

Unit 305 Manage and evaluate customer relations

Unit summary

Deliver, evaluate and improve services to meet customer needs. Customers may be internal or external to the organisation.

Skills

You will apply the following skills:

- Interpersonal skills
- Questioning
- Listening
- Negotiating
- Managing time
- Monitoring
- Evaluating
- Problem solving

Performance indicators

You will:

Identify customer needs and expectations

1. Build positive working relationships with customers
2. Identify and confirm customer needs
3. Agree timescales and quality standards with customers, and the procedures to follow if these are not achieved

Deliver services

4. Provide services to agreed timescales and quality standards
5. Check customer needs and expectations are met
6. Resolve or refer complaints in a professional manner and to a given timescale

Monitor and evaluate services

7. Obtain and record customer feedback
8. Analyse and evaluate customer feedback
9. Take action to improve customer relations

Knowledge

You will know:

1. What is meant by 'customer' and who your customers are
2. Why effective and efficient customer service is important
3. How to build positive working relationships with customers
4. Why it is important to identify and confirm customer needs
5. The types of quality standards that are appropriate to your responsibilities
6. How to set and meet timescales and quality standards with customers
7. Why it is important to monitor customer satisfaction and how to do so
8. The types of problems that customers may experience and how to solve them
9. The complaints procedures you should follow and when
10. The techniques for collecting and analysing customer feedback
11. Why continuous improvement is important

Evidence Requirements

This section is aimed at the assessor and sets out the evidence requirements for this unit.

1. Evidence for this unit is generated when your candidate is carrying out real work in a private sector organisation, not-for-profit organisation or public service organisation whether full-time or part-time, paid or voluntary.
2. A Realistic Working Environment or Simulation is not allowed for this unit.
3. Evidence must show that your candidate has consistently met the standard over a sufficient period of time for you to consider the candidate competent.
4. You may use the following assessment methods when assessing this unit:

Performance evidence	Observation	Yes
	Examination of work products	Yes
Supplementary evidence	Witness testimony	Yes
	Questions *	Yes

* This includes verbal and written questioning, questionnaires, work based tasks, reflective accounts, case studies, professional discussion and feedback reports.

5. Your candidate needs to show that they:

Identify customer needs and expectations. Evidence may include:

- Complaints record
- Customer feedback records
- Letters
- Telephone logs

- Emails
- Training records
- Records of communications with customers
- Questionnaires
- Evaluation reports
- Management report

Deliver services. Evidence may include:

- Records of communications with customers, colleagues and suppliers
- Memos
- Letters
- Telephone logs
- Emails
- Suggestions
- Minutes of meetings
- Professional development plan
- Continuous professional development records
- Feedback reports
- Customer feedback log

Monitor and evaluate services. Evidence may include:

- Records of communications with customers, colleagues and suppliers
- Memos
- Letters
- Telephone logs
- Emails
- Suggestions
- Minutes of 1-1 meetings
- Minutes of team meetings
- Professional development plan
- Continuous professional development records
- Feedback reports
- Customer feedback logs
- Customer satisfaction survey
- Evaluation reports
- Analysed customer information

6. Contingencies

Performance Indicator 6	If no problems or complaints arise during the assessment period professional discussion or dedicated tasks may be used to confirm competence
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7. Evidence generated for this unit may contribute towards Unit 301:

- Communicate information
- Plan and be accountable for your work
- Improve your own performance
- Behave in a way that supports effective working

and Unit 302

- Work to achieve your organisation's purpose and values
- Support sustainability
- Support diversity
- Maintain security and confidentiality
- Assess and manage risk