

## Developing and maintaining effective customer relationships

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### 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 any 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 work to instructions, either alone or in conjunction with others, taking personal responsibility for your own actions and for the quality and accuracy of the work that you carry out.

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

You will understand the safety and environmental precautions required when carrying out your duties and you will bear these things 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 productive working relationships
2. deal with disagreements in an amicable and constructive way so that good relationships are maintained
3. keep others informed about work plans or activities which affect them
4. seek assistance from others in a polite and courteous way without causing undue disruption to normal work activities
5. 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. the regulations that affect how you should treat others and be treated at work (such as Equal Opportunities and Equal Pay, Race Relations and Sex Discrimination, Working Time Directive, Disabled Persons Acts, data protection)
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 that you are offering/providing
5. the importance of maintaining effective customer relationships, both within the workplace and with outside organisations and customers (such as listening attentively to questions asked of you, making sure you ask for help and advice in a polite and courteous manner, responding positively to requests for help from others)
6. formal and informal methods of communication, and how to use the most appropriate one in different situations
7. how to communicate in a clear, polite, confident way, and why this is important
8. the need for customer confidentiality
9. your organisation's standards for appearance and behaviour
10. questioning techniques, to ensure that the root of any problem is identified, and in relation to needs and feelings
11. techniques for responding to the needs and feelings of others
12. the difficulties that can occur in working relationships, and how to resolve them
13. the sorts of attitude and request that are likely to create conflict or negative responses
14. how to deal with problems that could have an adverse effect on relationships or the business
15. dealing with disagreements with others in ways which will help to resolve difficulties and maintain long term relationships
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the limits of your own authority, and when you need to seek advice, agreement or permission from others

### Scope/range related to performance criteria

1. Establish and maintain working relationships with **two** of the following:
  1. internal customers (such as colleagues, supervisors)
  2. external customers/clients
  3. contractors
  4. other companies
2. Use **three** 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. facsimiles (fax)
  7. on-line
3. Maintain effective customer relations, by carrying out **all** of the following:
  1. meeting organisational 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 that you cannot readily answer
4. Respond appropriately to customers, to include **two** of the following circumstances:
  1. complaints about service or product
  2. information about work plans or activities that affect them
  3. areas which require clarification
  4. feedback on work undertaken
  5. general questions and comments

5. 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
6. Ensure you comply with company policy at all times, particularly with 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

## Developing and maintaining effective customer relationships

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