

<b>UAN:</b>	<b>Y/506/2149</b>
<b>Level:</b>	2
<b>Credit value:</b>	3
<b>GLH:</b>	18
<b>Relationship to NOS:</b>	This unit is linked to the Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> <li>• CFACSD1 Develop customer relationships</li> </ul>
<b>Assessment requirements specified by a sector or regulatory body:</b>	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
<b>Aim:</b>	This unit aims to develop the knowledge and skills required to develop customer relationships. Upon completion of this unit, learners will be able to develop relationships with customers.

<b>Learning outcome</b>
The learner will: <ol style="list-style-type: none"> <li>1. understand how to develop customer relationships</li> </ol>
<b>Assessment criteria</b>
The learner can: <ol style="list-style-type: none"> <li>1.1 describe the importance of developing relationships with customers</li> <li>1.2 explain the value of <b>customer loyalty and retention</b></li> <li>1.3 explain how customers' <b>expectations</b> may change over time</li> <li>1.4 explain the use of <b>customer feedback</b> as a means of developing customer relationships</li> <li>1.5 explain the limits of their own authority to make <b>alternative service offers</b> to customers</li> <li>1.6 describe the use of <b>Customer Relationship Management systems</b> and processes to meet customers' expectations</li> <li>1.7 explain the importance of regular communication in the development of both internal and external customer relationships.</li> </ol>

## **Assessment guidance**

### **Customer loyalty and retention:**

Customer loyalty is important as it means customers return and are a captive market. It is important to keep/retain customers as it can be cheaper than having to work at finding and winning new customers. If there is a good existing customer base you can use them to sell to, gain feedback from etc.

### **Expectations:**

What the customer thinks they should experience or get.

### **Customer feedback:**

Can be obtained through surveys, questionnaires, forums, social media, comment cards, customer comments.

### **Alternative service offers:**

eg

- discounts
- replacement products
- reduction

### **Customer Relationship Management systems:**

The uses of an effective CRM system are it:

- allows access across operations within an organisation eg it can be accessed by marketing to gain an insight into customer needs, likes etc but can also be accessed by sales to get details on customers to target by looking at past purchases, profitability
- allows greater customer contact and communication through the information held and so can improve the customer service offered by all departments with access. Customers can also freely offer information they want to be held again improving the potential to build the customer relationship
- allows control of sales and marketing by giving more specific information that has been gathered over time
- is used to monitor customers, their behaviour, needs, purchases etc and so aids forecasting of future needs, purchases etc.

### **Evidence may be supplied by:**

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

\*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.

Note: 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.

<b>Learning outcome</b>
The learner will: 2. be able to develop relationships with customers
<b>Assessment criteria</b>
The learner can: 2.1 give help and information that meets or exceeds customers' <b>expectations</b> 2.2 identify new ways of helping customers based on their <b>feedback</b> 2.3 share feedback from customers with others 2.4 identify <b>added value</b> that the organisation could offer customers 2.5 bring to customers' attention products or services that may interest them.

<b>Assessment guidance</b>
<p><b>Expectations:</b> What the customer thinks they should experience or get.</p> <p><b>Feedback:</b> Can be obtained through surveys, questionnaires, forums, social media, comment cards, customer comments.</p> <p><b>Added value:</b> Where the customer receives something they see as adding to the value of the product or service eg the offer of a two year free product guarantee can be seen by the customer as adding value to the product they are buying</p> <p><b>Evidence may be supplied by:</b></p> <ul style="list-style-type: none"> <li>• observation</li> <li>• witness testimony</li> <li>• customer records*</li> <li>• professional discussion</li> <li>• questioning</li> <li>• reflective account</li> <li>• service offer*</li> <li>• feedback</li> <li>• documentation*</li> <li>• legislation, organisational policies and procedures**.</li> </ul> <p>Note: this unit is about developing customer relationships. Here the candidate will require to be observed over time developing relationships with customers. Witness testimonies can be added if necessary.</p> <p>*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. **Note: 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.</p>