Unit 213 Deliver customer service whilst working on customer's premises

UAN:	**T/506/2143**
Level:	2
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: • CFACSB3 Deliver customer service on your customer's premises
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 deliver customer service whilst working on customers' premises. Upon completion of this unit, learners will be able to deliver customer service whilst working on customers' premises.

Learning outcome
The learner will: 1. understand how to deliver customer service whilst working on customers' premises
Assessment criteria
The learner can: 1.1 describe the **preparations** that need to be made prior to a visit 1.2 explain the importance of being positive about the product and/or service 1.3 explain **organisational standards of presentation, behaviour and communication** 1.4 explain the purpose of advising customers why work cannot be carried out that has not been previously agreed 1.5 explain how to identify possible risks relating to the work to be carried out 1.6 explain the way in which **legislation** affects the work to be carried out.

Assessment guidance

Preparations:

eg

- preparing paperwork and/or materials
- making a pre-call to confirm the visit
- checking the schedule
- packing materials for delivery

Organisational standards of presentation, behaviour and communication:

- dress code
- uniform to be worn
- any special dress code when entering a customer's premises eg shoes, gloves, PPE
- behaviour including language to be used and what should not be used

Legislation:

- Health and Safety at Work Act
- Equality Act
- Data Protection Act

Evidence may be supplied by:

- professional discussion
- questioning
- reflective account
- organisational standards of presentation, behaviour and communication.

Learning outcome

The learner will:

2. be able to deliver customer service whilst working on customers' premises

Assessment criteria

The learner can:

2.1 **Identify themselves to customers**

2.2 take action to ensure that customers know when, why and for how long work will be carried out on their premises

2.3 confirm with customers the nature of work to be carried out on their premises

2.4 keep customers informed of progress, delays, variations to work to be carried out and follow up needed

2.5 treat customers, their premises and property with consideration

2.6 confirm that the customer is satisfied with the outcome

2.7 maintain their own **personal safety and security** and that of customers whilst on customers' premises.

Assessment guidance

Identify themselves to customers:

It is important to ensure customers are correctly greeted and shown personal credentials/identity card or similar.

Personal safety and security:

The candidate should ensure they are aware of all health and safety requirements including that of a lone worker if appropriate.

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- marketing materials
- manuals*
- documentation*
- schedules/rotas/daily plan
- legislative requirements and organisational policies and procedures*

Note: this unit is about delivering customer service whilst working on customers' premises which could be residential or business premises. The candidate could be eg carrying out work on the premises, caring for a customer in their premises or delivering goods into the premises.

Here the candidate will require to be observed preparing for a visit(s) and then delivering customer service on customer's premises. This requires to be carried out on more than one occasion. Witness testimonies can be added if necessary.

* 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.