# Unit 404 Build and maintain effective customer relations

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| **UAN:** | **R/506/2179** |
| **Level:** | 4 |
| **Credit value:** | 6 |
| **GLH:** | 25 |
| **Relationship to NOS:** | Customers Service (2013) National Occupational Standards:<br>• |
| **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 provide knowledge and skills required to build and maintain effective customer relations. Upon completion of this unit, learners will be able to determine the scope for building effective relationships with customers consequently develop effective relationships with customers, and finally review and improve relationships with customers. |

| **Learning outcome** |
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| The learner will:<br>1. Understand how to build effective relationships with customers |
| **Assessment criteria** |
| The learner can:<br>1.1 analyse **stakeholder** mapping techniques<br>1.2 analyse the features of influencing techniques do we need to give examples of techniques here?<br>1.3 explain how influencing techniques can be used to improve the relationship with customers<br>1.4 evaluate the benefits and value of relationships with customers and customer loyalty<br>1.5 explain how techniques to manage expectations are applied to the management of customers<br>1.6 explain different types of **acceptable compromise**<br>1.7 evaluate the benefits of adopting a **"customer-centred"** approach |

| Assessment guidance |
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| **Stakeholders:**<br>Can be a number of people. They will vary according to the organisation eg shareholders, customers, suppliers, other branches, other departments. They are people who have an interest in the organisation and can be affected by its actions. Not all stakeholders are equal.<br><br>**Acceptable compromise:**<br>is where each side arrives at a settlement by making concessions. One side may have to make more of a compromise than others.<br><br>**Customer centred:**<br>is where an organisation has a business approach where it focuses on making client needs and satisfaction a priority.<br><br>**Evidence may be supplied by:**<br>• questioning<br>• professional discussion<br>• reflective account<br>• organisational policies and procedures*<br>• legislative and regulatory requirements*<br>• organisational documentation* |

| Learning outcome |
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| The learner will:<br>2. be able to determine the scope for building effective relationships with customers |
| **Assessment criteria** |
| The learner can:<br>2.1 identify the customers with whom relationships should be developed<br>2.2 identify the interests and concerns of customers with whom relationships should be developed<br>2.3 evaluate the scope for and limitations of building relationships with different types of customer |

| Assessment guidance |
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| **Evidence may be supplied by:**<br>• observation<br>• witness testimony<br>• questioning<br>• professional discussion<br>• reflective account<br>• customer records<br>• report on building and maintaining effective customer relations<br>• organisational policies and procedures*<br>• legislative and regulatory requirements* |

- organisational documentation*

| **Learning outcome** |
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| The learner will:<br>3. be able to develop effective relationships with customers |
| **Assessment criteria** |
| The learner can:<br>3.1 behave in a way that creates mutual trust and respect<br>3.2 provide information and perform actions within agreed timescales<br>3.3 take account of feedback provided by customers<br>3.4 keep customers up to date with new products and/or services and developments<br>3.5 assess regularly the extent to which customers' expectations are met<br>3.6 use personal influence and authority to ensure that customer needs are met or exceeded |

| **Assessment guidance** |
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| **Evidence may be supplied by:**<br>• observation<br>• witness testimony<br>• questioning<br>• professional discussion<br>• reflective account<br>• customer feedback*<br>• customer records<br>• report on building and maintaining effective customer relations<br>• organisational policies and procedures*<br>• legislative and regulatory requirements*<br>• organisational documentation* |

| **Learning outcome** |
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| The learner will:<br>4. be able to review and improve relationships with customers |
| **Assessment criteria** |
| The learner can:<br>4.1 monitor customer relationships and developments<br>4.2 take action to ensure that others complete agreed actions within agreed timescales<br>4.3 address changes to customer service methods that may have an effect on customer relationships<br>4.4 collect feedback from customers on their levels of satisfaction<br>4.5 recommend improvements to customer service based on analyses of the effectiveness of customer relationships. |

**Assessment guidance**

**Evidence may be supplied by:**

- observation
- witness testimony
- questioning
- professional discussion
- reflective account
- customer feedback*
- customer records
- report on building and maintaining effective customer relations
- organisational policies and procedures*
- legislative and regulatory requirements*
- organisational documentation*

Note: here the candidate may prefer to produce a report that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they competently build and maintain effective customer relations over time with a number of customers.

*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.