Unit 210 Promote additional products and/or services to customers

UAN:	**L/506/2133**
Level:	2
Credit value:	2
GLH:	14
Relationship to NOS:	Customers Service (2013) National Occupational Standards: • CFACSA5 Promote additional services or products to customers
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 promote additional products and/or services to customers. Upon completion of this unit, learners will be able to promote additional products and/or services to customers.

Learning outcome
The learner will: 1. understand the promotion of additional products and/or services to customers
Assessment criteria
The learner can: 1.1 describe organisational policies and procedures on the promotion of **additional products and/or services** 1.2 explain the importance of keeping product/service knowledge up to date 1.3 explain how to match products and/or services to customer needs 1.4 describe **techniques** to promote additional products and/or services.

Assessment guidance
Additional products and/or services: • cross selling – to suggest a related product or service eg a toothbrush when the customer is buying toothpaste • up-selling eg when you try to sell a more expensive product or service than the one the customer was originally interested in

Techniques:

- listening to customer needs
- at point of sale
- to existing customers

Evidence may be supplied by:

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

Learning outcome
The learner will: 2. be able to promote additional products and/or services to customers
Assessment criteria
The learner can: 2.1 identify **opportunities** to promote additional products and/or services that are likely to improve the customer experience 2.2 promote the benefits of additional products and/or services that are likely to be of interest to customers 2.3 provide information to customers that will help them to decide whether to select additional products and/or services 2.4 adhere to **organisational policies and procedures, legal and ethical requirements** when promoting products and/or services.

Assessment guidance
Opportunities: • acting on information given by customers • selling to existing customers • explaining how it will enhance the product/service • at point of sale **Organisational policies and procedures** which relate to: • roles and responsibilities showing limits of authority • service offer • handling of customers **Legal requirements:** eg • Sale of Goods Act (Sale and Supply of Goods to Consumers Regulations) • Trade Descriptions Act • Data Protection Act • Equality Act

Ethical requirements:

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- product/service information*
- service offer*
- customer feedback*
- organisational policies and procedures*
- organisational ethical policies*

Note: this unit is about promoting **additional** products and/or services to customers.

Here the candidate will require to be observed carrying out the task 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.