

COGSIGN23

Receive, interpret and confirm client instructions



Overview

This unit deals with the following:

1. Receive and confirm client instructions
2. Interpret specifications and agree work to be carried out
3. Provide advice about sign products and services

During this work you must take account of the relevant operational requirements and safe working practices AS THEY APPLY TO YOU.

Previous Version: Unit 3.03 National Occupational Standards in Signmaking (CWP1)

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Performance criteria

- You must be able to:*
- P1 record instructions using appropriate documentation and/or computer systems according to organisational requirements
 - P2 identify and clarify omissions and inconsistencies with the relevant personnel and record accurately
 - P3 inform relevant personnel where problems in meeting client needs are anticipated and suitable alternatives are discussed and agreed
 - P4 acknowledge instructions according to organisational requirements
 - P5 treat clients politely and in a manner which promotes goodwill
 - P6 follow relevant health and safety and environmental requirements and legislation at all times
 - P7 assess client needs and extract relevant details
 - P8 translate client needs into information to enable process specifications to be created
 - P9 develop process specifications to meet client and organisational requirements
 - P10 identify problems in meeting client needs, clarify with the relevant personnel and if changes are required, identify suitable alternatives for discussion with the client
 - P11 present to and agree with the client, final/amended specifications
 - P12 record relevant information accurately and legibly and forward to the relevant personnel
 - P13 ensure that enquiries accepted, conform to organisational capabilities and requirements
 - P14 identify and agree client needs with the client, before continuing with any advice
 - P15 provide advice only to authorised people and follow data protection legislation
 - P16 compare client needs with sign products and services offered by the organisation
 - P17 ensure that all information used is relevant, current, accurate and suitable to meet identified needs
 - P18 describe accurately the features, advantages and benefits of sign products and services to the client
 - P19 advise the client of the most appropriate product or service to meet the agreed needs
 - P20 provide advice which is appropriate to the client's needs
 - P21 refer to the relevant person any requests which are outside your responsibility
 - P22 record advice given to the client using appropriate documentation
 - P23 ensure that records are stored appropriately and meet security and confidentiality requirements

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Knowledge and understanding

You need to know and understand:

- K1 how to collect and record information
- K2 why it is important to identify and clarify omissions and inconsistencies in information
- K3 how to communicate with clients and other personnel
- K4 signmaking terminology specific to the process
- K5 what types of information is required
- K6 documentation procedures and how they are completed
- K7 organisational procedures and practices
- K8 types of specification and how they are interpreted
- K9 production processes and terminology - design, manufacture, installation
- K10 different types of sign materials and their characteristics
- K11 who are the relevant personnel
- K12 who is regarded as a client and why
- K13 what problems may occur
- K14 what is the appropriate action to take if there are problems
- K15 what legislation and organisational codes of practice are relevant
- K16 what are the consequences of not following legislation and organisational requirements
- K17 what health and safety and environmental requirements and legislation are relevant and how to follow them
- K18 how to extract and translate client specification details
- K19 importance of good communications
- K20 how to develop process specifications
- K21 importance of understanding material specifications
- K22 different types of process specifications and how they are prepared
- K23 production processes and terminology – specific to the process
- K24 signmaking qualities specification and suitability for different types of work
- K25 what are the consequences to you and to others of not following Health and Safety and environmental legislation
- K26 how to identify and agree what information will meet customer needs
- K27 who are authorised and unauthorised personnel
- K28 how to identify and compare and contrast different methods of providing advice to arrive at the most appropriate method
- K29 how to identify and compare and contrast different types of information to arrive at the most appropriate information
- K30 how to access and obtain technical information on equipment condition and materials and non-technical information on the signmaking environment and production issues
- K31 what communication values are important to the organisation
- K32 how to determine appropriate organisational values relating to effective

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- communication (e.g. honesty, openness)
- K33 how to identify and compare and contrast features, benefits and advantages of sign products and services within responsibility
- K34 how to maintain and develop relationships
- K35 how to record information which is complete and accurate and knowing when it is complete and accurate
- K36 which recording methods and storage places to use and why and how to use them
- K37 what the consequences are for you and the organisation of not maintaining security and confidentiality in line with relevant legislation

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Additional Information

Glossary

Instructions

From sales and clients, in writing, verbally, electronically, new work, variations

Organisational Requirements

Policies, procedures

Client

Customer – either internal or external

Client Needs

Price, quantity, delivery schedule, quality specification

Problems in Meeting Client Specifications

Availability of materials, current capacity, resources capability, sub- contractor availability and capability

Specifications for Work

New work, variations

Sources of Information

Internal, external

Methods of Providing Advice

Verbal, written, electronic

Types of Information

Text, numeric, images

Accepted Methods of Providing Information and Keeping Records

Pre-specified formats, non-pre- specified format

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Relevant Personnel

Sales personnel, supervisor, line manager, team leader etc.

Relevant Health and Safety and Environmental Requirements

What your responsibilities are in respect of health and safety and environmental requirements and legislation, regulations, safe working practices, local, national and organisational/site specific procedures

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Suite Signmaking

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