

Overview

This standard is for people who are required to develop and maintain positive relationships with clients and customers associated with installation and/or maintenance activities in the building services engineering sector in accordance with appropriate industry standards and regulations, the specification, working practices, the working environment and the natural environment

This standard is appropriate to the air conditioning, electrotechnical, consumer electrical and electronic products, heating & ventilating, plumbing, and refrigeration, industries.

The person undertaking the responsibility for establishing and maintaining client and customer relationships must be able to:

- present and provide accurate technical and functional information, advice and guidance
- liaise with clients and customers with respect to their needs and expectations
- respond as appropriate to client and customer needs and expectations

Performance criteria

- You must be able to:*
1. identify the clients and customers that need to be supplied with technical and functional information
 2. obtain the current and relevant technical and functional information that needs to be provided to the clients and customers
 3. provide accurate guidance and advice to the clients and customers on technical and functional matters associated with the building services engineering system that has been installed and/or maintained in terms of:
 - health and safety issues
 - safe and effective operation
 4. provide information in accordance with organisational procedures
 5. demonstrate to the clients and customers, as appropriate, the operation of the building services engineering system that has been installed and/or maintained
 6. confirm in relation to the installation and/or maintenance activity:
 - the client and customer expectations and requirements
 - the building services engineering system is in a satisfactory condition
 - the hand over process
 7. establish and maintain productive working relationships with clients and customers, including dealing with disagreements in an amicable and constructive way, so that good relationships are maintained
 8. respond effectively to requests for technical and functional information from clients and customers
 9. report, record and recommend, in accordance with organisational procedures and as appropriate, any variation to the installation and/or maintenance activity to the clients, customers and other relevant people
 10. comply with organisational standards for appearance and behaviour

Knowledge and understanding

You need to know and understand:

1. the importance of customer service in relation to installation and/or maintenance activity
2. how to identify the clients and customers that need to be supplied with technical and functional information
3. sources of technical and functional information such as:
 - the specification for the building services engineering system
 - the specification for the installation and/or maintenance activity
 - the manufacturer's instructions
4. the responsibilities and limitations of your job role with respect to supplying technical and functional information
5. the technical and functional information that you are providing and its implications on the operation of the building services engineering system and/or its equipment, accessories and components that have been installed and/or maintained
6. the organisational procedures and policies regarding the handover and demonstration of a building services engineering system and/or its equipment, accessories and components that have been installed and/or maintained
7. the operating principles, controls and settings of the building services engineering system and/or its equipment, accessories and components that have been installed and/or maintained importance of providing technical and functional information clearly, courteously and professionally
8. the methods and organisational procedures for establishing positive relations with clients and customers
9. the working requirements and practices of the clients and customers in the working environment where the installation and/or maintenance activity is taking place
10. which situations warrant written technical and functional information
11. the safety implications and operational consequences of supplying inaccurate or incomplete technical and functional information to clients and customers
12. methods of checking the clients' and customers' understanding of the technical and functional information provided
13. legislation regarding health and safety, data protection, equal

opportunities and regulations that affect the way that technical and functional information is delivered to clients and customers

14. the clients' and customers' rights including any contractual agreements

Scope/range related to performance criteria **Working environments (internal and/or external)**

- domestic
- non-domestic
 - commercial
 - industrial
 - agricultural
 - horticultural
 - leisure and entertainment
 - residential medical and care facilities
 - public highways and parks
 - public services establishments
 - pre-1919 traditional/historic buildings

Organisation procedures

- information management
- method statement
- project management
- risk assessment
- risk management
- implementing and monitoring health and safety requirements and issues
- implementing and monitoring issues relating to the natural environment
- customer services
- accident reporting
- emergencies
- communication with relevant people

Relevant people

- customers/clients
- client representatives
- supervisors
- site/contract manager
- other contractors/trades
- members of the public
- work colleagues

BSEBSE02

Establish and maintain relationships in the building services engineering sector



Glossary

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