

<b>Unit Title:</b>	<b>Build and maintain effective customer relations</b>
OCR unit number	B15
Level:	4
Credit value:	8
Guided learning hours:	53

## Unit purpose and aim

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Building and developing effective customer relations is a vital aspect of customer service. Strong customer relations will help the learners' organisation to identify and understand their customers' expectations, encourage a way of working that is based on partnership and mutual trust, and establish and maintain customer loyalty. This unit is about establishing and maintaining such relations. For some organisations this means encouraging loyalty and repeat business from large numbers of customers. For others it is all about nurturing and relating to a smaller number of valued customers who make an important strategic contribution to the organisation's success. This unit is for the learner only if they are in a position to influence the way their organisation determines the level of service offered to different customers.

Learning Outcomes	Assessment Criteria	Knowledge, Understanding and Skills
<p><b>The Learner will:</b></p> <p>1 establish effective customer relations</p>	<p><b>The Learner can:</b></p> <p>1.1 identify the types of customers with whom they should build longer term customer relations and promote loyalty</p> <p>1.2 communicate with these customers so that they know they are important to the organisation</p> <p>1.3 explain their role, the purpose of making contact and the mutual benefits of building a longer term relationship</p> <p>1.4 make it clear that they welcome two-way communication about customer expectations</p>	<p>Candidates should have an understanding of:</p> <p>The policies, procedures and practices of their organisation relating to the delivery of services or products to customers.</p> <p>Typical customers of their organisation eg:</p> <ul style="list-style-type: none"> <li>• internal and external</li> <li>• ages</li> <li>• gender</li> <li>• location</li> <li>• cultural differences</li> <li>• specialist groups</li> <li>• regular customers.</li> </ul> <p>How to build long-term customer relationships,</p>

		understand and communicate mutual benefits of this, promote two-way communication and customer loyalty.
2 maintain and develop effective customer relations	<p>2.1 keep customers informed and accept criticism from customers openly and constructively</p> <p>2.2 regularly assess whether customer expectations are being consistently met</p> <p>2.3 use their influence and authority in their own organisation to ensure that customer needs are being met and, where possible, exceeded</p> <p>2.4 collect feedback from customers and staff to ensure that solutions are being provided that result in customer satisfaction</p> <p>2.5 analyse customer relations and propose changes that will develop longer term loyalty to people with authority in their organisation</p>	<p>Candidates should have an understanding of:</p> <p>The policies, procedures and practices of their organisation relating to the delivery of services or products to customers.</p> <p>How their own role in the organisation complements these policies, procedures and practices and the limits of their authority in ensuring customer needs are met and/or exceeded.</p> <p>How to regularly assess whether customer expectations are being met.</p> <p>How to encourage and accept feedback, including criticism, from customers and agree solutions resulting in customer service satisfaction.</p> <p>How to analyse the effect of their organisation/department's customer relations and who in authority can be approached to propose changes and developments.</p>
3 understand how to build and maintain customer relations	<p>3.1 identify and prioritise types of customers with whom they should be building a longer term relationship</p> <p>3.2 describe the most appropriate method of establishing relationships with customers targeted for longer term relationships</p> <p>3.3 explain the importance of effective communication skills when dealing with customers</p>	<p>Candidates should have an understanding of:</p> <p>The policies, procedures and practices of their organisation relating to the delivery of services or products to customers.</p> <p>How their own role in the organisation complements these policies, procedures and practices.</p>

	<p>3.4 explain how to explore and agree with customers the mutual benefits of maintaining and developing a longer term relationship</p> <p>3.5 explain how to communicate with customers, especially when they are dissatisfied with products and services</p> <p>3.6 explain how to negotiate with customers in a way that balances customer expectations with the expectations of their own organisation</p> <p>3.7 describe the types of compromises that would be acceptable to their organisation when meeting customer expectations</p> <p>3.8 explain how to use their influence and authority in their organisation to meet or exceed customer expectations</p> <p>3.9 describe methods of monitoring customer satisfaction appropriate to their level of authority in the organisation</p>	<p>How to build long-term customer relationships, understand and communicate mutual benefits of this, promote two-way communication and customer loyalty.</p> <p>Candidates must be able to explain:</p> <ul style="list-style-type: none"> <li>• appropriate methods for establishing initial and long-term relationships with customers</li> <li>• the importance of using effective communication skills when dealing with customers eg, appropriate body language and behaviour; knowledge of products and services</li> <li>• how to put into practice the organisation's policies and procedures relating to customer dissatisfaction</li> <li>• how to balance customer and organisational expectations when negotiating with customers and what compromises it is possible to make</li> <li>• their own influence and limits of authority in meeting or exceeding customer expectations</li> <li>• appropriate methods of monitoring customer satisfaction in their organisation.</li> </ul>
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## Assessment

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Specified in the Customer Service Assessment Strategy 2010

## Evidence requirements

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1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2. You may collect the evidence for the Unit through work in a private sector organisation, a not - for - profit organisation or a public services organisation.

3. You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.

4. You must provide evidence that you can build and maintain relationships with:

a potential or new customers

b existing customers

c customers with particular needs and expectations

d customers who have experienced problems with your organisation's services

or products.

4. Your communication with customers may be face to face, in writing, by telephone, text message, e - mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

5. You must provide evidence that you have collected feedback that is:

- qualitative
- quantitative
- formal
- informal.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website:  
[www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)