

Developing and maintaining effective customer relationships

Overview

This standard identifies the competences you need to develop and maintain effective customer relationships, in accordance with the requirements of your organisation. You will be required to be positive and constructive in your dealings with customers, especially when dealing with disagreements. You will be expected to keep customers informed about work plans and activities which affect them, and to seek and obtain information from others when necessary, in a polite and courteous manner. You will respond in a timely and positive way when asked to provide help or information to customers.

Your responsibilities will require you to comply with any policies of your organisation in respect of developing and maintaining positive working relationships with clients and customers. You will be expected to work within the general policies of your organisation, and to know when to seek guidance and instructions from others. You will be expected to take full responsibility for your own actions and for the quality and accuracy of your work.

Your underpinning knowledge will provide a good understanding of the processes for developing and maintaining positive working relationships with customers, and will provide an informed approach to shaping your attitude and behaviour, to responding to the feelings and expectations of customers, and to using effective communications.

You will understand the safety and environmental precautions required when carrying out your duties and you will bear the precautions in mind when dealing with other people. You will also understand your responsibilities for health and safety in your place of work, and the importance of taking the necessary safeguards to protect yourself and others when you are working.

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Performance criteria

You must be able to:

1. establish and maintain effective and productive working relationships
2. communicate effectively with relevant people
3. resolve disagreements in an amicable and constructive way so that good relationships are maintained
4. keep others informed about work plans or activities which affect them
5. seek assistance from others in a polite and courteous way without causing undue disruption to normal working activities
6. respond in a timely and positive way when others ask for help or information

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Knowledge and understanding

You need to know and understand:

1. legislation regarding health and safety, data protection, equal opportunities and regulations that affect the way that the products and services you deal with are delivered to your customers
2. industrial, organisational and professional codes of practice, and ethical standards that apply
3. any contractual agreements that your customers have with your organisation
4. the customer's rights in relation to the services you are offering
5. the products or services of your organisation relevant to your customer service role
6. any organisational targets relevant to your job; your role in meeting them, and the implications for your organisation if those targets are not met
7. formal and informal methods of communication, and how to use the most appropriate one in different situations
8. how to communicate in a clear, polite, confident way, and why this is important
9. the need for customer confidentiality
10. your organisation's standards for appearance and behaviour
11. questioning techniques used to ensure the root of the problem is identified,
12. the ways in which views and opinions should be expressed
13. techniques for responding to the needs and feelings of others
14. how to deal with problems that could have an adverse effect on relationships or the business
15. the limits of your own authority, and when you need to seek agreement or permission from others

Scope/range

1. Establish and maintain working relationships with the following:
 1. external customers/clients

Plus two more from the following:

2. colleagues
3. supervisors
4. contractors
5. other companies

2. Respond to the individual needs of customers, to include both of the following:
 1. technically aware
 2. technically unaware
3. Use five of the following methods of communication when dealing with customers:
 1. face-to-face
 2. letters
 3. company documents
 4. telephone
 5. electronic mail
 6. virtual communication method
 7. other specific method
4. Establish effective customer relations by carrying out all of the following:
 1. meeting your organisation's standards for attitude and behaviour
 2. communicating with customers in a way that makes them feel valued and respected
 3. identifying and confirming the needs and expectations of the customer
 4. checking with the customer that you have fully understood their needs and expectations
 5. maintaining communication with customers to ensure that they are kept informed and reassured
 6. ensuring that all information passed to the customer is correct and up to date
 7. seeking advice from others on questions you cannot readily answer
 8. maintaining organisation ethics and legal responsibilities
 9. seeking assistance from others in a polite and courteous way
5. Respond appropriately to customers, to include three of the following circumstances:
 1. complaints about service or product
 2. information about work plans or activities that affect them
 3. problems which require clarification

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4. general questions and comments
5. feedback on work undertaken
6. Resolve disagreements by an appropriate amicable and constructive method, to include carrying out **three** of the following:
 1. identifying and confirming the needs and expectations of the customers
 2. checking with the customer that you have fully understood their needs and expectations
 3. explaining clearly to the customer any reasons why their needs or expectations cannot be met
 4. seeking guidance and instruction from the appropriate person if a resolution cannot be found
7. Ensure that you comply with organisation policy at all times, particularly in regard to all of the following:
 1. keeping correct records
 2. maintaining confidentiality
 3. obtaining authority to continue before working beyond agreed limits
 4. reporting any problem that you are unable to solve, to the appropriate person
8. Carry out regular checking of customers' opinions, through two of the following:
 1. verbal responses
 2. customer surveys
 3. letters from customers
 4. sales/service audits

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