

<b>Unit Title:</b>	<b>Technical advice and guidance</b>
OCR unit number:	26
Unit reference number:	J/601/3507
Level:	3
Credit value:	12
Guided learning hours:	75

Evidence for this unit can only be achieved through actual work in a work environment. Simulation is not permissible for any competence based unit.

## Unit aim

This unit provides an understanding of the context for providing technical advice and guidance. It also covers practical provision of both reactive and proactive advice and guidance.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Understand the context for providing technical advice and guidance</p>	<p><b>The Learner can:</b></p> <p>1.1 Describe how technical advice and guidance can be used to:</p> <ul style="list-style-type: none"> <li>• resolve problems</li> <li>• improve performance</li> </ul> <p>1.2 Describe the types, sources and applicability of information which can form the basis of technical advice and guidance:</p> <ul style="list-style-type: none"> <li>• information from reference sources (e.g. manuals, handbooks, manufacturer's specifications)</li> <li>• information derived from the analysis of data (e.g. trend analysis, fault logs)</li> <li>• online information (e.g. manufacturer's websites, technical fora, discussion groups)</li> </ul>	<ul style="list-style-type: none"> <li>• the needs of their customers and establish what advice and guidance they require and how it will be delivered</li> <li>• technical knowledge that defines the information used for advice and guidance</li> <li>• how to gather technical information from products and services to include: specifications, features, maintenance procedures, life-cycle management</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>1.3 Describe the procedures and constraints which can apply to the provision of technical advice and guidance (e.g. escalation, commercial/contractual, legal/regulatory, information security)</p> <p>1.4 Identify circumstances where technical advice and guidance should be provided proactively rather than reactively in response to customer requests (e.g. to rectify known faults, to provide new functionality)</p>	
<p>2 Provide reactive technical advice and guidance to customers on a range of topics</p>	<p>2.1 Determine the purposes for which technical advice and guidance is required</p> <p>2.2 Verify that customers are entitled to receive the requested technical advice and guidance</p> <p>2.3 Communicate effectively with customers to elicit sufficient information to enable correct technical advice and guidance to be provided</p> <p>2.4 Source and interpret relevant technical information to produce advice and guidance in response to customer requests</p> <p>2.5 Communicate technical advice and guidance to customers in a format and style which meets their needs, confirming customer understanding of the information provided</p> <p>2.6 Follow organisational procedures for responding to customer requests including the timely escalation of those for which technical advice and guidance can not be provided or does not resolve the request</p>	<ul style="list-style-type: none"> <li>• how to gather technical information from a range of sources e.g. reference manuals, knowledge repositories, historical data, peer and customer meetings, trade journals, training courses.</li> <li>• the different constraints that have to be considered when providing technical advice and guidance</li> <li>• recommend occasions where organisational policies should be suspended or adapted</li> <li>• how to communicate technical information e.g.: <ul style="list-style-type: none"> <li>- who the correct person is to receive the information</li> <li>- use a suitably agreed format</li> <li>- record the information communicated</li> <li>- audit and quality check the information as at the date of the communication</li> <li>- ensure the information is sufficient for the customer needs</li> <li>- prepare customer documentation to recognised quality standards</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
3 Provide proactive technical advice and guidance to customers	3.1 Identify the purposes for which the technical advice and guidance is required 3.2 Identify the customers, and their level of technical knowledge, to whom the technical advice and guidance should be provided 3.3 Develop technical advice and guidance in a format and style which takes into account the customers' level of technical knowledge 3.4 Follow organisational procedures for providing proactive technical advice and guidance	<ul style="list-style-type: none"> <li>• how to identify:               <ul style="list-style-type: none"> <li>- a range of customer types</li> <li>- the purpose of the technical advice and guidance</li> </ul> </li> <li>• how to support customers in a manner that meets their individual requirements, following organisational procedures</li> </ul>

## Assessment

It is the assessor's role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has finished a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future. Evidence of questions must include a written account of the question and the candidate's response. Observations and/or witness testimonies must be detailed and put the evidence into context i.e. the purpose of the work etc.

In addition to the recognition of other qualifications, candidates may claim accreditation of prior achievement for any of the elements assessment criteria or complete units of competence, as long as the evidence fully meets the criteria and the candidate can prove that it is all their own work. It is important also that assessors are convinced that the competence claimed is still current. If the assessors have some doubts, they should take steps to assess the candidate's competence directly. An initial assessment of candidates is recommended.

All the learning outcomes and assessment criteria must be clearly evidenced in the submitted work, which is externally moderated by OCR.

Results will be Pass or Fail.

## Guidance on assessment

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Evidence can reflect how the candidate carried out the process or it can be the product of a candidate's work or a product relating to the candidate's competence.

For example: The process that the candidate carries out could be recorded in a detailed personal statement or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the unit.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through
- candidate responses must be recorded

It is difficult to give a detailed answer to how much evidence is required as it depends on the type of evidence collected and the judgement of assessors. The main principles, however, are as follows: for a candidate to be judged competent in a unit, the evidence presented must satisfy:

- all the items listed, in the section 'Learning Outcomes'
- all the areas in the section 'Assessment Criteria'

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

## Additional information

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