Unit 207 Communicate with customers in writing

UAN:	**T/506/2126**
Level:	2
Credit value:	3
GLH:	20
Relationship to NOS:	Customers Service (2013) National Occupational Standards: • CFACSA13 Deal with customers in writing or electronically
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to communicate with customers in writing. Upon completion of this unit, learners will be able to both plan and produce written communications.

Learning outcome
The learner will: 1. understand how to communicate with customers in writing
Assessment criteria
The learner can: 1.1 explain why it is necessary to use different forms of **written communication** for different purposes 1.2 describe practices for producing different forms of **written communications** 1.3 describe the potential **benefits** and **limitations** associated with communicating with customers in writing 1.4 explain the implications of confidentiality and data protection in communicating with customers in writing.

Assessment guidance
Written communication is needed when: • the communication must be in writing eg legal documents, policies, instructions • when a customer complains and a written response is required • when clarification is needed to ensure no misunderstanding

Benefits:

- is useful for reference in the future
- can be checked by others, including more senior staff, to check accuracy and that the message is clear
- is necessary where there are legal implications when a document is needed

Limitations:

- takes time to produce
- requires resources eg computer, paper
- is not immediate
- poor completion can mean communication is not clear or correct which can mean it is not effective and may cause problems for the organisation
- may not be taking account of those with limited reading skills, or writing skills if a response is needed

Evidence may be supplied by:

- professional discussion
- reflective account
- questioning
- organisational policies and procedures*

Learning outcome
The learner will: 2. be able to plan written communications to customers
Assessment criteria
The learner can: 2.1 Identify the objective(s) of the **communication** 2.2 gather the information needed to draft the **communication** 2.3 select the form of written **communication** that is most likely to lead to customer satisfaction within the **service offer**.

Assessment guidance
Communication: eg • letters • emails • reports • other written communication appropriate to the learner's workplace **Service offer:** This details what an organisation will do for a customer, what level of customer service will be on offer and the limit of what will be offered. It also ensures consistency in the service offered

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- letters/emails or other relevant documentation
- customer data/records.*

Learning outcome
The learner will: 3. be able to communicate with customers in writing
Assessment criteria
The learner can: 3.1 produce communications that recognise customers' points of view in accordance with **organisational standards, styles and tone** 3.2 use language that is clear and concise, adapting it to meet identified customer needs 3.3 record decisions and actions taken and the reasons for them 3.4 adhere to **organisational policies and procedures, legal and ethical requirements** when communicating with customers in writing.

Assessment guidance

Organisational standards, styles and tone:

- limits of authority
- house styles
- use of templates

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- service offer
- handling of customer issues
- house style
- use of templates

Legal requirements:

eg

- Data Protection Act
- Equality Act

Ethical requirements:

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- letters/emails or other documentation
- customer data/records*

- organisational policies and procedures.*

This unit is about communicating in writing and not communicating verbally which is covered in unit 206.

Here the candidate will require to be observed communicating in writing with a number of customers over time. In addition to observations, witness testimonies and other forms of evidence can be used.

* While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.