

Unit Title:	Develop customer relationships
Unit number	D1
Level:	2
Credit value:	6
Guided learning hours:	40

Unit purpose and aim

When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer's confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation's service and being comfortable with it. The learner's customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will: 1 Build their customer's confidence that the service they give will be excellent	The Learner can: <ul style="list-style-type: none"> 1.1 Show that they behave assertively and professionally with customers 1.2 Allocate the time they take to deal with their customer following organisational guidelines 1.3 Reassure their customer that they are doing everything possible to keep the service promises made by the organisation 	Candidates must have an understanding of: <ul style="list-style-type: none"> • How they can build their customer's confidence in their service delivery
2 Meet the expectations of their customers	<ul style="list-style-type: none"> 2.1 Recognise when there may be a conflict between their customer's expectations and your organisation's service offer 2.2 Balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer 	Candidates must have an understanding of: <ul style="list-style-type: none"> • How customer expectations are formed • The types of expectations customers have • Why they may not be able to meet their customer's expectations

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	2.3 Work effectively with others to resolve any difficulties in meeting their customer's expectations	<ul style="list-style-type: none"> How they would address any conflict between the expectations of the customer and organisational service offer
3 Develop the long-term relationship between their customer and their organisation	<p>3.1 Give additional help and information to their customer in response to customer questions and comments about their organisation's services or products</p> <p>3.2 Discuss expectations with their customer and explain how these compare with their organisation's services or products</p> <p>3.3 Advise others of feedback received from their customer</p> <p>3.4 Identify new ways of helping customers based on the feedback customers have given them</p> <p>3.5 Identify added value that their organisation could offer to long-term customers</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> How to provide additional help and information to a customer when required What information and help they can provide The importance of providing feedback from customers and who to refer it to Ways of improving the customer service offer based on feedback from customers Added value and how this would benefit customers
4 Know how to develop customer relationships	<p>4.1 Describe their organisation's services or products</p> <p>4.2 Explain the importance of customer retention</p> <p>4.3 Explain how their own behaviour affects the behaviour of the customer</p> <p>4.4 Describe how to behave assertively and professionally with customers</p> <p>4.5 Describe how to defuse potentially stressful situations</p> <p>4.6 Identify the limitations of their organisation's service offer</p> <p>4.7 Compare how customer expectations may change as the customer deals with their organisation</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> The services and products offered by their organisation Why it is important to meet customer expectations and retain their customers How to behave assertively and professionally with a customer How their behaviour influences the customer How to identify stressful situations and how to deal with them The limits of the service offered by their organisation How customer expectations can be influenced by their association with the organisation

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	4.8 Identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations 4.9 Explain the cost implications of bringing in new customers as opposed to retaining existing customers 4.10 Identify who to refer to when considering any variation to their organisation's service offer	<ul style="list-style-type: none"> • The implications of meeting or exceeding customer expectations • The cost implications of acquiring new customers as opposed to retaining existing customers • The limits of their authority when a service offer needs to be varied and who to refer to

Assessment

This qualification is internally assessed by centre staff and externally verified by OCR Assessors.

Evidence requirements

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. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook which can be downloaded from the OCR website: www.ocr.org.uk.*)
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 with different customers on different occasions for your assessor to be confident that you are competent.
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 of taking actions to meet the needs and expectations of your customer and of your organisation:
 - a without being asked by your customer
 - b at your customer's request.
6. You must include evidence that you have balanced the needs of your customers and your organisation by:
 - a making use of alternative products or services offered by the organisation
 - b varying the service you would normally offer within organisational guidelines
 - c saying 'no' to your customer and explaining the limits of your organisation's service offer.

Guidance on assessment and evidence requirements

Please refer to the OCR Customer Service Centre Handbook available from the OCR website www.ocr.org.uk.

National Occupational Standards (NOS) mapping/signposting

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

Additional information

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