence requirements

You must provide your assessor with evidence for all the learning outcomes and assessment criteria. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special considerations:

The nature of this unit means that most of your evidence must come from real work activities.

Simulation can only be used in exceptional circumstances. For example where performance is critical, high risk or happens infrequently.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation.



Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Events:** dates and information on the latest Centre events
- **Online assessment:** information on how to register for GOLLA/e-volve assessments.

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

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