

# Level 2 NVQ Diploma in Hospitality (7132) – Framework version

## Guidance document/recording forms

Level 2 NVQ Diploma in Front Office Reception (7132-01)

Level 2 NVQ Diploma in Housekeeping (7132-02)



## About City & Guilds

City & Guilds is the UK's leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

## City & Guilds Group

The City & Guilds Group includes City & Guilds, ILM (the Institute of Leadership & Management, which provides management qualifications, learning materials and membership services), City & Guilds NPTC (which offers land-based qualifications and membership services), City & Guilds HAB (the Hospitality Awarding Body), and City & Guilds Centre for Skills Development. City & Guilds also manages the Engineering Council Examinations on behalf of the Engineering Council.

## Equal opportunities

City & Guilds fully supports the principle of equal opportunities and we are committed to satisfying this principle in all our activities and published material. A copy of our equal opportunities policy statement is available on the City & Guilds website.

## Copyright

The content of this document is, unless otherwise indicated, © City & Guilds Limited and may not be copied, reproduced or distributed without prior written consent.

However, approved City & Guilds centres and learners studying for City & Guilds qualifications may photocopy this document free of charge and/or include a PDF version of it on centre intranets on the following conditions:

- 1 centre staff may copy the material only for the purpose of teaching learners working towards a City & Guilds qualification, or for internal administration purposes
- 2 Learners may copy the material only for their own use when working towards a City & Guilds qualification

The *Standard Copying Conditions* (which can be found on the City & Guilds website) also apply.

Please note: National Occupational Standards are not © City & Guilds Limited. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

## Publications

City & Guilds publications are available from our website or from our Publications Sales department, using the contact details shown below.

Every effort has been made to ensure that the information contained in this publication is true and correct at time of publication. However, City & Guilds products and services are subject to continuous development and improvement, and the right is reserved to change products and services from time to time. City & Guilds cannot accept responsibility for any loss or damage arising from the use of information in this publication.

## City & Guilds

**1 Giltspur Street**

**London EC1A 9DD**

**T +44 (0)844 543 0033**

**F +44 (0)20 7294 2413**

**[www.cityandguilds.com](http://www.cityandguilds.com)**

**[learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)**

**Level 2 NVQ Diploma in  
Hospitality (7132) –  
Framework version**

**Guidance document/recording forms**

# Contents

<b>1</b>	<b>About your logbook</b>
1.1	Contact details
1.2	Introduction to the logbook
<b>2</b>	<b>About Framework NVQs and SVQs</b>
<b>2.1</b>	<b>What are NVQs and SVQs?</b>
2.2	The structure of NVQs and SVQs
<b>3</b>	<b>About your centre</b>
3.1	Types of centres
3.2	Assessment roles
<b>4</b>	<b>About N/SVQ Learners</b>
<b>5</b>	<b>The assessment process</b>
5.1	Before you start your N/SVQ
<b>6</b>	<b>Completing your logbook</b>
<b>Your CV</b>	
<b>Skill scan/Initial assessment</b>	
<b>Expert / Witness Status list</b>	
<b>Expert Witness Record</b>	
<b>Summary of Unit Achievement</b>	
<b>7</b>	<b>Units</b>
<b>Appendix 1</b>	<b>Summary of City &amp; Guilds assessment policies</b>
<b>Appendix 2</b>	<b>Observation sheets</b>

# 1 About your logbook

## 1.1 Contact details

<b>Learner name</b>	
<b>Learner enrolment no</b>	
<b>Centre name</b>	
<b>Centre number</b>	
<b>Start date</b>	

Keep a record of relevant contact details in the space provided below. You may find it helpful to make a note of phone numbers and e-mail addresses here.

<b>Your Assessor(s)</b>	
<b>Your Internal Verifier</b>	
<b>Your centre contact</b>	

# 1 About your logbook

## 1.2 Introduction to the logbook

This logbook will help you complete your Qualifications Credit Framework National Vocational Qualification (NVQ) or Scottish Vocational Qualification (SVQ). It contains

- the units you need to achieve to complete your qualification
- information about your responsibilities as a Learner
- forms you can use to record and organise your evidence.

It will also tell you:

- about Framework NVQs and SVQs
- what you need to do to complete your Framework NVQs and SVQs
- who will help you.

### **About City & Guilds**

City & Guilds is your awarding organisation for this qualification. City & Guilds is the UK's leading awarding organisation for vocational qualifications.

Information about City & Guilds and our qualifications is available on our website **[www.cityandguilds.com](http://www.cityandguilds.com)**.

## 2 About Framework NVQs and SVQs

### 2.1 What are NVQs and SVQs?

Framework National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs) are nationally recognised qualifications gained in the workplace or in a realistic working environment. They are based on National Occupational Standards, which are standards written by employers and experts in your industry.

When you achieve your qualification it will prove that you can work to the standards expected by employers in your industry. Your qualification will show you are competent to do a job and have the skills, knowledge and understanding needed to do it well.

N/SVQs are work based qualifications, so you should choose the qualification that best matches the type of work you already carry out, or expect to carry out in the future. If you are not in work, your centre will need to arrange a work placement for you to gain the necessary skills and to be assessed.

### Choosing your qualification

There are different levels of qualifications. The table gives a brief description of the different N/SVQ levels. You don't always have to start at level 1 as you can start at the level that best matches your work or role.

Level	What you have to show to achieve the qualification
1	Achievement at Level 1 reflects the ability to use relevant knowledge, skills and procedures to complete routine tasks. It includes responsibility for completing tasks and procedures subject to direction or guidance.
2	Achievement at level 2 reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well defined tasks and address straight forward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.
3	Achievement at Level 3 reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while well defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgement within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.

## 2 About Framework NVQs and SVQs

### 2.2 The structure of NVQs and SVQs

#### How is an N/SVQ made up?

Each N/SVQ is made up of a number of **units**. Each unit covers a different work activity and a credit value attached to the unit. To achieve the full qualification you have to complete a set number of units outlined within the qualification.

Your centre will explain which units you need to take and help you choose those that best match your job.

#### Mandatory units

You will have to complete all of these units to get your qualification

#### Optional units

You may be able to choose from a number of optional units. You will be helped to choose the best optional units to match your job or interests.

If you are taking an apprenticeship then you must take Unit 666 entitled Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector (PERR/10).

#### Structure of a unit

Units describe what you must be able to do to show you can competently perform activities in your job. Units are broken down into

- **outcomes** – these are either related to tasks you must be able to do or knowledge you must know or understand
- **what you must do** – which describe what you have to do to for each practical task
- **what you must know how to** – describing what you need to know and understand
- **what you must cover/range statements** – describe the situations in which you must be able to perform the tasks

## **3 About your centre**

### **3.1 Types of centres**

Assessment for your qualification will be carried out at your centre. Your centre may be your place of work, a college, training provider or a combination of these.

City & Guilds approves centres to offer qualifications and regularly monitors them to make sure they meet our quality standards and follow our assessment policies.

#### **Centre responsibilities**

Your centre is responsible for the administration of your qualification. Centre staff will

- register you with City & Guilds
- give you your City & Guilds enrolment number
- apply for your certificate(s) when you have completed your N/SVQ or units.

Centres are also responsible for supporting you as you work towards your qualification. Centres will

- carry out an initial assessment with you
- tell you about any learning or training (and resources) you will need to help you complete your qualification
- provide an induction programme to explain how the assessment process works
- produce an assessment plan for you.

## 3 About your centre

### 3.2 Assessment roles

#### Who will be involved in your qualification?

Assessment for your qualification is carried out at your centre. Your centre may be your place of work, a college, training provider or a combination of these. The people involved in the assessment process are listed below.

#### The assessor

This may be your manager or supervisor at work or maybe someone specifically sent into your workplace to carry out the assessment. They will

- carry out an initial assessment of the tasks you do as part of your job role and check these against the qualification content
- observe you carrying out your job over a period of time
- ask you questions about the work you do
- assess when you are competent and meet the national standards

#### The internal verifier

- is employed by your centre to maintain the quality of the occupational assessment

#### The external verifier

- is employed by City & Guilds to ensure that your centre meets the required national standard

#### Witnesses

- Witnesses do not determine your overall competence but may provide evidence of your work for your assessor to judge.

#### Which qualification should you choose?

You should choose an NVQ that best matches the kind of work you already carry out. You don't always have to start at level 1 and the NVQ should reflect the job role that you currently do or intend to do.

#### How is an NVQ made up?

Each NVQ is made up of a number of **units** each covering a different work activity. Each unit also has a credit value, following the qualification rules you must achieve the minimum number of credits required. You will be required to undertake a combination of **mandatory** and **optional** units.

**Mandatory Units** – You will have to achieve all of these to get your NVQ. You may also have to achieve some optional units.

**Optional Units** – You may be able to choose from a number of optional units. You will be helped to choose the best optional units to match your job or interests.

## 4 About N/SVQ Learners

### Learner role and responsibilities

Your responsibilities as a City & Guilds learner are to

- provide your centre with your personal details so you can be registered with City & Guilds
- participate in an initial assessment and induction
- agree a personal assessment plan with your assessor
- collect and organise your evidence as agreed in your assessment plan
- attend regular meetings with your assessor to discuss your progress and to amend your plan when required
- meet with other centre and City & Guilds staff to talk about your qualification and evidence
- make sure you understand and comply with Health and Safety law and regulations
- be clear about your right of appeal if you feel the assessment is not fair

Your centre **may** ask you to agree and sign a learning contract with them to show how you will be assessed for your qualification.

### Learner enrolment number

Make sure you keep a note of your unique City & Guilds enrolment number on the front page of this logbook.

You will need this number again if you take any other City & Guilds qualifications. Using the same enrolment number helps City & Guilds keep a record of every unit and qualification you complete.

### Moving to a new centre

If you change jobs or move to a new centre before you complete your N/SVQ, you may be able to complete it at a new centre. Ask your centre to apply for any certificates of unit credit for you before you leave, and add them to your N/SVQ records.

A new centre will need your Learner Enrolment Number, your assessment records and evidence to help you complete your qualification.

## 5 The assessment process

### 5.1 Before you start your N/SVQ

#### The assessment process

Once you have chosen your units you will make and agree an assessment plan with your assessor. This will show

- the units that the plan covers
- when you will be assessed
- where the assessment will take place
- what you will be doing
- what evidence you will produce

The plan should also indicate the methods of assessment to be used to collect your evidence. For example;

- Observation
- Work product – photographs, videos
- Projects and assignments
- Questioning
- Candidate peer reports
- Witness testimonies
- Expert witness
- Professional discussion
- Simulation – is allowed only where stated in the unit

Your assessor will find tasks which you do and agree the best method of assessment from the above list some tasks will produce evidence for more than one unit. If you don't meet the standards the first time you are assessed, you can take time to improve your skills and be assessed again when you are ready.

You and the assessor will agree what you need to do for each unit and will record this in your assessment and review plan.

## 6 Completing your logbook

### Recording forms

City & Guilds has developed these recording forms, for new and existing centres to use as appropriate. Although it is expected that new centres will use these forms, centres may devise or customise alternative forms, which **must be approved** for use by the **external verifier** before they are used. Alternatively, City & Guilds endorses various electronic e-portfolios.

#### Learner and centre contact details

This form can be used to record candidate and centre details and the NVQ being assessed. It is the first page of the candidate portfolio.

#### CV

This can be used if the candidate does not have an appropriate Curriculum Vitae (CV) for inclusion in the portfolio. The CV helps to indicate “inference of competence over time” by showing what jobs have previously been undertaken by you the learner.

#### Skill scan/Initial assessment

This can be used to record the skills and knowledge which the learner already has as part of an initial action plan.

#### Expert/witness status list

This is used to record the details of all those that have witnessed learner evidence.

#### Expert witness record

This is used to record details of the individual expert witnesses.

#### Unit record

A unit record summaries all the activities and tasks undertaken to complete the unit.

#### Unit assessment and verification declaration

This written declaration should be completed at the end of each unit to meet the QCA requirement for a statement on authenticity. It is signed by the assessor and learner and states that the evidence is authentic and that the assessment was conducted under specified conditions or context.

#### Summary of Unit achievement

The unit declaration sheet can be completed as an ongoing process. Once all the units that make up your qualification have been completed, you along with your assessor must complete the form by signing and dating the declaration statement that all of the evidence meets the required criteria.

#### Please photocopy forms as required

## Your CV

If you already have your own CV you can use that instead of this form.

Name

Address

Telephone Number

Date of birth

Education (school attended and dates)

Qualifications (gained and dates)

Employment history and/or voluntary work

Current work role and main responsibilities

Courses attended in the last 5 years

Interests

# Skill scan/Initial assessment

Level \_\_\_\_ NVQ in \_\_\_\_\_

Credits required to achieve qualification \_\_\_\_\_

Activities undertaken – do you

Mandatory Units – Title	often	sO	bNe	Comments/Action

**Optional units –**


Assessment Site .....

Learner Signature ..... Learner Name (Print) .....

Assessor Signature .....

Date .....



## Expert Witness Record

An Expert Witness has contributed to the evidence included in this learner's Unit Records.

### Expert Witness details

<b>Surname</b>		<b>First name</b>	
----------------	--	-------------------	--

<b>Job title</b>		<b>Name of workplace</b>	
------------------	--	--------------------------	--

<b>Relationship to candidate</b>	manager <input type="checkbox"/> supervisor <input type="checkbox"/>	<b>Subject matter expert: specify:</b> <input type="checkbox"/>
----------------------------------	--	---

I confirm that I fully understand the standards that I will be providing an expert opinion on to confirm the technical competency of the learner.

<b>Witness signature</b>		<b>Date</b>	
--------------------------	--	-------------	--

### Assessor details

<b>Surname</b>		<b>First name</b>	
----------------	--	-------------------	--

I confirm that the Expert Witness, detailed above, is:

*(please tick)*

1. technically competent in all of the areas they will be providing an expert opinion on
2. has been fully briefed on the role of an Expert Witness
3. has been briefed on and understands the occupational standards
4. has been briefed on and understands how to record their evidence

<b>Assessor's signature</b>		<b>Date</b>	
-----------------------------	--	-------------	--

This completed form should be inserted into the front of the learner's Unit Records file

# Unit record Example 1

...IT (O) CICEH

## MAINTAIN A SAFE, HYGIENIC AND SECURE WORKING ENVIRONMENT

### Evidence

\*1 = Ur.eo-f-...ct..c )CUNM! :0 locOTfitt!t-wlllPIMultNhi ftU0cta.D<Jen:: fUf/-./Vr-nt'41TII'fOWtniS.

The diagram features a central vertical axis with several text elements and arrows pointing to it from the surrounding text blocks. At the top, there is a header "O. AMU-". Below this, there are several lines of text, including "1", "0", "01", "2", "vn", and "ro". There are also some symbols and arrows, such as "1", "0", "1", "0", "1", "0", "1", "0", "1", "0".

QuillSAtir:ll  
 Quo3tc:cn to o::kod to filh  
 ;aps ln V>0 laabloHo'anc th<>  
 vnet you mt. st co er 5e<tton.s.  
 |  
 | tor

Uuestl0f16 e&n te OEio.CiUnfIE  
 :lbservalon! entriW.VdS  
 =:torctcl.

Sllp prl Wb'tSf  
 E)ptett'f'itres e)c.a'i be used to  
 pro<Jido oviCenc Or 'ntæncæ:R  
 =>•HIMHM "x c''''''ituf' T'UH  
 oooooo noodo to moko cure  
 that tho quany of lnG tk<lm::>r  
 ls SCJf i lent

NoJii  
 apenA l reu tKtiMa" 'can @  
 pro'lidej;n !!wna:enk:rmst or o,  
 adgna1 t Oice n;coroe

Obcrv tions  
 Obierttidons can bq recrced  
 directlv on the evidence  
 SU''''''''''/s.heats..

111111;  
 the amount: ct ev.ceneg ln ::he  
 e- rvalillfl(":(tn ba \$Umma  
 D::J :he o :::100rio :ceh1 eo:Jly

to meet the evidenee  
 CXIMJ:4HSrt, bul must bE il.If'kiQ,tt  
 '19>-I emen:sct lhe un1t

Work product  
 Can b9 left n 'ltu,lt <los not  
 nt:tt.J IulJ:it i'clutittd in Ittt  
 portfolio. Thio io cD.l!cd  
 (onrouno-

Bpugnlp:r - Goyd P:uGt/G: Nob:  
 It it good prtcticc t: > uGo o rango of  
 rttffInt !=Ourr:aof qvldP.nr.F. Thl  
 should oneble =>Ireemlied app-oacll  
 10 thQ srrnmr:or:JCQSS. as 1t can  
 Sihow tt-at you have gainec; c.cnoeterte  
 ::1'lr a p:ad of time pnor :o the taf  
 -o. S.S!! tdl tit-ti:SilHI

...ndhy - OOf9ti'Witi'VPOrt'TjO(\ Iti'VH <-n,Of)  
 'f\F\>=iCr00CI:Wr V\III'1e S OIV:Od)1ter

# Unit record – Example 2

## MAINTAIN A SAFE, HYGIENIC AND SECURE WORKING ENVIRONMENT

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1	O	Ref Obs 1	TD
2	Q	Ref pages 12 - 13	TD
3	WT	Ref section 1 page 2	TD
4	WP	Ref temperature checks file Chef's office 14.04.10 – 21.04.10	TD

#### Questioning

Questions can be recorded on a separate sheet located somewhere in the portfolio.

#### Expert witness

As per previous example.

#### Referencing

The way in which an assessor references evidence can vary. Assessor may choose to use the terms appendices, ref portfolio referencing.

**Remember** – whatever referencing terms are used they should always be standard throughout each portfolio.

#### Observations

Observations can be recorded elsewhere on centre documents designed for the purpose and stored in a portfolio. Here the box is used to reference where the observational report evidence can be located.

#### Work product

Can be left in situ and signposted, as per previous example.

Photocopy if required

\*Assessment method key: **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**Unit record –  
Example 3**

- UNIT 10111GEN11

**BE ABLE TO MAINTAIN PERSONAL HEALTH  
AND HYGIENE**

What you must do

Y'''''''''''''''' sn0.. >00 you unpolioml  
<Of'Wil.C.,tlyt.o'S.-.11:"-d IWI••  
be ass.eswct bf')OUr to.HS\01"VI0I.IS  
fl nnnl l"(luOf Ol>tt\11)o- of  
y0411 J\* -..I Jll4nU

..... 01 02  
SNdednu,,...n mu.Jt       2 I \*

D Wtar <0t>:"''''''     e e 0 0  
llld \_...-...-  
<loCl>'' loo<wt\*  
andhtadgHr

D Ktop how'''' It'd     - - 0 0  
tdyl'dWO¥K"  
line with  
orteniUUONI  
StMidlfcB

3 Mt•tsurt.,Y            e e 0 0  
jewelry, poriumo 011  
and tosmet.Its worn  
111\*\*INW.cn  
oraenlsefl  
,,,,000

- GttO!lyWts. arozs     0 0 0  
and WOY\dsUHttD  
by''IIPCC>fltt  
P.....

S R',., ''''''''     e e 0 0  
,, , ,  
IOtNippf<lprt  
P''''''''

In this example, the logbook has been cross-referenced to the evidence without the use of the evidence summary sheet

Here the referencing has been kept simple, with each piece of evidence having one number so all assessments are simply numbered and included as appendices within the logbook.

# Summary of Unit Achievement



Certificate/Diploma in \_\_\_\_\_

Level \_\_\_\_\_ Total credit required to achieve \_\_\_\_\_

By signing this summary of unit achievement we are confirming that all learning outcomes for these units have been completed and that evidence is authentic and has been obtained under specified conditions for which certification is now requested.

Learner name: \_\_\_\_\_  
Learner enrolment number: \_\_\_\_\_  
Centre number: \_\_\_\_\_  
(If required)

### Qualification outcomes

### Signatures

Units	Credit	Date achieved	Assessor	Learner	IV (if sampled)

Total Credits Achieved

Note: City & Guilds unit numbers are shown in brackets. These numbers are to be used for results entry purposes, confirming achievement of units for which certification is requested.

## 7 Units

## Level 2 NVQ Diploma in Front of House Reception

To achieve the full qualification candidates must attain a minimum of 37 credits in total.

This comprises of:

- All of the mandatory units (11 credits)
- A minimum of 3 credits from section A
- The remaining 23 credits from either section A or B

### MANDATORY UNITS

		Unit title	Credit value	GLH
1GEN1	101	Maintain a safe, hygienic and secure working environment	3	25
1GEN4	104	Work effectively as part of a hospitality team	3	25
2GEN1	201	Give customers a positive impression of self and your organisation (ICS)	5	33

### SECTION A FRONT OF HOUSE RECEPTION OPTIONAL UNITS

2FOH1	251	Deal with communications as part of the reception function	3	21
2FOH2	252	Deal with arrival of customers	4	32
2FOH3	253	Deal with bookings	4	30
2FOH4	254	Prepare customer accounts and deal with departures	4	30
2FOH11	263	Provide tourism information services to customers	5	50

### SECTION B OPTIONAL UNITS

2FOH5	255	Produce documents in a business environment (CfA)	4	15
2FOH6	256	Use office equipment (CfA)	3	18
2FOH7	257	Communicate in a business environment (CfA)	3	18
2FOH8	260	Handle mail and book external services	3	28
2FOH9	258	Provide reception services (CfA)	3	15
2FOH10	259	Store and retrieve information (CfA)	3	17
2GEN5	261	Resolve customer service problems (ICS)	6	40
2GEN6	273	Promote additional services or products to customers (ICS)	6	40
2GEN7	274	Deal with customers across a language divide (ICS)	8	53
2GEN8	275	Maintain customer service through effective handover (ICS)	4	27
2GEN9	205	Maintain and deal with payments	4	30
PERR	666	Employment rights & responsibilities in the hospitality, leisure, travel and tourism sector	2	16

## Level 2 NVQ Diploma in Housekeeping

To achieve the full qualification candidates must attain a minimum of 37 credits in total.

This comprises of:

- All of the mandatory units (9 credits)
- The remaining 28 credits from section A

### MANDATORY UNITS

		Unit title	Credit value	GLH
1GEN1	101	Maintain a safe, hygienic and secure working environment	3	25
1GEN4	104	Work effectively as part of a hospitality team	3	25
2HK1	264	Cleaning and servicing a range of housekeeping areas	3	28

### SECTION A HOUSEKEEPING OPTIONAL UNITS

1HK1	137	Collect linen and make beds	3	21
1HK2	138	Clean windows from the inside	2	16
2HK2	265	Use of different chemicals and equipment in housekeeping	4	33
2HK3	266	Maintain housekeeping supplies	3	24
2HK4	267	Clean, maintain and protect hard floors (Asset Skills)	4	23
2HK5	268	Clean and maintain soft floors and furnishings (Asset Skills)	4	21
2HK6	269	Providing a linen service	3	25
2HK7	270	Carry out periodic room servicing and deep cleaning	3	27
2GEN1	201	Give customers a positive impression of self and your organisation (ICS)	5	33
2GEN7	274	Deal with customers across a language divide (ICS)	8	53
2GEN8	275	Maintain customer service through effective handover (ICS)	4	27
PERR	666	Employment rights & responsibilities in the hospitality, leisure, travel and tourism sector	2	16

**UNIT 101 (1GEN1)**

**MAINTAIN A SAFE,  
HYGIENIC AND SECURE  
WORKING ENVIRONMENT**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to maintain a safe,  
hygienic and secure working environment**

**August 2010 Version 1.0**



# **MAINTAIN A SAFE, HYGIENIC AND SECURE WORKING ENVIRONMENT**

---

This unit is about basic health, hygiene, safety and security. This includes maintaining a clean and hygienic personal appearance, getting any cuts and grazes treated and reporting illnesses and infections. The unit also covers safety and security in your workplace – helping to spot and deal with hazards and following emergency procedures when necessary

This unit has **four** outcomes:

## **Outcome 1**

Be able to maintain personal health and hygiene

## **Outcome 2**

Know how to maintain personal health and hygiene

## **Outcome 3**

Be able to help maintain a hygienic, safe and secure workplace

## **Outcome 4**

Know how to maintain a hygienic, safe and secure workplace

The typical day-to-day activities you might carry out for this unit include:

- keeping your personal appearance neat, tidy and hygienic
- getting cuts and scratches treated and reporting illnesses
- practising fire and other emergency procedures
- helping to keep your customers, colleagues and visitors safe by dealing with hazards
- working in a healthy and safe way
- maintaining hygiene in your work
- following security procedures

# MAINTAIN A SAFE, HYGIENIC AND SECURE WORKING ENVIRONMENT

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO MAINTAIN PERSONAL HEALTH AND HYGIENE (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Wear clean, smart and appropriate clothing, footwear and headgear	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Keep hair neat and tidy and wear it in line with organisational standards	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Make sure any jewellery, perfume and cosmetics worn are in line with organisational standards	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Get any cuts, grazes and wounds treated by the appropriate person	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Report illness and infections promptly to the appropriate person	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO HELP MAINTAIN A HYGIENIC, SAFE AND SECURE WORKPLACE (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		1	2	3	4
<b>6</b>	Identify any <b>hazards</b> or potential hazards and <b>deal</b> with these correctly	C	C	C	C
<b>7</b>	Report any accidents or near accidents quickly and accurately to the proper person	C	C	C	C
<b>8</b>	Follow health , hygiene and safety procedures during work	C	C	C	C
<b>9</b>	Practise <b>emergency procedures</b> correctly	C	C	C	C
<b>10</b>	Follow organisational security procedures	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Hazards

All must be covered. At least **1** of these must be observed by your assessor.

1	Relating to equipment	C	C	C	C
2	Relating to areas where you work	C	C	C	C
3	Relating to personal clothing	C	C	C	C

### Ways of dealing with hazards

All must be covered. At least **1** of these must be observed by your assessor.

1	Putting them right yourself	C	C	C	C
2	Reporting them to appropriate colleagues	C	C	C	C
3	Warning other people	C	C	C	C

### Emergency procedures

All must be covered. At least **1** of these must be observed by your assessor.

1	Fire	C	C	C	C
2	Threat	C	C	C	C
3	Security	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Know how to maintain personal health and hygiene (OUTCOME 2)

Ref.

K1 State own responsibilities under the Health and Safety at Work Act

K2 State general rules on hygiene that must be followed

K3 State correct clothing, footwear and headgear that should be worn at all times

K4 State the importance of maintaining good personal hygiene

K5 Describe how to deal with cuts, grazes and wounds and why it is important to do so

K12 Describe the type of emergencies that may happen in the workplace and how to deal with these

K13 State where to find first aid equipment and who the registered first-aider is in the workplace

K14 State safe lifting and handling techniques that should be followed

K15 State other ways of working safely that are relevant to own position and why these are important

K16 Describe organisational emergency procedures, in particular fire, and how these should be followed

### Know how to maintain a hygienic, safe and secure workplace (OUTCOME 4)

Ref.

K6 State the importance of working in a healthy, safe and hygienic way

K7 State where information about Health and Safety in your workplace can be obtained

K8 Describe the types of hazard in the workplace that may occur and how to deal with these

K9 State hazards that can be dealt with personally and hazards that must be reported to someone else

K10 State how to warn other people about hazards and why this is important

K11 State why accidents and near accidents should be reported and who these should be reported to

K17 State the possible causes for fire in the workplace

K18 Describe how to minimise the risk of fire

K19 State where to find fire alarms and how to set them off

K20 State why a fire should never be approached unless it is safe to do so

K21 State the importance of following fire safety laws

K22 Describe organisational security procedures and why these are important

K23 State the correct procedures for dealing with customer property

K24 State the importance of reporting all usual/non-routine incidents to the appropriate person

NOTES AND FEEDBACK

Lined writing area consisting of 30 horizontal lines.

**UNIT 104 (1GEN4)**

**WORK EFFECTIVELY AS  
PART OF A HOSPITALITY  
TEAM**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to work effectively  
as part of a hospitality team**

**August 2010 Version 1.0**



# **WORK EFFECTIVELY AS PART OF A HOSPITALITY TEAM**

---

This unit is about making a useful contribution to the work of a team, ie the people you work with. 'Team' includes your line manager or supervisor as well as other people in your team working at the same level as yourself. The unit includes accurately following instructions; working on time; helping others when they need help; communicating with the people you work with; getting feedback on what you do well and where you could improve and continuing to learn and develop yourself.

This unit has **six** outcomes:

**Outcome 1**

Be able to plan and organise own work

**Outcome 2**

Be able to work effectively with team members

**Outcome 3**

Be able to develop own skills

**Outcome 4**

Know how to plan and organise own work

**Outcome 5**

Know how to work effectively with team members

**Outcome 6**

Know how to develop own skills

# WORK EFFECTIVELY AS PART OF A HOSPITALITY TEAM

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which might include observation of your performance, witness testimony or questioning.

## BE ABLE TO PLAN AND ORGANISE OWN WORK

(OUTCOME 1)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Make sure the requirements of the work are understood	C	C	C	C
<b>2</b> Ask questions if the requirements of the work are not clear	C	C	C	C
<b>3</b> Accurately follow instructions	C	C	C	C
<b>4</b> Plan work and prioritise tasks in order of importance	C	C	C	C
<b>5</b> Keep everything needed for the work organised and available	C	C	C	C
<b>6</b> Keep work areas clean and tidy	C	C	C	C
<b>7</b> Keep waste to a minimum	C	C	C	C
<b>8</b> Ask for help from the relevant person if it is needed	C	C	C	C
<b>9</b> Provide work on time and as agreed	C	C	C	C

## BE ABLE TO WORK EFFECTIVELY WITH TEAM MEMBERS

(OUTCOME 2)

Shaded numbers must be observed	1	2	3	4
<b>10</b> Give team members help when they ask for it	C	C	C	C
<b>11</b> Ensure the help given to team members is within the limits of own job role	C	C	C	C
<b>12</b> Ensure the help given to team members does not prevent own work being completed on time	C	C	C	C
<b>13</b> Pass on important information to team members as soon as possible	C	C	C	C
<b>14</b> Maintain good working relationships with team members	C	C	C	C
<b>15</b> Report any problems with working relationships to the relevant person				
<b>16</b> Communicate clearly and effectively with team members				

## BE ABLE TO DEVELOP OWN SKILLS

(OUTCOME 3)

Shaded numbers must be observed		1	2	3	4
<b>17</b>	Seek feedback on own work and deal with this feedback positively	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>18</b>	Identify with the relevant person aspects of own work which are up to standard and areas that could be improved	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>19</b>	Agree what has to be done to improve their work	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>20</b>	Agree a learning plan with the relevant person	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>21</b>	Seek opportunities to review and develop learning plan	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Know how to plan and organise own work (OUTCOME 4) Ref.

K1. State why it is essential to understand the requirements of the work

K2. List the benefits of planning and organising work

K3. Describe how to make the most efficient use of time and avoid things that may cause unnecessary disruptions

K4. List the benefits of keeping everything needed for own work organised and available

K5. State why it is important to keep work areas clean and tidy

K6. State why it is important to keep waste to a minimum

K7. State when to ask for help and who can be asked

### Know how to work effectively with team members (OUTCOME 5) Ref.

K9. State the importance of effective teamwork

K10. State the people in own team and explain how they fit into the organisation

K11. List the responsibilities of the team and why it is important to the organisation as a whole

K12. Describe how to maintain good working relationships with team members

K13. State how to determine if helping

a team member will prevent own work from being completed on time

K14. State the limits of own job role and what can and cannot be done when helping team members

K15. State why essential information needs to be passed on to a team member as soon as possible

K16. List the types of behaviour that help teams to work effectively and behaviours that do not

K17. State why problems with working relationships should be reported to the relevant person

K18. Describe how to communicate clearly and why it is important to do so

### Know how to develop own skills (OUTCOME 6) Ref.

K19. State the importance of improving own knowledge and skills

K20. Describe how to get feedback from team members and how this is helpful

K21. Describe how a learning plan can improve own work

K22. State why it is important to regularly review own learning plan



**UNIT 137 (1HK1)**

**COLLECT LINEN AND  
MAKE BEDS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to collect linen and  
make beds**

**August 2010 Version 1.0**



## **COLLECT LINEN AND MAKE BEDS**

---

This unit is about stripping and making beds, handling linen and bed coverings, as well as collecting bed coverings and moving them to the rooms.

This unit has **four** outcomes:

**Outcome 1**

Be able to collect clean linen and bed coverings

**Outcome 2**

Understand how to collect clean linen and bed coverings

**Outcome 3**

Be able to strip and make beds

**Outcome 4**

Know how to strip and make beds

The typical day-to-day activities you might carry out for this unit include:

- collecting clean linen and bed coverings from the linen store
- checking that linen and bed coverings meet your organisation's standards
- stripping beds
- making beds
- dealing with soiled linen

## COLLECT LINEN AND MAKE BEDS

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO COLLECT CLEAN LINEN AND BED COVERINGS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b>	Choose and collect the <b>linen and bed coverings</b> needed for work schedule	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b>	Make sure the linen and bed coverings meet organisational standards	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b>	Handle and move the linen and bed coverings safely	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b>	Keep linen store safe and secure	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Linen and bed coverings

All must be covered. At least **5** of these must be observed by your assessor.

1	Sheets	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Blankets/duvets	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Bedspreads/throws	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Pillow cases/sheet	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
5	Waterproof sheets	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
6	Valances	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
7	Mattress protectors	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
8	Duvets/pillows	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
9	Bathroom linen	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO STRIP AND MAKE BEDS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

	1	2	3	4
<b>Shaded numbers must be observed</b>				
<b>5</b> Strip all <b>linen and bed coverings</b> from beds	C	C	C	C
<b>6</b> Handle and store soiled linen and bed coverings correctly	C	C	C	C
<b>7</b> Get <b>bed</b> ready for making	C	C	C	C
<b>8</b> Make sure the bed base, bed head, linen and bed coverings are clean and not damaged	C	C	C	C
<b>9</b> Make the bed to premises standards with the correct linen and bed coverings	C	C	C	C
<b>10</b> Leave bed neat, smooth and ready for use	C	C	C	C
<b>11</b> Deal with <b>customers'</b> personal property according to organisational procedures	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Linen and bed coverings

All must be covered. At least **5** of these must be observed by your assessor.

1	Sheets	C	C	C	C
2	Blankets/duvets	C	C	C	C
3	Bedspreads/throws	C	C	C	C
4	Waterproof sheets	C	C	C	C
5	Valances	C	C	C	C
6	Mattress protectors	C	C	C	C
7	Duvets/pillows pillowcases/sheets	C	C	C	C

### Beds

All must be covered. At least **1** of these must be observed by your assessor.

1	Double/single beds	C	C	C	C
2	Cots/folding beds	C	C	C	C
3	Zip and link	C	C	C	C
4	Sofa beds	C	C	C	C

### Customers

All must be covered. At least **1** of these must be observed by your assessor.

1	new	C	C	C	C
2	stay over	C	C	C	C

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand how to collect clean linen and bed coverings</b> (OUTCOME 2)	<b>Ref.</b>	<b>Know how to strip and make beds</b> (OUTCOME 4)	<b>Ref.</b>
K1 Describe safe lifting and handling techniques and why they should always be used		K7 State the correct way to deal with soiled linen	
K2 State organisational standards for collection of linen and bed coverings		K8 State the right way to sort different fabrics	
K3 State why soiled linen should be kept separate from clean linen		K9 State organisation's procedures for making and re-sheeting beds	
K4 State why linen and linen store must be secure		K10 State why it is important to use the right sized linen	
K5 State why it is important to check linen to make sure it is clean and up to standard		K11 Outline the types of unexpected situations – including customer incidents – that may happen when stripping and making beds and how to deal with them	
K6 Outline the types of problems that may happen when choosing and collecting linen from the linen store and how to deal with them		K12 Describe how to spot and what procedures to use if encountering bedbugs or other infestations	



**UNIT 138 (1HK2)**

**CLEAN WINDOWS FROM  
THE INSIDE**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to clean windows  
from the inside**

**August 2010 Version 1.0**



## **CLEAN WINDOWS FROM THE INSIDE**

---

This unit is about cleaning the inside surfaces of windows, using appropriate cleaning equipment and materials. The unit does not require you to work above hand reach height.

This unit has **four** outcomes:

**Outcome 1**

Be able to prepare to clean windows from inside

**Outcome 2**

Know how to prepare to clean windows from inside

**Outcome 3**

Be able to clean the inside surface of windows

**Outcome 4**

Know how to clean the inside surface of windows

The typical day-to-day activities you might carry out for this unit include:

- preparing windows and surrounding areas for cleaning
- wearing protective clothing
- choosing appropriate chemicals and equipment for the type of dirt on the window
- cleaning the windows and frames
- drying windows and frames
- putting the area back as you found it

## CLEAN WINDOWS FROM THE INSIDE

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO PREPARE TO CLEAN WINDOWS FROM INSIDE

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

Shaded numbers must be observed	1	2	3	4
<b>1</b> Prepare working area and equipment	C	C	C	C
<b>2</b> Inspect the <b>surface</b> to be cleaned	C	C	C	C
<b>3</b> Identify any damaged or loose <b>surfaces</b>	C	C	C	C
<b>4</b> Report damaged or loose surfaces to the relevant person and ask for advice	C	C	C	C
<b>5</b> Choose cleaning <b>materials</b> and methods that are appropriate to the work schedule, the type of <b>dirt</b> and the surface to be cleaned	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Preparation of work area

All must be covered. At least **2** of these must be observed by your assessor.

1	Use of protective clothing	C	C	C	C
2	Put up hazard warning signs	C	C	C	C
3	Protect surrounding areas	C	C	C	C

### Surfaces

All must be covered. At least **2** of these must be observed by your assessor.

1	Windows	C	C	C	C
2	Window frames	C	C	C	C

### Equipment and materials

All must be covered. At least **2** of these must be observed by your assessor.

1	Cloths	C	C	C	C
2	Cleaning chemicals	C	C	C	C
3	Squeegees	C	C	C	C

### Dirt

All must be covered. At least **1** of these must be observed by your assessor.

1	Loose dirt	C	C	C	C
2	Dirt that is hard to remove	C	C	C	C

# BE ABLE TO CLEAN THE INSIDE SURFACE OF WINDOWS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>6</b> Apply the cleaning agent to the <b>surface</b> in a controlled way, following the manufacture's instructions and recommendations	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Loosen <b>dirt</b> that is stuck on to the surface without causing damage	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Clean thoroughly and remove any dirt without damaging the surface	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Report any dirt that you cannot remove to the relevant person	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Leave windows and glass dry and smear free	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>11</b> Make sure that frames and sills are dry	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>12</b> Put the work area back as found	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Surfaces

All must be covered. At least **2** of these must be observed by your assessor.

1	Windows	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Frames	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

### Dirt

All must be covered. At least **1** of these must be observed by your assessor.

1	Loose dirt	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Dirt that is hard to remove	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Know how to prepare to clean windows from inside</b> (OUTCOME 2)	<b>Ref.</b>	<b>Know how to clean the inside surface of windows</b> (OUTCOME 4)	<b>Ref.</b>
K1 State organisation's standards for cleaning windows		K11 State why dirt that cannot be removed should be reported	
K2 State how frequently windows should be cleaned		K12 State why frames and sills should be left dry	
K3 State why protective clothing should be worn when cleaning			
K4 State why cleaning materials should not be mixed			
K5 State why manufacturers' instructions should be followed when using cleaning equipment and materials			
K6 Outline the types of problems that occur when cleaning windows and how to deal with them			
K7 State what to do if window areas are above hand reach height			
K8 State why it is important to prepare windows and surrounding areas for cleaning			
K9 State why loose or damaged surfaces should be identified and reported			
K10 State the types of equipment and materials that should be used for loose dirt and dirt that is hard remove			



**UNIT 201 (2GEN1)**

**GIVE CUSTOMERS A  
POSITIVE IMPRESSION  
OF YOURSELF AND YOUR  
ORGANISATION**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to give customers a  
positive impression of yourself and your  
organisation**

**August 2010 Version 1.0**



# **GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION**

---

This unit is about communicating with customers to give a positive impression of yourself and your organisation. It involves giving customers the right impression, responding to their needs and providing helpful information.

This unit has **four** outcomes:

**Outcome 1**

Establish rapport with customers

**Outcome 2**

Respond appropriately to customers

**Outcome 3**

Communicate information to customers

**Outcome 4**

Understand how to give customers a positive impression of themselves and the organisation

# GIVE CUSTOMERS A POSITIVE IMPRESSION OF YOURSELF AND YOUR ORGANISATION

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**ESTABLISH RAPPORT WITH CUSTOMERS**

(OUTCOME 1)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Meet their organisation's standards of appearance and behaviour	C	C	C	C
<b>2</b> Greet their customer respectfully and in a friendly manner	C	C	C	C
<b>3</b> <b>Communicate with their customer</b> in a way that makes them feel valued and respected	C	C	C	C
<b>4</b> Identify and confirm their customer's expectations	C	C	C	C
<b>5</b> Treat their customer courteously and helpfully at all times	C	C	C	C
<b>6</b> Keep their customer informed and reassured	C	C	C	C
<b>7</b> Adapt their behaviour to respond to different customer behaviour	C	C	C	C

**RESPOND APPROPRIATELY TO CUSTOMERS** (OUTCOME 2)

<b>8</b> Respond promptly to a customer seeking help	C	C	C	C
--	---	---	---	---

**What you must cover**

You must show that you have covered **ALL** of the following:

**Creating a positive impression with customers**

All must be covered.

1	During routine delivery of customer service	C	C	C	C
2	During a busy time in your job	C	C	C	C
3	During a quiet time in your job	C	C	C	C
4	When people, systems or resources have let you down	C	C	C	C

**Communicate with customers effectively**

All must be covered.

1	Using appropriate spoken or written language	C	C	C	C
2	Applying the conventions and rules appropriate to the method of communication you have chosen	C	C	C	C

<b>9</b>	Choose the most appropriate way to communicate with their customer	<b>C C C C C</b>
<b>10</b>	Check with their customer that they have fully understood their expectations	<b>C C C C C</b>
<b>11</b>	Respond promptly and positively to their customer's questions and comments	<b>C C C C C</b>
<b>12</b>	Allow their customer time to consider their response and give further explanation when appropriate	<b>C C C C C</b>

## **COMMUNICATE INFORMATION TO CUSTOMERS** (OUTCOME 3)

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	
<b>13</b>	Quickly find information that will help their customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>14</b>	Give their customer information they need about the services or products offered by their organisation	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>15</b>	Recognise information that their customer might find complicated and check whether they fully understand	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>16</b>	Explain clearly to their customers any reasons why their expectations cannot be met	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### **Understand how to give customers Ref. a positive impression of themselves and the organisation** (OUTCOME 4)

---

- K1 Describe their organisation's standards for appearance and behaviour

---

- K2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately

---

- K3 Identify their organisation's rules and procedures regarding the methods of communication they use

---

- K4 Explain how to recognise when a customer is angry or confused

---

- K5 Identify their organisation's standards for timeliness in responding to customer questions and requests for information

---



**UNIT 205 (2GEN9)**

## **MAINTAIN AND DEAL WITH PAYMENTS**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to maintain and deal with payments**

**August 2010 Version 1.0**



## **MAINTAIN AND DEAL WITH PAYMENTS**

---

This unit is about maintaining a payment point such as a till. It also covers taking payments from the customer, operating the till correctly and keeping payments safe and secure.

This unit has **two** outcomes:

### **Outcome 1**

Be able to maintain and deal with payments

### **Outcome 2**

Know how to maintain and deal with payments

# MAINTAIN AND DEAL WITH PAYMENTS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO MAINTAIN AND DEAL WITH PAYMENTS

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

Shaded numbers must be observed	1	2	3	4
<b>1</b> Make sure <b>payment</b> point is working and that all <b>materials</b> needed are available	C	C	C	C
<b>2</b> Maintain the payment point and restock it when necessary	C	C	C	C
<b>3</b> Enter/scan information into the payment point correctly	C	C	C	C
<b>4</b> Tell the customer how much they have to pay	C	C	C	C
<b>5</b> Acknowledge the customer's payment and validate it where necessary	C	C	C	C
<b>6</b> Follow correct procedure for chip and pin transactions	C	C	C	C
<b>7</b> Put the payment in the right place according to organisational procedures	C	C	C	C
<b>8</b> Give correct change for cash transactions	C	C	C	C
<b>9</b> Carry out transactions without delay and give relevant confirmation to the customer	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Materials

All must be covered. At least **2** of these must be observed by your assessor.

1	Cash	C	C	C	C
2	Cash equivalents	C	C	C	C
3	Relevant stationary	C	C	C	C
4	Till/credit/debit rolls	C	C	C	C

### Payments

All must be covered. At least **2** of these must be observed by your assessor.

1	Cash	C	C	C	C
2	Cheques	C	C	C	C
3	Credit cards	C	C	C	C
4	Debit cards	C	C	C	C
5	Cash equivalents	C	C	C	C

---

Make the payment  
point content  
available for  
authorised collection  
when ask to

---



## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Know how to maintain and deal with payments (OUTCOME 2)

#### Ref.

K1 State the legal requirements for operating a payment point and taking payments from customers

K2 Describe organisational security procedures for cash and other types of payments

K3 Describe how to set up a payment point

K4 Describe how to get stocks of materials needed to set up and maintain the payment point

K5 State the importance of telling the customer of any delays and how to do so

K6 Describe the types of problems that might happen with a payment point and how to deal with these

K7 Describe how to change till/debit/credit machine rolls

K8 Describe the correct procedures for handling payments

K9 Describe what to do if there are errors in handling payments

K10 Describe the procedures for dealing with hand held payment devices at tables

K11 State what procedure must be followed with regards to a payment that has been declined

K12 State what might happen if errors are not reported

K13 Describe the types of problems that may happen when taking payments and how to deal with these

K14 Describe the procedure for collecting the content of payment point and who should hand payments over to



**UNIT 251 (2FOH1)**

**DEAL WITH  
COMMUNICATIONS AS  
PART OF THE RECEPTION  
FUNCTION**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to deal with communications as part of the reception function**

**August 2010 Version 1.0**



## **DEAL WITH COMMUNICATIONS AS PART OF THE RECEPTION FUNCTION**

---

This unit is about dealing with incoming communications, for example taking telephone calls and emails, and taking accurate messages and passing them on. It also covers dealing with outgoing communications, for example making telephone calls and leaving messages where appropriate.

This unit has **four** outcomes:

### **Outcome 1**

Be able to deal with incoming communications

### **Outcome 2**

Know how to deal with incoming communications

### **Outcome 3**

Be able to deal with outgoing communications

### **Outcome 4**

Know how to deal with outgoing communications

# DEAL WITH COMMUNICATIONS AS PART OF THE RECEPTION FUNCTION

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO DEAL WITH INCOMING COMMUNICATIONS

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b>	Deal with <b>communications</b> promptly, politely and in line with organisational style	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b>	Identify the person, find out what their needs are and deal with these correctly	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b>	Answer <b>enquiries</b> accurately without giving any confidential information	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b>	Record clear and accurate messages and pass them on as requested	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b>	Deal correctly with any problems	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Communications

All must be covered. All of these must be observed by your assessor.

1	By telephone	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	By letter or fax	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Using email	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

### Enquiries

All must be covered. **Both** of these must be observed by your assessor.

1	Those you can deal with yourself	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Those that need to be passed/transferred to another person/department	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO DEAL WITH OUTGOING COMMUNICATIONS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

### Shaded numbers must be observed

	1	2	3	4
<b>6</b> Choose the best <b>method of communication</b> with the person concerned	C	C	C	C
<b>7</b> Use organisation's agreed style	C	C	C	C
<b>8</b> Communicate in a way that gives a positive impression of self and the organisation	C	C	C	C
<b>9</b> State personal identity and explain the reason why contact is being made	C	C	C	C
<b>10</b> Give only non-confidential and relevant information to the person that has been contacted	C	C	C	C
<b>11</b> Leave clear and accurate messages where needed	C	C	C	C
<b>12</b> Deal with any problems correctly	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Methods of communication

All must be covered. All of these must be observed by your assessor.

1	By telephone	C	C	C	C
2	By letter or fax	C	C	C	C
3	Using email	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Know how to deal with incoming communications (OUTCOME 2)

Ref.

K1 State the range of methods of communication that can be used to communicate with other organisations and people

K2 Describe how to use the communication equipment in organisation

K3 State organisational style when communicating with other organisations and people

K4 State why it is important to deal with everyone politely and helpfully

K5 Outline the types of unexpected situations and problems that may occur when communicating with others, and how to deal with these

K6 State why it is important to give only accurate and non-confidential information

K7 State organisational standards for answering telephone calls, and why these are important

K8 State why it is important to identify people who make enquiries and establish their needs

K9 State why it is important to relay messages promptly to those concerned, and the procedures that should be followed

### Know how to deal with outgoing communications (OUTCOME 4)

Ref.

K10 State the importance of stating personal identity and explaining the purpose of making contact

K11 State why it is important to give only accurate and non-confidential information

K12 State why it is important to communicate clearly, using a tone and pace that can be easily understood

K13 Describe how to communicate both orally and in writing, in a way that gives a positive impression of self and the organisation



**UNIT 252 (2FOH2)**

## **DEAL WITH ARRIVAL OF CUSTOMERS**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to deal with arrival of customers**

**August 2010 Version 1.0**



## **DEAL WITH ARRIVAL OF CUSTOMERS**

---

This unit is about dealing with the arrival of customers, processing their registration documents and promoting the products and services of the organisation. Dealing with the arrival of customers is a vital part of the Front of House role. You are likely to be one of the first people the customer will meet, and you need to portray a professional, efficient and helpful image from the start.

This unit has **two** outcomes:

### **Outcome 1**

Be able to deal with the arrival of customers

### **Outcome 2**

Know how to deal with the arrival of customers

## DEAL WITH ARRIVAL OF CUSTOMERS

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO DEAL WITH THE ARRIVAL OF CUSTOMERS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Correctly identify <b>customer</b> requirements	C	C	C	C
<b>2</b> Retrieve any customer booking details from the <b>booking system</b> and check them with the customer	C	C	C	C
<b>3</b> Offer alternatives for any services that are not available as requested	C	C	C	C
<b>4</b> Complete the registration document correctly	C	C	C	C
<b>5</b> Give accurate <b>information</b> which meets customer needs	C	C	C	C
<b>6</b> Promote the <b>services and facilities</b> of organisation when appropriate	C	C	C	C
<b>7</b> Pass on customer details to the relevant departments in line with organisation's procedures	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Customers

All must be covered. At least **1** of these must be observed by your assessor.

1	Customers with routine requirements	C	C	C	C
2	Customers with special requirements	C	C	C	C
3	Customers without advanced bookings	C	C	C	C

### Booking systems

All must be covered. At least **1** of these must be observed by your assessor.

1	Computerised system	C	C	C	C
2	Manual system	C	C	C	C

### Information to customers

All must be covered. At least **4** of these must be observed by your assessor.

1	Location of room	C	C	C	C
2	Key security and safety procedures	C	C	C	C
3	Services and facilities available	C	C	C	C
4	Prices	C	C	C	C
5	Special offers and promotions available	C	C	C	C

### Services and facilities

All must be covered. At least **1** of these must be observed by your assessor.

1	Business facilities	C	C	C	C
2	Leisure facilities	C	C	C	C
3	Food and beverage facilities	C	C	C	C

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### **Know how to deal with the arrival of customers** (OUTCOME 2) **Ref.**

---

K1 State organisation's standards for customer care and why these are important

---

K2 State organisation's booking procedures, and why it is important to follow these correctly

---

K3 State organisation's checking in procedures, and why it is important to follow these

---

K4 State basic legal requirements relating to accommodation, goods and services for sale

---

K5 Outline the types of unexpected situations and problems that may occur when customers arrive, and how to deal with these

---

K6 State why registration documentation must be correctly completed by the customer

---

K7 State the specific requirements for registering overseas visitors

---

K8 State the organisation's procedure for allocation of rooms

---

K9 State why it is important to give accurate information to customers

---

K10 State why it is important to correctly identify customers' requirements

---

K11 State what registration information must be obtained in order to comply with legislation

---

K12 State why all correspondence relating to the booking should be available

---



**UNIT 253 (2FOH3)**

## **DEAL WITH BOOKINGS**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to deal with bookings**

**August 2010 Version 1.0**



## **DEAL WITH BOOKINGS**

---

This unit is about handling booking enquiries and taking bookings from customers. It also covers making amendments (for example, of date and time) to bookings, and keeping records up to date.

This unit has **four** outcomes:

**Outcome 1**

Be able to deal with booking enquiries

**Outcome 2**

Know how to deal with booking enquiries

**Outcome 3**

Be able to confirm, cancel and amend bookings

**Outcome 4**

Know how to confirm, cancel and amend bookings

# DEAL WITH BOOKINGS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO DEAL WITH BOOKING ENQUIRIES

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Be polite and helpful when dealing with enquiries	C	C	C	C
<b>2</b> Find out what the <b>customer</b> needs and give them accurate <b>information</b>	C	C	C	C
<b>3</b> Take the opportunity to sell other products and services to the customer	C	C	C	C
<b>4</b> Invite the customer to make a booking, and take and record their details correctly	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Customers

All must be covered. At least **1** of these must be observed by your assessor.

1	With routine requests	C	C	C	C
2	With special needs	C	C	C	C

### Enquiries

All must be covered. At least **3** of these must be observed by your assessor.

1	Face-to-face	C	C	C	C
2	Telephone	C	C	C	C
3	Letter or fax	C	C	C	C
4	Email	C	C	C	C
5	On-line booking systems	C	C	C	C

### Information

All must be covered. At least **2** of these must be observed by your assessor.

1	Services and facilities available	C	C	C	C
2	Features and benefits or services and facilities	C	C	C	C
3	Prices	C	C	C	C
4	Special offers and promotions available	C	C	C	C

# BE ABLE TO CONFIRM, CANCEL AND AMEND BOOKINGS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		1	2	3	4
<b>5</b>	Deal with confirmations in the <b>booking systems</b>	C	C	C	C
<b>6</b>	Identify, check and follow up unconfirmed bookings in the booking system	C	C	C	C
<b>7</b>	Deal with <b>booking amendments and cancellations</b> and maintain records of bookings in line with organisation's procedures	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Customer

All must be covered. At least **1** of these must be observed by your assessor.

1	With routine requests	C	C	C	C
2	With special needs	C	C	C	C

### Booking systems

All must be covered. At least **1** of these must be observed by your assessor.

1	Computerised systems	C	C	C	C
2	Manual systems	C	C	C	C
3	On-line systems	C	C	C	C

### Booking amendments and cancellations

All must be covered. At least **1** of these must be observed by your assessor.

1	Change bookings	C	C	C	C
2	Cancel bookings	C	C	C	C

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

---

### **Know how to deal with booking enquiries** (OUTCOME 2)

---

**Ref.**

- 
- K1 State the importance of dealing with customers politely and helpfully at all times
- 
- K2 State why it is important to give accurate spoken and written information to customers
- 
- K3 Outline the types of unexpected situations and problems that may occur with bookings, and how to deal with these
- 
- K4 State basic legal requirements relating to goods and services for sale when receiving, confirming, amending and cancelling booking enquiries
- 
- K5 Describe organisation's booking procedures and systems
- 
- K6 State the importance of up-selling, room/product rates and yield management and how these apply to own work role
- 
- K7 State why it is important to get and record booking details accurately
- 
- K8 State why it is important to take the opportunity to sell products and services

---

### **Know how to confirm, cancel and amend bookings** (OUTCOME 4)

---

**Ref.**

- 
- K9 State organisation's cancellation policies and procedures
- 
- K10 State why confirmations and deposits are required from customers
- 
- K11 State why it is essential to follow up unconfirmed bookings
-



**UNIT 254 (2FOH4)**

**PREPARE CUSTOMER  
ACCOUNTS AND DEAL  
WITH DEPARTURES**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to prepare  
customer accounts and deal with  
departures**

**August 2010 Version 1.0**



# **PREPARE CUSTOMER ACCOUNTS AND DEAL WITH DEPARTURES**

---

This unit is about maintaining customer accounts by entering charges and adjustments onto the account. It also covers dealing with departing customers by completing the relevant documentation and procedures, and recording customer comments.

This unit has **four** outcomes:

**Outcome 1**

Be able to prepare and maintain customer accounts

**Outcome 2**

Understand how to prepare and maintain customer accounts

**Outcome 3**

Be able to deal with the departure of customers

**Outcome 4**

Understand how to deal with the departure of customers

# PREPARE CUSTOMER ACCOUNTS AND DEAL WITH DEPARTURES

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO PREPARE AND MAINTAIN CUSTOMER ACCOUNTS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Enter charges regularly and accurately against customer accounts in the <b>accounts system</b>	C	C	C	C
<b>2</b> Record any <b>account adjustments</b> accurately against customer accounts	C	C	C	C
<b>3</b> File and store account documents correctly at all times	C	C	C	C
<b>4</b> Present accounts to customer	C	C	C	C
<b>5</b> Make sure customer accounts cannot be accessed by unauthorised people	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Account systems

All must be covered. At least **1** of these must be observed by your assessor.

1	Computerised systems	C	C	C	C
2	Manual systems	C	C	C	C
3	On-line systems	C	C	C	C

### Account adjustments

All must be covered. At least **2** of these must be observed by your assessor.

1	Charges	C	C	C	C
2	Allowances/ discounts	C	C	C	C
3	Refunds	C	C	C	C
4	Deposits/ pre-payments	C	C	C	C
5	Transfers	C	C	C	C

# BE ABLE TO DEAL WITH THE DEPARTURE OF CUSTOMERS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		1	2	3	4
<b>6</b>	Prepare documents and other necessary items before the customer departs	C	C	C	C
<b>7</b>	Present the account to the customer for confirmation	C	C	C	C
<b>8</b>	Check <b>customer account</b> details and request payment as required	C	C	C	C
<b>9</b>	Complete documentation and deal with it using the correct <b>account or booking system</b>	C	C	C	C
<b>10</b>	Complete all other procedures for customer departures	C	C	C	C
<b>11</b>	Record customer comments, complaints and suggestions and feed them back to appropriate person or department	C	C	C	C
<b>12</b>	Promote establishment services and facilities as appropriate	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Customer account

All must be covered. At least **2** of these must be observed by your assessor.

1	Those where part payment is required	C	C	C	C
2	Those where full payment is required	C	C	C	C
3	Those where the account does not require immediate settlement	C	C	C	C

### Account or booking system

All must be covered. At least **1** of these must be observed by your assessor.

1	Computerised	C	C	C	C
2	Manual	C	C	C	C
3	On-line systems	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to prepare and maintain customer accounts (OUTCOME 2)

Ref.

K1 Describe organisational standards for customer care, and why it is important to follow these

K2 State the basic legal requirements relating to preparing and maintaining customer accounts

K3 Describe organisational procedures for customer accounts, and why it is important to follow these

K4 Explain why customer accounts must be updated regularly with charges and adjustments

K5 State why it is important to give accurate verbal and written information to customers

K6 State why customer accounts must be secure from unauthorised access

K7 Outline the types of unexpected situations and problems that may occur with customer accounts, and how to deal with these correctly

K11 State why complaints, comments and suggestions should be recorded and fed back to the appropriate person

K12 State why details of any extra charges should be available to the customer

K13 Outline the types of unexpected situations and problems that may occur with customer departures and how to deal with these correctly

K14 Describe opportunities to promote the organisation when the customer is leaving

### Understand how to deal with the departure of customers (OUTCOME 4)

Ref.

K8 State the basic legal requirements relating to accommodation, goods and services for sale

K9 Describe safe and hygienic working practices when dealing with the departure of customers

K10 State organisational procedures for customer departures



**UNIT 255 (2FOH5)**

**PRODUCE DOCUMENTS  
IN A BUSINESS  
ENVIRONMENT**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to produce  
documents in a business environment**

**August 2010 Version 1.0**



# **PRODUCE DOCUMENTS IN A BUSINESS ENVIRONMENT**

---

This unit is about producing high-quality, attractive documents to agreed specifications using the following specific skills:

- checking
- designing
- listening
- managing time
- negotiating
- organising
- questioning
- using technology
- writing

This unit has **five** outcomes:

## **Outcome 1**

Understand the purpose of producing high-quality and attractive documents in a business environment

## **Outcome 2**

Know the resources and technology available and how to use them when producing documents in a business environment

## **Outcome 3**

Understand the purpose of following procedures when producing documents in a business environment

## **Outcome 4**

Be able to prepare for tasks

## **Outcome 5**

Be able to produce documents to agreed specifications

# PRODUCE DOCUMENTS IN A BUSINESS ENVIRONMENT

---

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**BE ABLE TO PREPARE FOR TASKS** (OUTCOME 4)

**Shaded numbers must be observed**      1   2   3   4

- |          |   |          |          |          |          |
|----------|---|----------|----------|----------|----------|
| <b>1</b> | Confirm the purpose, content, style and deadlines for documents | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
|----------|---|----------|----------|----------|----------|

**BE ABLE TO PRODUCE DOCUMENTS TO AGREED SPECIFICATIONS** (OUTCOME 5)

**Shaded numbers must be observed**      1   2   3   4

- |          |   |          |          |          |          |
|----------|---|----------|----------|----------|----------|
| <b>2</b> | Prepare resources needed to produce documents                 | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>3</b> | Organise the content required to produce documents            | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>4</b> | Make use of technology, as required                           | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>5</b> | Format and produce documents to an agreed style               | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>6</b> | Integrate non-text objects into an agreed layout, if required | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>7</b> | Check texts for accuracy                                      | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>8</b> | Edit and correct texts, as required                           | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |

- |           |  |          |          |          |          |
|-----------|--|----------|----------|----------|----------|
| <b>9</b>  | Clarify document requirements, when necessary                            | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>10</b> | Store documents safely and securely following organisational procedures  | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>11</b> | Present documents to the required format and within the agreed deadlines | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand the purpose of producing high-quality and attractive documents in a business environment (OUTCOME 1)

Ref.

K1 Outline different types of documents that may be produced and the different styles that could be used

K2 Describe different formats in which text may be presented

K3 Explain the purpose and benefits of producing high-quality and attractive documents

### Know the resources and technology available and how to use them when producing documents in a business environment (OUTCOME 2)

Ref.

K4 Describe the types of resources available for producing high-quality and attractive documents

K5 Outline ways of using different resources to produce documents

K6 Describe different types of technology available for inputting, formatting and editing text, and their main features

### Understand the purpose of following procedures when producing documents in a business environment (OUTCOME 3)

Ref.

K7 Explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents

K8 Outline different ways of organising content needed for documents

K9 Outline ways of integrating and laying out text and non-text

K10 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so

K11 Explain the purpose of storing documents safely and securely, and ways of doing so

K12 Explain the purpose of confidentiality and data protection when preparing documents

K13 Explain the purpose and benefits of meeting deadlines



**UNIT 256 (2FOH6)**

## **USE OFFICE EQUIPMENT**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to use office equipment**

**August 2010 Version 1.0**



## **USE OFFICE EQUIPMENT**

---

This unit is about how to use a range of office equipment (such as photocopiers, faxes, binders, laminators, printers or PCs) applying the necessary standards of health and safety and operating practice.

You will use the following specific skills:

- communicating
- organising
- planning
- problem solving
- using technology

This unit has **seven** outcomes:

### **Outcome 1**

Know about different types of office equipment and its uses

### **Outcome 2**

Understand the purpose of following instructions and health and safety procedures

### **Outcome 3**

Understand how to use equipment in a way that minimises waste

### **Outcome 4**

Know about the different types of problems that may occur when using equipment and how to deal with them

### **Outcome 5**

Understand the purpose of meeting work standards and deadlines

### **Outcome 6**

Understand the purpose of leaving equipment and the work area ready for the next user

### **Outcome 7**

Be able to use office equipment

## USE OFFICE EQUIPMENT

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**BE ABLE TO USE OFFICE EQUIPMENT** (OUTCOME 7)**What you must do**

You must show that you can perform **consistently** to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Locate and select equipment needed for a task	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Use equipment following manufacturer's and organisational guidelines	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Use equipment minimising waste	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Keep equipment clean and hygienic	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Deal with equipment problems following manufacturer's and organisational procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>6</b> Refer problems, if required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Make sure final work product meets agreed requirements	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Make sure that product is delivered to agreed timescale	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Make sure equipment, resources and work area are ready for the next user	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Know about different types of office equipment and its uses (OUTCOME 1)

Ref.

- K1 Identify different types of equipment and their uses
- K2 Describe the different features of different types of office equipment
- K3 Explain why different types of equipment are chosen for tasks
- K4 Explain the purpose of following manufacturer's instructions when using equipment

### Know about the different types of problems that may occur when using equipment and how to deal with them (OUTCOME 4)

Ref.

- K12 Give examples of equipment problems
- K13 Explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems
- K14 Give examples of how to deal with problems

### Understand the purpose of following instructions and health and safety procedures (OUTCOME 2)

Ref.

- K5 Explain the purpose of following organisational instructions when using equipment
- K6 Identify health and safety procedures for using different types of equipment
- K7 Explain the purpose of following health and safety procedures when using equipment
- K8 Explain the purpose of keeping equipment clean and hygienic

### Understand the purpose of meeting work standards and deadlines (OUTCOME 5)

Ref.

- K15 Explain the purpose of meeting work standards and deadlines when using equipment

### Understand the purpose of leaving equipment and the work area ready for the next user (OUTCOME 6)

Ref.

- K16 Explain the purpose of leaving equipment and the work area ready for the next user

### Understand how to use equipment in a way that minimises waste (OUTCOME 3)

Ref.

- K9 Give examples of waste when using equipment
- K10 Give examples of ways to reduce waste
- K11 Explain the purpose of minimising waste



**UNIT 257 (2FOH7)**

**COMMUNICATE IN A  
BUSINESS  
ENVIRONMENT**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to communicate in  
a business environment**

**August 2010 Version 1.0**



# **COMMUNICATE IN A BUSINESS ENVIRONMENT**

---

This unit is about communicating both verbally and in writing within a business environment.

You will use the following specific skills:

- communicating
- organising
- planning
- reflecting

This unit has **eight** outcomes:

**Outcome 1**

Understand the purpose of planning communication

**Outcome 2**

Understand how to communicate in writing

**Outcome 3**

Understand how to communicate verbally

**Outcome 4**

Understand the purpose of feedback in developing communication skills

**Outcome 5**

Be able to plan communication

**Outcome 6**

Be able to communicate in writing

**Outcome 7**

Be able to communicate verbally

**Outcome 8**

Be able to identify and agree ways of developing communication skills

# COMMUNICATE IN A BUSINESS ENVIRONMENT

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

## What you must do

You must show that you can perform **consistently** to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

## BE ABLE TO PLAN COMMUNICATION (OUTCOME 5)

Shaded numbers must be observed

	1	2	3	4
<b>1</b> Identify the purpose of communications and the audience(s)	C	C	C	C
<b>2</b> Select methods of communication to be used	C	C	C	C
<b>3</b> Confirm methods of communication, as required	C	C	C	C

## BE ABLE TO COMMUNICATE IN WRITING (OUTCOME 6)

Shaded numbers must be observed

	1	2	3	4
<b>4</b> Find and select information needed for written communications	C	C	C	C
<b>5</b> Organise, structure and present information so that it is clear, accurate and meets the needs of the audience	C	C	C	C
<b>6</b> Use language that suits the purpose of written communication and the audience	C	C	C	C
<b>7</b> Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear	C	C	C	C

<b>8</b> Proof read and check written communications and make amendments, as required	C	C	C	C
<b>9</b> Confirm what is important and what is urgent	C	C	C	C
<b>10</b> Produce written communications to meet agreed deadlines	C	C	C	C
<b>11</b> Keep a file copy of written communications sent	C	C	C	C

## BE ABLE TO COMMUNICATE VERBALLY (OUTCOME 7)

Shaded numbers must be observed

	1	2	3	4
<b>12</b> Verbally present information and ideas to others clearly and accurately	C	C	C	C
<b>13</b> Make contributions to discussion(s) that move the discussion forward	C	C	C	C
<b>14</b> Actively listen to information given by other people, and make relevant responses	C	C	C	C
<b>15</b> Ask relevant questions to clarify own understanding, as required	C	C	C	C
<b>16</b> Summarise verbal communication(s) and agree that the correct meaning has been understood	C	C	C	C

---

**BE ABLE TO IDENTIFY  
AND AGREE WAYS OF  
DEVELOPING  
COMMUNICATION  
SKILLS** (OUTCOME 8)

---

Shaded numbers must  
be observed

	1	2	3	4
<b>17</b> Get feedback to confirm whether the communication has achieved its purpose	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>18</b> Use feedback to identify and agree ways of improving own communication skills	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

---

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand the purpose of planning communication (OUTCOME 1)

Ref.

K1 Explain reasons for knowing the purpose of communication

K2 Explain reasons for knowing the audience to whom the communication is being presented

K3 Describe different methods of communication

K4 Describe when to use different methods of communication

### Understand how to communicate in writing (OUTCOME 2)

Ref.

K5 Identify different sources of information that may be used when preparing written communication

K6 Describe the communication principles for using electronic forms of written communication in a business environment

K7 Describe the reasons for using language that suits the purpose of written communication

K8 Describe ways of organising, structuring and presenting written information so it meets the needs of an audience

K9 Describe ways of checking for the accuracy of written information

K10 Explain the purpose of accurate use of grammar, punctuation and spelling

K11 Explain what is meant by plain English, and why it is used

K12 Explain the need to proof read and check written work

K13 Explain how to identify work that is important and work that is urgent

K14 Describe organisational procedures for saving and filing written communications

### Understand how to communicate verbally (OUTCOME 3)

Ref.

K15 Describe ways of verbally presenting information and ideas clearly

K16 Explain ways of making contributions to discussions that help to move them forward

K17 Describe methods of active listening

K18 Explain the purpose of summarising verbal communications

### Understand the purpose of feedback in developing communication skills (OUTCOME 4)

Ref.

K19 Describe ways of getting feedback on communications

K20 Explain the purpose of using feedback to develop communication skills



**UNIT 258 (2FOH9)**

## **PROVIDE RECEPTION SERVICES**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to provide reception services**

**August 2010 Version 1.0**



## **PROVIDE RECEPTION SERVICES**

---

This unit is about maintaining a reception service that enhances the vision and brand of the organisation.

You will use the following specific skills:

- communicating
- decision making
- interpersonal skill
- listening
- negotiating
- problem solving
- personal presentation
- organising
- questioning
- planning

This unit has **four** outcomes:

### **Outcome 1**

Understand the purpose of reception services in a business environment

### **Outcome 2**

Understand the procedures to be followed when providing reception services

### **Outcome 3**

Understand ways of improving reception services and developing own role

### **Outcome 4**

Provide a reception service

## PROVIDE RECEPTION SERVICES

### Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**PROVIDE A RECEPTION SERVICE** (OUTCOME 4)**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
--	----------	----------	----------	----------

<b>1</b>	Present a positive image of self and the organisation	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	---	----------	----------	----------	----------

<b>2</b>	Provide individuals with requested information and other useful information within guidelines on confidentiality	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	--	----------	----------	----------	----------

<b>3</b>	Follow entry and exit security procedures, if required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	--	----------	----------	----------	----------

<b>4</b>	Follow relevant health and safety procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	--	----------	----------	----------	----------

<b>5</b>	Deal with problems that may occur, if necessary	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	---	----------	----------	----------	----------

<b>6</b>	Refer problems, as required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	-----------------------------	----------	----------	----------	----------

<b>7</b>	Make sure a reception area gives a positive image of the organisation	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	---	----------	----------	----------	----------

<b>8</b>	Make suggestions for improving a reception area, as required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	--	----------	----------	----------	----------

<b>9</b>	Follow organisational procedures in the event of an accident or emergency as required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	---	----------	----------	----------	----------

<b>10</b>	Look for and complete additional task(s) during quiet periods, as required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
-----------	--	----------	----------	----------	----------

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand the purpose of reception service (OUTCOME 1)</b>		<b>Ref</b>
K1	Explain the purpose of the receptionist role as the first point of contact between the public/client and an organisation	
K2	Explain the purpose of presenting a positive image of self and the organisation	
K3	Explain how to present a positive image of self and the organisation	
<b>Understand the procedures to be followed when providing reception services (OUTCOME 2)</b>		<b>Ref.</b>
K4	Describe the structure and lines of communication in an organisation	
K5	Explain how the structure in an organisation affects lines of communication	
K6	Explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities	
K7	Explain how to carry out entry, departure, security and confidentiality procedures in a reception area	
K8	Explain the purpose of health and safety procedures when providing a reception service, including own responsibilities	

K9	Explain how to carry out health and safety procedures in a reception area	
K10	Describe the emergency procedures and your role within them	
K11	Describe the types of problems that may occur with visitors including, conflict and aggression	
K12	Explain ways of dealing with problems and when to refer them to an appropriate colleague	

### **Understand ways of improving reception services and developing own role (OUTCOME 3)**

Ref.

K13	Explain the purpose of suggesting ideas for improving a reception area
K14	Explain the purpose of carrying out additional duties if applicable and give examples



**UNIT 259 (2FOH10)**

## **STORE AND RETRIEVE INFORMATION**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to store and  
retrieve information**

**August 2010 Version 1.0**



## **STORE AND RETRIEVE INFORMATION**

---

This unit is about processing, storing, and retrieving information using different information systems, in line with organisational requirements.

You will use the following specific skills:

- communicating
- organising
- planning
- problem solving
- using technology

This unit has **three** outcomes:

### **Outcome 1**

Understand processes and procedures for storing and retrieving information

### **Outcome 2**

Be able to store information

### **Outcome 3**

Be able to retrieve information

# STORE AND RETRIEVE INFORMATION

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**BE ABLE TO STORE INFORMATION** (Outcome 2)

Shaded numbers must be observed		1	2	3	4
<b>1</b>	Identify, confirm and collect information to be stored	C	C	C	C
<b>2</b>	Follow legal and organisational procedures for security and confidentiality of information to be stored	C	C	C	C
<b>3</b>	Store information in approved locations	C	C	C	C
<b>4</b>	Check and update stored information, if required	C	C	C	C
<b>5</b>	Delete stored information, if required	C	C	C	C
<b>6</b>	Deal with, or refer problems, if required	C	C	C	C

**BE ABLE TO RETRIEVE INFORMATION** (OUTCOME 3)

Shaded numbers must be observed		1	2	3	4
<b>7</b>	Confirm and identify information to be retrieved	C	C	C	C
<b>8</b>	Follow legal and organisational procedures for security and confidentiality of information	C	C	C	C

<b>9</b>	Locate and retrieve the required information	C	C	C	C
<b>10</b>	Check and update information, if required	C	C	C	C
<b>11</b>	Provide information in the agreed format and timescale	C	C	C	C
<b>12</b>	Deal with, or refer problems if required	C	C	C	C

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand processes and procedures for storing and retrieving information (OUTCOME 1)</b>	<b>Ref.</b>
---	-------------

---

K1	Explain the purpose of storing and retrieving required information
----	--

---

K2	Describe different information systems and their main features
----	--

---

K3	Explain the purpose of legal and organisational requirements for the security and confidentiality of information
----	--

---

K4	Explain the purpose of confirming information to be stored and retrieved
----	--

---

K5	Describe ways of checking information for accuracy
----	--

---

K6	Explain the purpose of checking information for accuracy
----	--

---

K7	Explain the purpose of providing information to agreed format and timescales
----	--

---

K8	Describe the types of information that may be deleted
----	---

---

K9	Describe problems that may occur with information systems and how to deal with them, when necessary
----	---

---



**UNIT 260 (2FOH8)**

**HANDLE MAIL AND BOOK  
EXTERNAL SERVICES**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to handle mail and  
book external services**

**August 2010 Version 1.0**



# **HANDLE MAIL AND BOOK EXTERNAL SERVICES**

---

This unit is about collecting, sorting and distributing mail and booking external services such as transport.

This unit has **four** outcomes:

**Outcome 1**

Be able to handle mail and messages

**Outcome 2**

Know how to handle mail and messages

**Outcome 3**

Be able to book external services

**Outcome 4**

Know how to book external services

# HANDLE MAIL AND BOOK EXTERNAL SERVICES

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO HANDLE MAIL AND MESSAGES

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Collect <b>mail</b> and <b>messages</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Sort and distribute mail and messages to the correct person or place	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Deal with mail and messages which have not been collected and distributed in line with workplace procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Make sure that mail and messages are kept secure	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Mail

All must be covered. At least **1** of these must be observed by your assessor.

1	Letters	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Parcels	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Registered or courier-delivered post	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Electronic	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

### Messages

All must be covered. At least **2** of these must be observed by your assessor.

1	Faxes	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Emails	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Typed/handwritten memos	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO BOOK EXTERNAL SERVICES

(OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>5</b>	Identify customer needs and requirements	C	C	C	C
<b>6</b>	Identify organisations correctly and contact them as requested	C	C	C	C
<b>7</b>	Book <b>services</b> which meet customer needs	C	C	C	C
<b>8</b>	Provide customers with accurate details of the booking and of any alternatives	C	C	C	C
<b>9</b>	Follow organisation's procedures for booking services	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Services

All must be covered. At least **2** of these must be observed by your assessor.

1	Transport	C	C	C	C
2	Deliveries	C	C	C	C
3	Entertainment	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Know how to handle mail and messages (OUTCOME 2)</b>	<b>Ref.</b>	<b>Know how to book external services (OUTCOME 4)</b>	<b>Ref.</b>
K1 State why it is important to communicate politely and helpfully		K9 State the types of services that might be asked to be booked and the procedures that should be followed	
K2 State the legal requirements for handling mail and messages		K10 State why it is important to give accurate verbal and written information to customers	
K3 Describe safe and hygienic working practices when handling mail, messages and written communications		K11 State why confirmation and deposits are required from customers	
K4 Describe organisation's procedures for handling and distributing mail and why these are important		K12 Outline the types of unexpected situations and problems that may occur and how to deal with these	
K5 State why suspicious items should be reported immediately			
K6 Explain why written communications should be secured against unauthorised access			
K7 State what the procedures are for recoding delivery and registered mail			
K8 Outline the types of unexpected situations and problems that may occur and how to deal with these			



**UNIT 261 (2GEN5)**

## **RESOLVE CUSTOMER SERVICE PROBLEMS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to resolve  
customer service problems**

**August 2010 Version 1.0**



# **RESOLVE CUSTOMER SERVICE PROBLEMS**

---

This unit is about the effective handling of customer service problems. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

It is sometimes difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

This unit has **four** outcomes:

## **Outcome 1**

Spot customer service problems

## **Outcome 2**

Pick the best solution to resolve customer service problems

## **Outcome 3**

Take action to resolve customer service problems

## **Outcome 4**

Know how to resolve customer service problems

# RESOLVE CUSTOMER SERVICE PROBLEMS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**SPOT CUSTOMER SERVICE PROBLEMS**

(OUTCOME 1)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Listen carefully to customers about any <b>problem</b> they have raised	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Ask customers about the problem to check their understanding	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Recognise repeated problems and alert the appropriate authority	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Share customer feedback with others to identify potential problems before they happen	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Identify problems with systems and procedures before they begin to affect customers	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

**PICK THE BEST SOLUTION TO RESOLVE CUSTOMER SERVICE PROBLEMS**

(OUTCOME 2)

Shaded numbers must be observed	1	2	3	4
<b>6</b> Identify the options for resolving a customer service problem	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Work with others to identify and confirm the options to resolve a customer service problem	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

**What you must cover**

You must show that you have covered **ALL** of the following:

**Resolving problems**

All must be covered.

1	A problem first identified by customers	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	A problem identified within the organisation before it has affected your customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	A problem caused by differences between your customer's expectations and what your organisation can offer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	A problem caused by a system or procedure failure	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
5	A problem caused by a lack of resources or human error	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

- |           |  |                  |
|-----------|--|------------------|
| <b>8</b>  | Work out the advantages and disadvantages of each option for their customer and the organisation | <b>C C C C C</b> |
| <b>9</b>  | Pick the best option for their customer and the organisation                                     | <b>C C C C C</b> |
| <b>10</b> | Identify for their customer other ways that problems may be resolved if they are unable to help  | <b>C C C C C</b> |

## TAKE ACTION TO RESOLVE CUSTOMER SERVICE PROBLEM

(OUTCOME 3)

- | <b>Shaded numbers must be observed</b> | <b>1</b>   | <b>2</b> | <b>3</b> | <b>4</b> |          |
|--|--|----------|----------|----------|----------|
| <b>11</b>                              | Discuss and agree the options for solving the problem with their customer                                  | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>12</b>                              | Take action to implement the option agreed with their customer   | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>13</b>                              | Work with others and their customer to make sure that any promises related to solving the problem are kept | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>14</b>                              | Keep their customer fully informed about what is happening to resolve the problem                          | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>15</b>                              | Check with their customer to make sure the problem has been resolved to the customer's satisfaction        | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |
| <b>16</b>                              | Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction | <b>C</b> | <b>C</b> | <b>C</b> | <b>C</b> |

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Know how to resolve customer service problems (OUTCOME 4)</b>	<b>Ref.</b>
--	-------------

---

- |    |   |
|----|---|
| K1 | Describe organisational procedures and systems for dealing with customer service problems |
| K2 | Explain how to defuse potentially stressful situations                                    |
| K3 | Describe how to negotiate   |
| K4 | Identify the limitations of what they can offer their customer                            |
| K5 | Describe types of action that may make a customer problem worse and should be avoided     |
-



**UNIT 263 (2FOH11)**

**PROVIDE TOURISM  
INFORMATION SERVICES  
TO CUSTOMERS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to provide tourism  
information services to customers**

**August 2010 Version 1.0**



# **PROVIDE TOURISM INFORMATION SERVICES TO CUSTOMERS**

---

Customers visiting your premises will often have a range of enquiries regarding what is available to see and do while they are there. This unit is about providing tourism information to your guests. To do this you must be able to identify what it is your customers want and to source and provide that information.

This unit has **four** outcomes:

**Outcome 1**

Be able to work with customers on their tourism information needs

**Outcome 2**

Understand how to work with customers on their tourism information needs

**Outcome 3**

Be able to seek tourism information and offer advice to customers

**Outcome 4**

Understand how to seek tourism information and offer advice to customers

# PROVIDE TOURISM INFORMATION SERVICES TO CUSTOMERS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO WORK WITH CUSTOMERS ON THEIR TOURISM INFORMATION NEEDS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Politely welcome customers	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Use open questioning techniques to identify the customer needs	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Use active listening skills when identify the customer needs	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Make clear any areas of uncertainty with the customer if appropriate	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Confirm customer requirements	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>6</b> Ensure that the customer is willing to pay for any external tourism information services, if appropriate	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Focus on the customers needs while recognising other customers that may be waiting	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO SEEK TOURISM INFORMATION AND OFFER ADVICE TO CUSTOMERS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>8</b> Identify <b>sources</b> that provide the <b>information</b> required by the customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Ensure that the information identified is accurate, current and relates to the customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Provide relevant information and advice to the customer based on their needs	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>11</b> Clearly explain any restrictions with information and/or products and services when appropriate	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>12</b> Offer information and advice that best fits the customer needs if several options are available	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>13</b> Confirm politely with the customer that they have understood the information and advice that has been provided	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Information sources

All must be covered. At least **3** of these must be observed by your assessor.

1	Electronic sources	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Brochures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Directories	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Timetables	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
5	Maps	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
6	Guidebooks	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
7	External organisations	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
8	Leaflets	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

---

**14** Give customers written and/or printed confirmation of the information they have sought, where appropriate

**C C C C C**

---

**15** Ensure that the customer is happy with the service provided and politely conclude the customer enquiry

---

**C C C C C**

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand how to work with customers on their tourism information needs (OUTCOME 2)</b>	<b>Ref.</b>	<b>Understand how to seek tourism information and offer advice to customers (OUTCOME 4)</b>	<b>Ref.</b>
K1 State why it is important to be helpful and polite		K11 Describe how to access and use a range of different information sources	
K2 Explain when and how to use open question techniques effectively		K12 List a range of other external organisations that provide tourism information and how to contact them	
K3 State why using active listening skills is helpful to the customer		K13 Describe company's procedures with regards to booking fees, liabilities and billing customers	
K4 State why it is essential to confirm the customer needs		K14 Describe how to effectively structure advice and what limitations there are to the advice provided	
K5 State why it is important to check the customer is happy with the service and how to deal with any dissatisfaction		K15 State the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers	
K6 State how to access information and sources		K16 State the methods available for providing written or printed information to customers	
K7 Describe what tourism information the organisation possesses and where this is stored		K17 Describe methods for politely concluding customer interactions	
K8 Describe arrangements organisations can negotiate with tourism organisations			
K9 State what information is available without charge and what information is available with a charge			
K10 Describe how to organise the customers in manner that ensures all customers will be dealt with effectively			



**UNIT 264 (2HK1)**

**CLEANING AND  
SERVICING A RANGE OF  
HOUSEKEEPING AREAS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to clean and  
service a range of housekeeping areas**

**August 2010 Version 1.0**



# **CLEANING AND SERVICING A RANGE OF HOUSEKEEPING AREAS**

---

This unit is about daily cleaning routines. It covers cleaning toilet and bathroom areas, floors, walls and mirrors. It also covers cleaning furnished areas and disposing of both hazardous and non-hazardous waste.

This unit has **six** outcomes:

## **Outcome 1**

Be able to clean and service toilet and bathroom areas

## **Outcome 2**

Understand how to clean and service toilet and bathroom areas

## **Outcome 3**

Be able to clean and service furnished areas

## **Outcome 4**

Understand how to clean and service furnished areas

## **Outcome 5**

Be able to dispose of waste

## **Outcome 6**

Know how to dispose of waste

The typical day-to-day activities you might carry out for this unit include:

- preparing for cleaning operations
- selecting and using the correct equipment
- completing documentation such as room status reports
- dealing with customers when you meet them
- disposing of waste

# CLEANING AND SERVICING A RANGE OF HOUSEKEEPING AREAS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO CLEAN AND SERVICE TOILET AND BATHROOM AREAS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Prepare bathroom and toilet areas for cleaning	C	C	C	C
<b>2</b> Choose the correct cleaning equipment and materials for toilet and bathroom areas	C	C	C	C
<b>3</b> Clean toilets and surrounding areas correctly	C	C	C	C
<b>4</b> Clean bathroom appliances and surrounding areas correctly	C	C	C	C
<b>5</b> Clean floors, walls, mirrors and other areas following correct procedures	C	C	C	C
<b>6</b> Identify and report anything that needs maintenance or repair	C	C	C	C
<b>7</b> Complete and pass on any records of work, when required	C	C	C	C
<b>8</b> Carry out a final check of the area to ensure customer satisfaction	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Preparations

All must be covered. At least **1** of these must be observed by your assessor.

1	Use of protective clothing	C	C	C	C
2	Put up hazard warning signs	C	C	C	C
3	Protect surrounding areas	C	C	C	C

# BE ABLE TO CLEAN AND SERVICE FURNISHED AREAS (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>9</b> Prepare furnished areas for cleaning	C	C	C	C
<b>10</b> Choose the correct cleaning equipment and materials for each part of the area	C	C	C	C
<b>11</b> Clean the floor covering according to workplace procedures	C	C	C	C
<b>12</b> Clean the furniture according to workplace procedures	C	C	C	C
<b>13</b> Clean mirrors, wall covering and any other surfaces and leave the whole area tidy	C	C	C	C
<b>14</b> Identify and report anything that needs maintenance or repair	C	C	C	C
<b>15</b> Complete and pass on any records of work correctly	C	C	C	C
<b>16</b> Carry out a final check of the area to make sure it will satisfy the customer	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Preparations

All must be covered. At least **1** of these must be observed by your assessor.

1	Use of protective clothing	C	C	C	C
2	Put up hazard warning signs	C	C	C	C
3	Protect vulnerable surrounding areas	C	C	C	C

**BE ABLE TO DISPOSE OF WASTE** (OUTCOME 5)**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which must include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>17</b> Wear appropriate personal protective clothing	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>18</b> Prepare the <b>waste</b> for despatch making sure it is handled carefully	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>19</b> Sanitise waste containers following workplace procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

**What you must cover**

You must show that you have covered **ALL** of the following:

**Waste**

All must be covered. At least **1** of these must be observed by your assessor.

1	Hazardous waste	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Non-hazardous waste	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

**Collection methods**

All must be covered. At least **2** of these must be observed by your assessor.

1	External collection	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Incineration/ compression	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Recycling	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to clean and service toilet and bathroom areas (OUTCOME 2)

Ref.

K1 Describe what to do if customers are present when cleaning rooms

K2 Explain why it is important to prepare the area and yourself before cleaning and disposing of waste

K3 Give examples of the types of items in bathrooms and bedrooms that may need maintenance and repair

K4 Explain why it is important to report items needing repair and who to report them to

K5 Identify the types of records that should be kept in relation to cleaning

K6 Identify why work areas need to be inspected on completion

K7 State organisational standards for cleaning toilets and bathroom areas

K8 State when hazard signs are sometimes needed in preparing the work areas

K9 State what materials and equipment are used for cleaning different areas of the bathroom and how to choose the correct one

K10 Describe the types of unexpected situations that may happen when cleaning bathrooms and toilets and how to deal with them

### Understand how to clean and service furnished areas (OUTCOME 4)

Ref.

K11 State organisational standards for cleaning in furnished areas

K12 Describe safe lifting and carrying techniques and why these should always be used

K13 State what materials and equipment are used for cleaning different furnished areas and how to choose the correct one

K14 Explain why certain areas need to be kept secure from unauthorised access

K15 Describe the types of unexpected situations that may happen when cleaning furnished areas and how to deal with these

### Know how to dispose of waste (OUTCOME 6)

Ref.

K16 Describe how to identify different sorts of waste and how different sorts of waste should be disposed of

K17 State what materials and equipment are used for waste disposal

K18 Describe the types of problems and unexpected situations that may happen when disposing of waste and how to deal with these



**UNIT 265 (2HK2)**

**USE OF DIFFERENT  
CHEMICALS AND  
EQUIPMENT IN  
HOUSEKEEPING**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to use different  
chemicals and equipment in housekeeping  
August 2010 Version 1.0**



# **USE OF DIFFERENT CHEMICALS AND EQUIPMENT IN HOUSEKEEPING**

---

This unit is about choosing the right cleaning chemicals, using the chemicals correctly and disposing of them safely. This unit also covers using manual equipment (such as wet mops, dry mops, dusters and buckets) and electrical equipment (such as suction cleaners and spray extractors).

This unit has **six** outcomes:

## **Outcome 1**

Be able to work using different chemicals

## **Outcome 2**

Understand how to work using different chemicals

## **Outcome 3**

Be able to work using manual equipment

## **Outcome 4**

Understand how to work using manual equipment

## **Outcome 5**

Be able to work using electrical equipment

## **Outcome 6**

Know how to work using electrical equipment

The typical day-to-day activities you might carry out for this unit include:

- selecting the correct chemicals for the job
- preparing and using chemicals
- storing chemicals
- selecting the correct equipment for the job
- using manual and electrical equipment correctly and safely
- storing equipment

# USE OF DIFFERENT CHEMICALS AND EQUIPMENT IN HOUSEKEEPING

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO WORK USING DIFFERENT CHEMICALS (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Choose correct <b>chemicals</b> for areas going to be cleaned	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Wear appropriate protective clothing	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Prepare and use chemicals in line with the manufacturers' instructions, using the correct equipment	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Store chemicals securely	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Complete relevant documentation in line with organisational procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Chemicals

All must be covered. At least **3** of these must be observed by your assessor.

1	Multi-surface cleaner	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Toilet cleaner	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Glass cleaner	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Air freshener	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
5	Polish	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
6	Sanitizer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
7	Other	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO WORK USING MANUAL EQUIPMENT (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>6</b> Choose correct <b>equipment</b> for areas going to be cleaned	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Prepare areas for cleaning	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Use equipment safely, correctly and where appropriate using correct chemicals	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Leave areas clean and tidy and free from debris	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Store equipment in line with organisational procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Equipment

All must be covered. At least **5** of these must be observed by your assessor.

1	Mop systems for wet use	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Mop systems for dry use	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Colour-coded cloths	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Duster	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
5	Bucket	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
6	Sponge/non-abrasive pad	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
7	Brushes	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
8	Dustpan	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
9	Abrasive pad	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO WORK USING ELECTRICAL EQUIPMENT (OUTCOME 5)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which must include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>11</b> Choose the correct <b>equipment</b> and chemicals for the area to be cleaned	C	C	C	C
<b>12</b> Check that equipment is safe to use	C	C	C	C
<b>13</b> Select and use correct <b>attachments</b> for equipment	C	C	C	C
<b>14</b> Use equipment, attachments and <b>chemicals</b> in line with manufacturers' instructions	C	C	C	C
<b>15</b> Store equipment and attachments correctly in line with the manufactures' instructions	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Equipment

All must be covered. At least **1** of these must be observed by your assessor..

1	Vacuum cleaners	C	C	C	C
2	Suction dryers	C	C	C	C
3	Polishers/ burnishers	C	C	C	C
4	Scrubbers	C	C	C	C
5	Spray extractors	C	C	C	C

### Attachments

All must be covered. At least **2** of these must be observed by your assessor.

1	Hard/soft floor attachments	C	C	C	C
2	Upholstery attachments	C	C	C	C
3	Brushes/pads	C	C	C	C
4	Crevice tools	C	C	C	C
5	Spray extractors/nozzles	C	C	C	C
6	Hoses	C	C	C	C

### Chemicals

All must be covered. At least **2** of these must be observed by your assessor.

1	Carpet shampoo	C	C	C	C
2	Foam inhibitor	C	C	C	C
3	Spray polish	C	C	C	C
4	Floor maintainer	C	C	C	C
5	Floor stripper	C	C	C	C
6	Degreasers	C	C	C	C
7	Greasy stain removers	C	C	C	C
8	Non-greasy stain removers	C	C	C	C
9	Cleaning granules	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### **Understand how to work using different chemicals (OUTCOME 2)**

**K1** State the basic legal requirements relating to safe working practices when using cleaning chemicals

**K2** Describe the warning signs used on cleaning chemicals containers and what they mean

**K3** State how to select appropriate chemicals for a full range of cleaning jobs

**K4** Explain why it is important to wear protective clothing when using chemicals

**K5** Explain why it is important to follow manufacturers' instructions for cleaning chemicals

**K6** Explain why it is dangerous to mix certain types of chemicals together

**K7** State what might happen if relevant legal requirements for this sort of work are not followed

**K8** Explain why work routines and sequences need to be followed

**K9** Described what precautions should be made to the work area before using chemicals

**K10** State documents that should to be completed when using chemicals

**K11** Outline the types of problems and unexpected situations that may happen when preparing and using chemicals and how to deal with these

### **Understand how to work using manual equipment (OUTCOME 4)**

**Ref.**

**K12** State the basic legal requirements relating to safe working practices when using manual cleaning equipment

**K13** Explain how to choose manual cleaning equipment for the types of cleaning to be carried out

**K14** State why it is important to follow manufacturers' instructions for manual equipment

**K15** State why the equipment should be cleaned and stored correctly after use

**K16** Outline the types of problems and unexpected situations that may happen when preparing and using manual cleaning equipment and how to deal with these

### **Know how to work using electrical equipment (OUTCOME 6)**

**Ref.**

**K17** State current relevant legislation relating to safe working practices when using cleaning chemicals and electrical equipment

**K18** State the main dangers when using electrical equipment and how to avoid these

**K19** Describe safe handling and lifting techniques

**K20** Explain why safe carrying and lifting techniques should be used

**K21** State what factors need to be taken into account when using electrical equipment

**K22** Describe the types of problems and unexpected situations that may happen when preparing and using electrical cleaning equipment and how to deal with these



**UNIT 266 (2HK3)**

**MAINTAIN  
HOUSEKEEPING  
SUPPLIES**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to maintain  
housekeeping supplies**

**August 2010 Version 1.0**



## **MAINTAIN HOUSEKEEPING SUPPLIES**

---

This unit is about receiving housekeeping supplies and checking for any discrepancies in deliveries. It also covers storing housekeeping supplies correctly and issuing the right supplies to other staff.

This unit has **four** outcomes:

### **Outcome 1**

Be able to receive and check housekeeping supplies

### **Outcome 2**

Understand how to receive and check housekeeping supplies

### **Outcome 3**

Be able to store and issue housekeeping supplies

### **Outcome 4**

Understand how to store and issue housekeeping supplies

The typical day-to-day activities you might carry out for this unit include:

- receiving and checking deliveries
- dealing with discrepancies
- completing documents
- handling and transporting supplies
- storing supplies
- issuing supplies
- rotating stock
- maintaining storage areas and keeping them locked

# MAINTAIN HOUSEKEEPING SUPPLIES

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO RECEIVE AND CHECK HOUSEKEEPING SUPPLIES (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Receive <b>deliveries of housekeeping supplies</b> and check that they are not damaged and are within their use-by-date	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Match deliveries to order and delivery notes	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Complete delivery documents accurately	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Handle and move housekeeping supplies to storage areas safely and without damaging or losing any supplies	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Keep receiving areas clean, tidy, hygienic and secure	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Deliveries

All must be covered. At least **1** of these must be observed by your assessor.

1	External suppliers	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Internal suppliers	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

### Housekeeping supplies

All must be covered. At least **2** of these must be observed by your assessor.

1	Equipment	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Materials	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Customer supplies	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO STORE AND ISSUE HOUSEKEEPING SUPPLIES (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>6</b> Store <b>housekeeping supplies</b> under the correct <b>storage conditions</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Issue <b>housekeeping supplies</b> ensuring they are handled in line with manufacturers' instructions	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Follow stock rotation and issuing procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Report low levels of housekeeping supplies to the appropriate members of staff	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Keep storage areas clean, tidy and hygienic, reporting signs of pest infestations immediately	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>11</b> Secure storage areas against unauthorised access	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>12</b> Refer all tasks outside own area of responsibility to the appropriate member of staff	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Housekeeping supplies

All must be covered. At least **2** of these must be observed by your assessor.

1	Equipment	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Materials	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Customer supplies	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

### Storage conditions

All must be covered. At least **3** of these must be observed by your assessor.

1	Lighting	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Ventilation	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Temperature	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Cleanliness	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to receive and check housekeeping supplies (OUTCOME 2)

- |  | Ref. |
|--|------|
| K1 State the basic legal requirements relating to safe working practices when handling housekeeping supplies |      |
| K2 State why damaged goods should not be accepted and what to do if they are delivered                       |      |
| K3 Describe safe lifting and handling techniques and why they are important                                  |      |
| K4 State why it is important to keep receiving areas clean and tidy  |      |
| K5 State why receiving areas need to be secure from unauthorised access                                      |      |
| K6 State procedures to follow when discrepancies in deliveries/delivery documentations have been identified  |      |
| K7 State procedures to follow to handle and transport goods safely to storage areas                          |      |

### Understand how to store and issue housekeeping supplies (OUTCOME 4)

- |  |  |
|--|--|
| K8 State why storage conditions are important and what effect they have on housekeeping supplies |  |
| K9 State what procedures to follow   |  |

to correctly and safely store goods

- |   |  |
|---|--|
| K10 State why it is important to store housekeeping supplies under the correct conditions – including clean and tidy      |  |
| K11 State why storage areas need to be secure from unauthorised access  |  |
| K12 Describe what procedures to follow to proof storage areas for pest infestation  |  |
| K13 State why a constant stock of housekeeping supplies should be maintained  |  |
| K14 State what the minimum and maximum stock levels are   |  |
| K15 State why it is important to maintain accurate and complete records of items received, stored and issued              |  |
| K16 State why it is important to separate different kinds of stock, for example food and chemicals                        |  |
| K17 Outline the types of problems and unexpected situations that may happen when storing goods and how to deal with these |  |



**UNIT 267 (2HK4)**

**CLEAN, MAINTAIN AND  
PROTECT SEMI-HARD  
AND HARD FLOORS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to clean, maintain  
and protect semi-hard and hard floors**

**August 2010 Version 1.0**



# **CLEAN, MAINTAIN AND PROTECT SEMI-HARD AND HARD FLOORS**

---

This unit is about cleaning, maintaining and protecting semi-hard floors using manual equipment such as brushes, mops and vacuum cleaners. It covers assessing the amount of cleaning that is required, the most suitable cleaning agents and the necessary cleaning equipment.

It is also about employing the correct process when cleaning by removing ground-in dirt before applying the appropriate treatment and ensuring, when your work is complete, that the area is left dry.

It also covers the application of protective coatings, burnishing the floor using appropriate electrical equipment and then reinstating the work area when you have finished.

This unit has **six** outcomes:

## **Outcome 1**

Understand how to prepare to clean semi-hard and hard floors

## **Outcome 2**

Understand how to clean semi-hard and hard floors

## **Outcome 3**

Understand how to treat semi-hard and hard floors

## **Outcome 4**

Understand how to protect hard floors

## **Outcome 5**

Be able to prepare to clean semi-hard and hard floors

## **Outcome 6**

Be able to clean semi-hard and hard floors

## **Outcome 7**

Be able to protect hard floors

The typical day-to-day activities you might carry out for this unit include:

- preparing working areas and equipment
- choosing cleaning chemicals and accessories
- using cleaning equipment and chemicals
- choosing and applying protective coatings
- burnishing floors

# CLEAN, MAINTAIN AND PROTECT SEMI-HARD AND HARD FLOORS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**BE ABLE TO PREPARE TO CLEAN SEMI-HARD AND HARD FLOORS**

(OUTCOME 5)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Prepare the work area and equipment so that the task can be completed efficiently, correctly	C	C	C	C
<b>2</b> Select the appropriate personal protective equipment for use when cleaning floors	C	C	C	C
<b>3</b> Select the correct equipment for the work area and the most effective treatment to use	C	C	C	C
<b>4</b> Report damaged and deteriorated floor surfaces that may require restoration	C	C	C	C
<b>5</b> Identify and note any factors that may affect how the floor is cleaned	C	C	C	C
<b>6</b> Identify any additional requirements that need to be applied other than supervisors instructions	C	C	C	C
<b>7</b> Ventilate the area during cleaning	C	C	C	C

**BE ABLE TO CLEAN SEMI-HARD AND HARD FLOORS** (OUTCOME 6)

Shaded numbers must be observed	1	2	3	4
<b>8</b> Remove large items of debris and loose dust carefully and safely without causing it to spread	C	C	C	C
<b>9</b> Report any bodily fluid or spillages that cannot be identified according to organisational requirements	C	C	C	C
<b>10</b> Select a method for clearing up spillages that is correct for: <ul style="list-style-type: none"> <li>• the floor</li> <li>• the size of spillage</li> <li>• the type of spillage</li> </ul>	C	C	C	C
<b>11</b> Select equipment and cleaning agents that are right for the floor taking into account the amount of ground-in soil	C	C	C	C
<b>12</b> Soften ground-in soil and stains before attempting to remove them	C	C	C	C
<b>13</b> Conduct a test clean in an area where marks are least likely to be noticed	C	C	C	C
<b>14</b> Apply the treatment safely according to manufacturer's instructions without over wetting or damaging the surface	C	C	C	C
<b>15</b> Report stains that cannot be removed	C	C	C	C
<b>16</b> Dispose of unused cleaning treatments and waste products in line with organisational requirements	C	C	C	C

## BE ABLE TO PROTECT HARD FLOORS

(OUTCOME 7)

---

<b>17</b>	Select an appropriate protective coating and equipment for the floor surface	<b>C C C C</b>
<b>18</b>	Apply the correct number of protective coatings evenly and systematically to the floor, following manufacturer's instructions	<b>C C C C</b>
<b>19</b>	Leave the floor dry and free of dust	<b>C C C C</b>
<b>20</b>	Dispose of unused materials correctly and return items to the correct place	<b>C C C C</b>
<b>21</b>	Dispose of waste correctly	<b>C C C C</b>
<b>22</b>	Reinstate the work area	<b>C C C C</b>

---

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to prepare to clean semi-hard and hard floors (OUTCOME 1)

- |  | Ref.   |
|--|--|
| K1 State types of semi-hard and hard floors  | K12 Describe the safe handling techniques which should be used for removing large items of debris                                      |
| K2 Explain the process for preparing to clean hard floors  | K13 State methods for removing loose dust and debris   |
| K3 State the importance of maintaining personal hygiene when cleaning  | K14 Explain how to select a method for removing loose dust and debris  |
| K4 State the importance of removing personal items and where these should be stored                              | K15 State which containers to put dust and debris into   |
| K5 State the importance of wearing appropriate personal protective equipment and for others to see it being worn | K16 Describe how different types of spillages can be identified  |
| K6 State the importance of checking health and safety instructions against organisational requirements           | K17 Describe the importance of reporting body fluids and spillages that you cannot identify  |
| K7 Explain why it is important to follow the checks and restrictions for use of deep cleaning equipment          | K18 Give reasons why body fluids or spillages that are unidentified should not be cleaned until instructions to do so have been issued |
| K8 State what could happen if the right safety measures are not taken  | K19 State methods that could be used to remove spillages   |
| K9 State the importance of colour coding   | K20 Explain how to select a method to clean up spillages   |
| K10 State factors which would affect how to clean a semi-hard or hard floor                                      | K21 State the importance of disposing of unused cleaning solutions correctly   |

### Understand how to clean semi-hard and hard floors (OUTCOME 2)

- |  | Ref. |
|--|------|
| K11 State the importance of removing large items of debris by hand before beginning cleaning |      |

### Understand how to treat semi-hard and hard floors (OUTCOME 3)

---

K25 Describe the circumstances under which equipment and surfaces should be pre-treated

---

K26 Explain why treatments should be applied evenly

---

K27 State the importance of reporting any stains that cannot be removed

---

K28 State the importance of leaving the floor:

- neutralised
  - free of ground in soil
  - free of protective coatings
- 

**Understand how to protect hard floors (OUTCOME 4)      Ref.**

---

K29 State the range of protective coatings available

---

K30 Describe how to select an appropriate protective coating

---

K31 Explain how to decide on the number of protective coatings which should be applied

---

K32 State the importance of applying the coating and burnishing evenly

---

K33 Describe the correct method of disposing of unused protective coatings

---

K34 State the importance of putting things back as you found them when cleaning is complete

---



**UNIT 268 (2HK5)**

**CLEAN AND MAINTAIN  
SOFT FLOORS AND  
FURNISHINGS**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to clean and  
maintain soft floors and furnishings**

**August 2010 Version 1.0**



# **CLEAN AND MAINTAIN SOFT FLOORS AND FURNISHINGS**

---

This unit is about cleaning soft floors or furnishings, including the removal of stains and applying independent treatments to carpets and soft furnishings.

This unit covers a range of specialist methods including: dry suction, pile agitation, bonnet mopping absorption, dry powder extraction, water extraction, dry solvent application, shampooing, and pile realignment.

This unit is the same as the Unit C2 14 by Asset Skills, the Sector Skills Council (SSC) for facilities management, housing, property, planning, cleaning and parking.

This unit has **four** outcomes:

## **Outcome 1**

Understand how to prepare soft floors or furnishings

## **Outcome 2**

Understand how to maintain soft floors or furnishings

## **Outcome 3**

Be able to prepare soft floors or furnishings for maintenance

## **Outcome 4**

Be able to maintain soft floors or furnishings

The typical day-to-day activities you might carry out for this unit include:

- preparing working areas and equipment
- checking the type of material and choosing chemicals and cleaning methods that are suitable
- cleaning carpets and soft furnishings
- removing spots and stains.

# CLEAN AND MAINTAIN SOFT FLOORS AND FURNISHINGS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

## BE ABLE TO PREPARE TO MAINTAIN SOFT FLOORS AND FURNISHINGS (OUTCOME 3)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Prepare the work area and equipment so that the task can be completed efficiently and safely	C	C	C	C
<b>2</b> Examine the material to make sure it is suitable for the planned treatment given the: <ul style="list-style-type: none"> <li>• type of soiling</li> <li>• position</li> <li>• amount of soiling</li> </ul>	C	C	C	C
<b>3</b> Identify whether the material is colourfast and shrink resistant	C	C	C	C
<b>4</b> Identify and report damaged and deteriorated surfaces that may require restoration	C	C	C	C
<b>5</b> Identify and note any factors that may affect how the material is cleaned	C	C	C	C
<b>6</b> Identify any additional requirements that need to be applied other than supervisor's instructions	C	C	C	C

<b>7</b> Identify and move any portable objects that may hinder working	C	C	C	C
<b>8</b> Ventilate the area during deep cleaning	C	C	C	C

## BE ABLE TO MAINTAIN SOFT FLOORS AND FURNISHINGS (OUTCOME 4)

Shaded numbers must be observed	1	2	3	4
<b>9</b> Remove loose dust and debris before applying the cleaning agent or treatment	C	C	C	C
<b>10</b> Soften ground-in soil and stains before attempting to remove them	C	C	C	C
<b>11</b> Conduct a test clean in an area where marks are least likely to be noticed	C	C	C	C
<b>12</b> Apply the treatment safely according to manufacturer's instructions without over wetting or damaging the material	C	C	C	C
<b>13</b> Assess the treated area and apply more treatment to remove stains safely where necessary	C	C	C	C
<b>14</b> Leave surfaces with an even appearance when work is completed	C	C	C	C
<b>15</b> Leave the material free of excess moisture and ground in soil when work is completed	C	C	C	C
<b>16</b> Dispose of waste correctly	C	C	C	C
<b>17</b> Reinststate the work area	C	C	C	C
<b>18</b> Report stains that cannot be removed	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to prepare to clean soft floors and furnishings (OUTCOME 1)

Ref.

K1 Describe the importance of having an up-to-date cleaning specification and from where it can be obtained

K2 State the importance of maintaining personal hygiene when cleaning

K3 State the importance of removing personal items and where these should be stored

K4 State the importance of wearing the appropriate personal protective equipment and for others to see it being worn

K5 State the importance of checking health and safety instructions against organisational requirements

K6 Explain why it is important to follow the checks and restrictions for use of deep cleaning equipment

K7 Describe how to assess that the material is suitable for the planned treatment

### Understand how to maintain soft floors and furnishings (OUTCOME 2)

Ref.

K8 State the importance of removing superficial dust and debris before commencing the cleaning process and how this is done

K9 Describe the best methods and materials for carrying out deep cleaning identifying possible alternatives

K10 Describe methods of softening ground-in soiling and stains and how to identify when the material is soft enough

K11 Explain how to select the most appropriate place to carry out test cleans

K12 Explain why test cleans should be carried out before applying treatments

K13 Describe the circumstances in which equipment and surfaces should be pre-treated

K14 Explain why treatments should be applied evenly

K15 Describe how to clean methodically to reduce dust spreading

K16 State ways to avoid damaging surfaces and the possible results of any damage

K17 State the importance of taking precautions in cleaning unsecured items such as rugs

K18 State the possible dangers of working at heights and how to do so safely

K19 Describe the importance of removing any excess moisture from the area which has been cleaned



**UNIT 269 (2HK6)**

**PROVIDE A LINEN SERVICE**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to provide a linen service**

**August 2010 Version 1.0**



## **PROVIDE A LINEN SERVICE**

---

This unit is about taking delivery of linen supplies, checking deliveries and completing any relevant forms. The unit also covers storing linen under the correct conditions and using stock rotation procedures.

This unit has **four** outcomes:

### **Outcome 1**

Be able to receive and check linen

### **Outcome 2**

Understand how to receive and check linen

### **Outcome 3**

Be able to store and issue clean linen

### **Outcome 4**

Understand how to store and issue clean linen

The typical day-to-day activities you might carry out for this unit include:

- receiving and checking linen
- dealing with discrepancies
- completing documents
- handling and transporting linen
- storing linen
- issuing linen
- rotating stock
- maintaining storage areas

# PROVIDE A LINEN SERVICE

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO RECEIVE AND CHECK LINEN

(OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Match <b>deliveries</b> of linen supplies orders and delivery notes	C	C	C	C
<b>2</b> Complete delivery documentation accurately	C	C	C	C
<b>3</b> Report discrepancies with deliveries to the appropriate person	C	C	C	C
<b>4</b> Move clean linen safely to the storage area	C	C	C	C
<b>5</b> Check linen meets <b>presentation requirements</b> and report any discrepancies to the appropriate person	C	C	C	C
<b>6</b> Keep receiving areas clean, tidy, hygienic and secure	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Deliveries

All must be covered. At least **1** of these must be observed by your assessor.

1	Internal linen supply	C	C	C	C
2	External linen supply	C	C	C	C

### Presentation requirements

All must be covered. At least **3** of these must be observed by your assessor.

1	Clean	C	C	C	C
2	Free from stains	C	C	C	C
3	Free from fabric damage	C	C	C	C
4	Folded correctly	C	C	C	C

# BE ABLE TO STORE AND ISSUE CLEAN LINEN

(OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>7</b> Store linen supplies under the correct <b>conditions</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Follow stock rotation procedures	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Issue correct type and quantity of linen to staff	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Keep accurate and complete records of items received, stored and issued	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>11</b> Report signs of missing stock immediately	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>12</b> Keep storage areas clean, dry and secure	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>13</b> Report any signs of pest infestation immediately	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Conditions

All must be covered. At least **3** of these must be observed by your assessor.

1	Lighting	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Ventilation	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Temperature	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
4	Cleanliness	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### Understand how to receive and check linen (OUTCOME 2)

#### Ref.

- |    |  |
|----|--|
| K1 | State current legislation relating to safe working practices when handling and storing linen                   |
| K2 | State why damaged goods should not be accepted   |
| K3 | State procedures to follow if the amount delivered does not match orders and delivery notes                    |
| K4 | Describe what procedures to follow if the linen delivered does not meet the required standards of presentation |
| K5 | Describe what to do if bed bugs or other infestations are spotted in clean linen                               |
| K6 | State why receiving areas should be kept clean, tidy and free from rubbish                                     |
| K7 | State why linen received should be checked if it is correctly folded   |

K12	Describe why accurate records of clean linen items received, stored and issued should be maintained
-----	---

K13	State why it is important to secure linen stores against unauthorised access
-----	--

K14	State what procedures should be followed to make sure pest infestation does not occur
-----	---

K15	Describe what to do if pest infestation is identified
-----	---

K16	Describe the types of problems that may happen when storing linen and how to deal with these
-----	--

### Understand how to store and issue clean linen (OUTCOME 4)

#### Ref.

- |     |   |
|-----|---|
| K8  | Explain why storage conditions are important and what effects they have on linen items in storage |
| K9  | Describe what procedures should be followed to store linen  |
| K10 | Explain why stock rotation procedures are important   |
| K11 | State procedures to follow to issue linen items to staff  |



**UNIT 270 (2HK7)**

**CARRY OUT PERIODIC  
ROOM SERVICING AND  
DEEP CLEANING**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to carry out  
periodic room servicing and deep cleaning**

**August 2010 Version 1.0**



# **CARRY OUT PERIODIC ROOM SERVICING AND DEEP CLEANING**

---

This unit is about carrying out periodic deep cleaning of hotel rooms. It covers activities such as turning mattresses, changing curtains, high dusting, cleaning carpet edges, skirting boards and paintwork.

This unit has **four** outcomes:

## **Outcome 1**

Be able to carry out periodic room servicing

## **Outcome 2**

Understand how to carry out periodic room servicing

## **Outcome 3**

Be able to carry out periodic deep cleaning

## **Outcome 4**

Understand how to carry out periodic deep cleaning

The typical day-to-day activities you might carry out for this unit include:

- following your schedule for periodic room servicing and deep cleaning
- obtaining the necessary stock for replacing items in the rooms
- following the correct procedures for items you have replaced
- preparing areas for deep cleaning
- carrying out deep cleaning
- rearranging the room in the correct way
- identifying and reporting items and areas that may need specialist maintenance

# CARRY OUT PERIODIC ROOM SERVICING AND DEEP CLEANING

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

# BE ABLE TO CARRY OUT PERIODIC ROOM SERVICING (OUTCOME 1)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>1</b> Make sure necessary information about the schedule and requirements for <b>periodic room servicing</b> is available	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Obtain necessary stock to replace items in the room	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Carry out required periodic room servicing	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Leave the room in the required condition	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Follow the correct procedures for items that have been replaced	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>6</b> Identify and report anything that needs specialist maintenance	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Periodic room servicing

All must be covered. At least **1** of these must be observed by your assessor.

1	Turning mattresses	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Changing curtains and drapes	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	Changing other soft furnishings as required	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

# BE ABLE TO CARRY OUT PERIODIC DEEP CLEANING (OUTCOME 3)

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

<b>Shaded numbers must be observed</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>7</b> Make sure necessary information about the schedule and requirements for <b>periodic deep cleaning</b> are available	C	C	C	C
<b>8</b> <b>Prepare</b> areas for periodic deep cleaning	C	C	C	C
<b>9</b> Choose the correct cleaning equipment and materials for each part of the area	C	C	C	C
<b>10</b> Carry out periodic deep cleaning	C	C	C	C
<b>11</b> Leave rooms in required condition	C	C	C	C
<b>12</b> Identify and report any items that need specialist maintenance	C	C	C	C

## What you must cover

You must show that you have covered **ALL** of the following:

### Preparations

All must be covered. At least **2** of these must be observed by your assessor.

1	Use of appropriate protective clothing	C	C	C	C
2	Move furniture to clean underneath	C	C	C	C
3	Protect vulnerable surrounding areas	C	C	C	C

### Periodic deep cleaning

All must be covered. At least **5** of these must be observed by your assessor.

1	High dusting	C	C	C	C
2	Vacuum under furniture and carpet edges	C	C	C	C
3	Clean shower rails, plugs traps, drains, gulleys and behind pedestals	C	C	C	C
4	Clean pull cords, plugs and switches	C	C	C	C
5	Clean skirting boards and other paintwork	C	C	C	C
6	Clean air vents and extractors	C	C	C	C

## What you must know

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand how to carry out periodic room servicing (OUTCOME 2)</b>	<b>Ref.</b>	<b>Understand how to carry out periodic deep cleaning (OUTCOME 4)</b>	<b>Ref.</b>
K1 Outline the schedule for periodic room servicing and deep clean in organisation		K8 Outline the preparations needed to carry out periodic deep cleaning and why these are important	
K2 State why it is important to follow this schedule		K9 State the equipment and materials needed for periodic deep cleaning and how to obtain them	
K3 State why the work area needs to be inspected on completion		K10 Describe how to use the equipment and materials efficiently and safely	
K4 State organisation's quality standards for the appearance and cleanliness of rooms		K11 State health and safety requirements for high dusting	
K5 State areas and items that may need specialist maintenance and how to report these			
K6 State how to identify items that need replacing and obtain the correct items			
K7 State the correct procedures for dealing with items that have been replaced			



**UNIT 273 (2GEN6)**

**PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to promote additional services or products to customers**

**August 2010 Version 1.0**



# **PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS**

---

Services or products are continually changing in organisations to keep up with customers' expectations. By offering new or improved services or products your organisation can increase customer satisfaction. Many organisations must promote these to be able to survive in a competitive world. This unit is about your need to keep pace with new developments and to encourage your customers to take an interest in them. Customers expect more and more services or products to be offered to meet their own growing expectations; from offering dinner reservations at check-in to providing a coffee and liqueurs service at the end of a meal. They need to be made aware of what is available from your organisation.

This unit has **four** outcomes:

## **Outcome 1**

Identify additional services or products that are available

## **Outcome 2**

Inform customers about additional services or products

## **Outcome 3**

Gain customer commitment to using additional services or products

## **Outcome 4**

Understand how to promote additional services or products to customers

# PROMOTE ADDITIONAL SERVICES OR PRODUCTS TO CUSTOMERS

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**IDENTIFY ADDITIONAL SERVICES OR PRODUCTS THAT ARE AVAILABLE** (OUTCOME 1)

**Shaded numbers must be observed**      1   2   3   4

<b>1</b>	Update and develop their knowledge of their organisation's services or products	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b>	Check with others when they are unsure about new service or product details	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b>	Identify appropriate services or products that may interest their customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b>	Spot opportunities for offering their customer <b>additional services or products</b> that will improve the customer experience	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

**INFORM CUSTOMERS ABOUT ADDITIONAL SERVICES OR PRODUCTS** (OUTCOME 2)

**Shaded numbers must be observed**      1   2   3   4

<b>5</b>	Choose the best time to inform their customer about additional services or products	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
----------	---	----------	----------	----------	----------

**What you must cover**

You must show that you have covered **ALL** of the following:

**Additional services or products offered**

All must be covered.

1	Use of services or products that are new to your customer	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	Additional use of services or products that your customer has used before	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

<b>6</b>	Choose the best method of communication to introduce their customer to additional services or products	<b>C C C C C</b>
<b>7</b>	Give their customer accurate and sufficient information to enable them to make a decision about the additional services or products	<b>C C C C C</b>
<b>8</b>	Give their customer time to ask questions about the additional services or products	<b>C C C C C</b>

<b>13</b>	Refer their customer to others or to alternative sources of information if the additional services or products are not their responsibility	<b>C C C C C</b>
-----------	---	------------------

**GAIN CUSTOMER COMMITMENT TO USING ADDITIONAL SERVICES OR PRODUCTS** (OUTCOME 3)

**Shaded numbers must be observed**      **1 2 3 4**

<b>9</b>	Close the conversation if the customer shows no interest	<b>C C C C C</b>
<b>10</b>	Give information to move the situation forward when their customer shows interest	<b>C C C C C</b>
<b>11</b>	Secure customer agreement and check customer understanding of the delivery of the service or product	<b>C C C C C</b>
<b>12</b>	Take action to ensure prompt delivery of the additional services or products to their customer	<b>C C C C C</b>

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

<b>Understand how to promote additional services or products to customers (OUTCOME 4)</b>	<b>Ref.</b>
---	-------------

---

K1	Describe the organisation's procedures and systems for encouraging the use of additional services or products
----	---

---

K2	Explain how additional services or products will benefit their customers
----	--

---

K3	Explain how their customer's use of additional services or products will benefit their organisation
----	---

---

K4	Identify the main factors that influence customers to use their services or products
----	--

---

K5	Explain how to introduce additional services or products to customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
----	---

---

K6	State how to give appropriate, balanced information to customers about services or products
----	---

---



**UNIT 274 (2GEN7)**

**DEAL WITH CUSTOMERS  
ACROSS A LANGUAGE  
DIVIDE**

**Successful assessment of the unit proves  
that the learner has achieved the national  
occupational standard to deal with  
customers across a language divide**

**August 2010 Version 1.0**



## **DEAL WITH CUSTOMERS ACROSS A LANGUAGE DIVIDE**

---

Customer service is frequently delivered across a language divide. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to your customer's first language. You should choose this unit if you frequently deal across a language divide. Remember, customers can be both external and internal to your organisation.

This unit has **three** outcomes:

### **Outcome 1**

Prepare to deal with customers with a different first language

### **Outcome 2**

Deal with customers with a different first language to your own

### **Outcome 3**

Know how to deal with customers across a language divide

# DEAL WITH CUSTOMERS ACROSS A LANGUAGE DIVIDE

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

## What you must do

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

## PREPARE TO DEAL WITH CUSTOMERS WITH A DIFFERENT FIRST LANGUAGE (OUTCOME 1)

**Shaded numbers must be observed**

	1	2	3	4
<b>1</b> Identify the language or languages other than their own that they are most likely to come across when <b>dealing with customers</b>	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>2</b> Learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>3</b> Identify a source of assistance with a language they expect to encounter when delivering customer service	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>4</b> Agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>5</b> Log useful words and phrases to support their dealings with a customer with a different first language	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

## What you must cover

You must show that you have covered **ALL** of the following:

### Dealing with customers across a language divide

All must be covered.

1	During routine delivery of customer service	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
2	During a busy time in your job	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
3	During a quiet time in your job	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

- 
- 6** Learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently **C C C C C**
- 

**DEAL WITH CUSTOMERS WITH A DIFFERENT FIRST LANGUAGE TO THEIR OWN** (OUTCOME 2)

**Shaded numbers must be observed**      **1   2   3   4**

- 
- 7** Identify the customer's first language and indicate to the customer that they are aware of this **C C C C C**
- 

- 8** Establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs **C C C C C**
- 

- 9** Speak clearly and slowly if using a language which is not the first language for either them or their customer **C C C C C**
- 

- 10** Maintain a consistent tone and volume when dealing with somebody across a language divide **C C C C C**
- 

- 11** Listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words **C C C C C**
- 

- 
- 12** Check their understanding of specific words with their customer using questions for clarification **C C C C C**
- 

- 13** Seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers **C C C C C**
- 

- 14** Reword a question or explanation if their customer clearly does not understand their original wording **C C C C C**
- 

- 15** Use a few words of their customer's first language to create a rapport **C C C C C**
-

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

### **Know how to deal with customers across a language divide** (OUTCOME 3) **Ref.**

---

- K1 List the languages that they are most likely to encounter among groups of their customers

---

- K2 State how to greet, thank and say farewell to customers in their first languages

---

- K3 Explain the importance of dealing with customers in their first language if possible

---

- K4 Describe how to explain to a customer that they cannot hold an extended conversation in their first language

---

- K5 Explain the importance of tone, pace and volume when dealing with customers across a language divide

---

- K6 Identify possible sources of assistance to use when a language barrier demands additional language skills

---



**UNIT 275 (2GEN8)**

## **MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER**

**Successful assessment of the unit proves that the learner has achieved the national occupational standard to maintain customer service through effective handover**

**August 2010 Version 1.0**



# **MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER**

---

Customer service delivery in a team involves many situations when you are unable to see actions through and you pass on responsibility to a colleague, for example, during a shift change. This sharing of responsibility should be organised and follow a recognised pattern. Most of all you need to be sure that, when responsibility is passed on, the actions are seen through. This involves routinely checking with your colleagues that customer service actions have been completed. This unit is for you if your job involves service delivery as part of a team and you regularly pass on responsibility for completion of a customer service action to a colleague.

This unit has **three** outcomes:

## **Outcome 1**

Agree joint responsibilities in a customer service team

## **Outcome 2**

Check that customer service actions are seen through by working together with colleagues

## **Outcome 3**

Understand how to maintain customer service through effective handover

# MAINTAIN CUSTOMER SERVICE THROUGH EFFECTIVE HANDOVER

## Evidence

This space is to record the evidence you need to do to complete this unit. The criteria that you should be able to complete are within the learning outcomes.

No.	Method*	Summary of evidence or portfolio reference	Assessor initials
1			
2			
3			
4			

Photocopy if required

\***Assessment method key:** **O** Observation; **PD** Professional discussion; **Q** Questioning; **WP** Work product; **WT** Witness testimony; **Oth** Other

**What you must do**

You must show that you can perform consistently to the same standard. This will be assessed by your assessor using various methods which **must** include observation of your performance.

**AGREE JOINT RESPONSIBILITIES IN A CUSTOMER SERVICE TEAM**

(OUTCOME 1)

Shaded numbers must be observed	1	2	3	4
<b>1</b> Identify services or products they are involved in delivering that rely on effective teamwork	C	C	C	C
<b>2</b> Identify steps in the <b>customer service</b> delivery process that rely on exchange of information between them and their colleagues	C	C	C	C
<b>3</b> Agree with colleagues when it is right to pass responsibility for completing a customer service action to another	C	C	C	C
<b>4</b> Agree with colleagues on how information should be exchanged between them to enable another to complete a customer service action	C	C	C	C
<b>5</b> Identify ways of reminding themselves when they have passed responsibility to a colleague for completing a customer service action	C	C	C	C

**What you must cover**

You must show that you have covered **ALL** of the following:

**Maintaining customer service through effective handover**

All must be covered.

1	During routine delivery of customer service	C	C	C	C
2	During a busy time in your job	C	C	C	C
3	During a quiet time in your job	C	C	C	C
4	When people, systems or resources have let you down	C	C	C	C

---

**CHECK THAT  
CUSTOMER SERVICE  
ACTIONS ARE SEEN  
THROUGH BY WORKING  
TOGETHER WITH  
COLLEAGUES** (OUTCOME 2)

---

Shaded numbers must be observed	1	2	3	4
<b>6</b> Access reminders to identify when to check that a customer service action has been completed	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>7</b> Ensure that they are aware of all details of customer service actions their colleague was due to complete	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>8</b> Ask their colleague about the outcome of them completing the customer service action as agreed	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>9</b> Identify the next customer service actions if their colleagues have been unable to complete the actions they had previously agreed	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>
<b>10</b> Work with colleagues to review the way in which customer service actions are shared	<b>C</b>	<b>C</b>	<b>C</b>	<b>C</b>

---

---

## What you must know

---

Evidence for this section can be collected in a variety of ways. Your assessor will discuss with you how to collect and record this information.

**Understand how to maintain customer service through effective handover** (OUTCOME 3) **Ref.**

---

K1 Explain their organisation's customer service procedures for the services or products they are involved in delivering

---

K2 Identify the appropriate colleagues to pass responsibility to for completing particular customer service actions

---

K3 Describe ways of ensuring that information is passed between them and their colleagues effectively

---

K4 Identify ways to remind themselves of actions that need to be checked when they have passed on responsibility to a colleague

---

K5 Explain the importance of checking tactfully with a colleague whether they have completed the customer service actions they were expecting

---

K6 Identify opportunities for contributing to review the way customer service actions are shared in customer service processes

---



# Appendix 1      Summary of City & Guilds assessment policies

## **Health and Safety**

All N/SVQ centres have to make sure that they provide a safe and healthy environment for training, including induction and assessment. City & Guilds external verifiers check this when they visit assessment sites.

You are responsible for making sure that you understand, and comply with, the Health and Safety practice and policies in the workplace where you will be assessed. Your assessment may be stopped if you do not comply, and your assessor will explain the reason why to you. You may need to retake your assessment at a later date.

## **Equal Opportunities**

Your centre will have an equal opportunities policy. Your centre will explain this to you during your induction, and may give you a copy of the policy.

City & Guilds equal opportunities policy is available from our website **[www.cityandguilds.com](http://www.cityandguilds.com)**, City & Guilds Customer Relations Team or from your centre.

## **Access to assessment**

City & Guilds qualifications are open to all learners, whatever their gender, race, creed, age or special needs. Some learners may need extra help with their assessment, for example, a person with a visual impairment may need a reader.

If you think you will need alternative assessment arrangements because you have special assessment requirements, you should discuss this with your centre during your induction, and record this on your assessment plan. City & Guilds will allow centres to make alternative arrangements for you if you are eligible and if the qualification allows for this. This must be agreed before you start your qualification.

City & Guilds guidance and regulations document *Access to assessment and qualifications* is available on the City & Guilds website **[www.cityandguilds.com](http://www.cityandguilds.com)**, from the City & Guilds Customer Relations Team or your centre.

## **Complaints and appeals**

Centres must have a policy and procedure to deal with any complaints you may have. For example, you may feel you have not been assessed fairly, or may want to appeal against an assessment decision if you do not agree with your assessor.

These procedures will be explained during induction and you will be provided with information from the Quality Assurance Co-ordinator within your centre who is responsible for this.

Most complaints and appeals can be resolved within the centre, but if you follow the centre procedure and are still not satisfied you can contact City & Guilds.

Our complaints policy is on our website **[www.cityandguilds.com](http://www.cityandguilds.com)** or is available from the City & Guilds Customer Relations Team or your centre.

## Appendix 2      Observation sheets

# Observation sheet - Food and Beverage Service



<b>Learner:</b>	<b>Assessor:</b>	<b>Ref:</b>
-----------------	------------------	-------------

**Activity observed**

**101/1GEN1**

- 1 Personal Hygiene(204.1)
- 1,2 Clean smart footwear
- 3.Clean smart headgear
- 8.Follow health, hygiene and safety practices

**104/1GEN4**

- 4.Plan work/tasks
- 5.Organise work effectively
- 6.Clean tidy work areas
- 7.Keep waste to a minimum
- 9.Work to deadlines

**201/2GEN1**

- 2.Greet customers
- 3.Respect/friendly
- 3.Customer valued
- 4. Customer expectation identified
- 5.Courteous
- 6.Keep informed
- 7.Adapt to different behaviour
- 8.Respond promptly and positively
- 14.Provide information
- 15. Check customer understanding

**204/2GEN4**

- 4.Wash hands
- 3.Change clothes
- 8.Surfaces and equipment are clean
- 15 Food within use by date & undamaged
- 16.Store food correctly
- 20.Follow stock rotation
- 23.Protect food from hazards
- 25.Maintained time temperature for food safety

<b>Duration of assessment</b>	<b>Service period</b>	Breakfast	Lunch	Dinner	Function
<b>Number of covers</b>	<b>Type of service</b>	a la carte	Table d hote	Function	
Counter.....					

**Observation sheet - Food and Beverage Service**

**Questions asked during observation with answers**

---

---

**Feedback**

---

Learner signature.....

Assessor signature..... Date: .....

<b>Observation sheet - Candidate:</b>	<b>Assessor:</b>	<b>Ref:</b>
---------------------------------------	------------------	-------------

**Activity observed**

**101/1GEN1**

- 1 Personal Hygiene(204.1)
- 1,2 Clean smart footwear
- 3.Clean smart headgear
- 8.Follow health, hygiene and safety practices

**102/1GEN2**

- 2. Clean knives
- 3.Sharpen knives
- 4. Knife appropriate to task
- 6.Knives used safely
- 7.Knives cleaned and stored correctly

**OPTIONAL UNITS**

- 1. Check ingredients are fir for preparation/cooking
- 02. Check & use correct techniques ,tools and equipment
- 03. Combine the food to meet requirements
- 04 Cook food to meet requirements of the dish
- 0 5/7Finish food as required for the dish
- 0 6. Ensure dish is at correct temperature for holding& storing
- 8. Safely store food not for immediate use

**104/1GEN4**

- 4.Plan work/tasks
- 5.Organise work effectively
- 6.Clean tidy work areas
- 7.Keep waste to a minimum
- 9.Work to deadlines

**203/2GEN3**

- 5.Wash hands
- 4..Change clothes
- 9.Surfaces and equipment are clean
- 10.Clean clothes used
- 18. Food within use by date & undamaged
- 20.Prepare food for storage
- 21. Store food quickly
- 23 Avoid cross contamination
- 27 Check food for hazards
- 29. Avoid allergic contamination
- 30. Prevent contamination across different types of food
- 31. Time and temperature

<b>Duration of assessment</b>	<b>Service period</b>	Breakfast	Lunch	Dinner	Function
<b>Number of covers</b>	<b>Type of service</b>	a la carte	Table d hote	Function	
Counter... ..					

## Observation sheets - Cookery

Questions asked during observation with answers

---

---

Feedback

---

Learner signature..

Assessor signature..

Date:

## Observation sheet – Front of House - Reception

<b>Candidate:</b>	<b>Assessor:</b>	<b>Ref:</b>
-------------------	------------------	-------------

**Activity observed**

### 101/1GEN1

- O 1 Personal Hygiene(204.1)
- O 1,2 Clean smart footwear
- O 3.Clean smart headgear
- O 8.Follow health, hygiene and safety practices

### 104/1GEN4

- O 4.Plan work/tasks
- O 5.Organise work effectively
- O 6.Clean tidy work areas
- O 7.Keep waste to a minimum
- O 9.Work to deadlines

### 201/2GEN1

- O 2.Greet customers
- O 3.Respect/friendly
- O 3.Customer valued
- O 4. Customer expectation identified
- O 5.Courteous
- O 6.Keep informed
- O 7.Adapt to different behaviour
- O 8.Respond promptly and positively
- O 14.Provide information
- O15. Check customer understanding

<b>Duration of assessment</b>	Activity	Check in	Check out
<b>Number of customers</b>			

**Observation sheet – Front of House - Reception**

**Questions asked during observation with answers**

---

---

**Feedback**

---

Learner signature.....

Assessor signature..... Date: .....

# Observation sheet – Diploma in Housekeeping

<b>Candidate:</b>	<b>Assessor:</b>	<b>Ref:</b>
-------------------	------------------	-------------

**Activity observed**

### 101/1GEN1

- 1 Personal Hygiene(204.1)
- 1,2 Clean smart footwear
- 3.Clean smart headgear
- 8.Follow health, hygiene and safety practices

### 104/1GEN4

- 4.Plan work/tasks
- 5.Organise work effectively
- 6.Clean tidy work areas
- 7.Keep waste to a minimum
- 9.Work to deadlines

### 264/2HK1

- 1. Prepare bathroom/toilet area
- 2. Select equipment & materials
- 3. Clean toilet correct sequence
- 4 Clean bathroom correct sequence
- 5. Clean floors, walls &other areas correct sequence
- 8 Prepare furnished area
- 11. Clean floor/furnishing
- 17. PPE worn
- 18. Dispose of waste
- 19 Sanitise waste containers

---

### Duration of assessment

**Number of rooms serviced**

**Type of service**

**new arrival**

**Stay over**

---

---

**Feedback**

---

Learner signature..... Date:.....

Assessor signature..... Date: .....

## Useful contacts

### UK learners

General qualification information

T: +44 (0)844 543 0033

E: [learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)

---

### International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: [intcg@cityandguilds.com](mailto:intcg@cityandguilds.com)

---

### Centres

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)

---

### Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: [singlesubjects@cityandguilds.com](mailto:singlesubjects@cityandguilds.com)

---

### International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [intops@cityandguilds.com](mailto:intops@cityandguilds.com)

---

### Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: [walledgarden@cityandguilds.com](mailto:walledgarden@cityandguilds.com)

---

### Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: [business\\_unit@cityandguilds.com](mailto:business_unit@cityandguilds.com)

---

### Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: [feedbackandcomplaints@cityandguilds.com](mailto:feedbackandcomplaints@cityandguilds.com)

---

**Published by City & Guilds**  
**1 Giltspur Street**  
**London**  
**EC1A 9DD**  
**T +44 (0)844 543 0033**  
**F +44 (0)20 7294 2413**  
**[www.cityandguilds.com](http://www.cityandguilds.com)**

City & Guilds is a company registered  
in England and Wales (company  
number 16513878)

**Stock code: TS-01-7132**