



Level 2 Certificate in

**Property: Residential Property Letting and
Management**

Qualification Specification

Qualification Recognition Number: 600/1003/4

ABBE Qualification Code: CertRPLML211

April 2019

Why this document is being revised

This document has been revised by ABBE in April 2019. A summary of the changes made to this document is, as follows:

- New address added to 1.4

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Contents

1. ABBE

1.1 Introduction	4
1.2 Mission Statement	4
1.3 Qualification Specification	4
1.4 Enquiries	4

2. Qualification Information

2.1 Qualification Purpose	5
2.2 Who can take this qualification?	5
2.3 Qualification number	5
2.4 Qualification level	5
2.5 Total Qualification Time (TQT)	5
2.6 Progression	5
2.7 Age ranges	6
2.8 Structure of qualification	6
2.9 Barred units	7
2.10 Language	7
2.11 Grading	7
2.12 Pre-course procedures	7
2.13 Qualification Review Boards	7

3. Qualification Unit(s)

3.1 Qualification unit(s)	8
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1. ABBE

1.1 Introduction

ABBE, the Awarding Body for Building Education is a forward thinking organisation that offers a range of apprenticeships, qualifications, benefits and support.

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions.

The full range of qualifications can be found on our website: www.abbeqa.co.uk.

1.2 Mission Statement

Our Values - Quality through Standards: Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

Our Vision: Is that every learner is confident, successful and has the opportunity to achieve their full potential.

Our Mission: ABBE Educates, inspires and empowers learners

1.3 Qualification Specification

The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

ABBE
Birmingham City University
University House
15 Bartholomew Row
Birmingham
B5 5JU

Telephone: 0121 331 5174
Email: abbeenquiries@bcu.ac.uk



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2. Qualification Information

2.1 Qualification Purpose

The ABBE Level 2 Certificate in Property: Residential Property Letting and Management has been developed to enable those working in lettings negotiation, property management, marketing or junior management in a residential lettings environment to take a qualification which not only recognises their current skills and knowledge but gives them an opportunity to develop them further.

The purpose of the qualification is to confirm occupational competence. On successful completion of the qualification learners can apply for:

- Membership of the Association of Residential Letting Agents
- Associate membership of the Guild of Letting and Management
- RICS assessment of professional competence

2.2 Who could take this Qualification?

In order to take the qualification, learners must already be working in a residential lettings environment but it is suitable for those with limited experience, to prepare them for working in this sector, or for more experienced workers to recognise their existing abilities.

This qualification can be taken as preparation for employment as well as professional development for those interested in specialising in this area.

2.3 Qualification Number

ABBE Level 2 Certificate in Property: Residential Property Letting and Management: 600/1003/4

2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 2

2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also be allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 200
- Guided Learning (GL) for this qualification is: 85
- Credit Value: 20 credits

2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- enabling current residential letting agency employees to demonstrate the skills and knowledge that they have gained through their employment enabling learners to achieve a nationally recognised qualification
- providing a template for 'best practice' for new entrants to residential letting and management as a guide for their learning and development



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The Level 2 Certificate in Property: Residential Property Letting and Management forms part of a wider suite of property related qualifications including the:

- ABBE Level 2 Certificate in Property: Sale of Residential Property
- ABBE Level 3 Diploma in Property: Sale of Residential Property
- ABBE Level 3 Diploma in Property: Residential Property Lettings and Management

All of these qualifications have been structured in such a way as to allow easy transfer between them to encourage learners to continue developing.

2.7 Age ranges

Pre 16	No
16-18	Yes
18+	Yes
19+	Yes

2.8 Structure of the Qualification

To achieve this qualification learners must achieve the five mandatory units plus nine credits from the optional units.

Where a learner is following an apprenticeship programme they must also complete sufficient credits from the additional units; 4 credits from Group A and 11 credits from Group B.

Mandatory Units:			
URN	Unit Name	Credit Value	Level
M/600/2775	Reduce risks to health and safety in the workplace	3	2
T/601/2949	Understanding professional conduct in a property environment	1	2
R/601/2957	Know the legislation, guidelines, codes of practice and statutory information in residential lettings	3	2
J/601/2972	Maintain the security of individuals and property in a property environment	2	2
R/601/2988	Progress customer enquiries associated with property services	2	2
Optional Units:			
R/601/2991	Maintain displays of marketing materials for properties	2	2
F/601/3053	Organise market appraisals of properties	3	2
D/601/3108	Prepare for the marketing of properties to let	2	2
Y/601/3110	Match and promote properties to individuals	3	2
D/601/3111	Organise and progress viewings of properties	2	2
J/601/3121	Conduct accompanied viewings of properties	3	2
L/601/3122	Progress applications to rent property	3	3
Additional Units: Apprenticeships Only Group A (4 credits required)			
R/600/6351	Develop yourself in the job role	2	2
A/502/7524	Employment rights and responsibilities in the facilities management, housing and property sectors	2	2
Additional Units: Apprenticeships Only Group B (minimum of 11 credits required)			
A/601/1219	Deal with customers across a language divide	8	2



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F/601/1223	Deal with incoming telephone calls from customers	5	2
J/601/1224	Make telephone calls to customers	6	2
A/601/1222	Use questioning techniques when delivering customer service	4	2
L/601/1225	Deal with customers using bespoke software	5	2

2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

2.11 Grading

This qualification is: Pass/Fail

2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

2.13 Qualification Review Boards

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



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3. Qualification Unit(s)

Unit 1: Reduce risks to health and safety in the workplace

Unit Reference Number: M/600/2775

Level: 2

Credit: 3

Unit Summary

This unit is about reducing risks to health and safety in the workplace. It is about appreciating significant risks in the workplace and knowing how to identify and deal with them.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know about their organisation's health and safety procedures	1.1 Describe their responsibilities and legal duties for health and safety in the workplace
	1.2 Identify responsibilities and legal duties for health and safety specific to their own job role
	1.3 Name and locate the person responsible for health and safety in their area of work
	1.4 Describe where and when to get additional health and safety assistance
	1.5 Give reasons why it is important to follow manufacturer's instructions for the safe use of equipment materials and products
2. Know how to identify the hazards in the workplace	2.1 Define the term 'hazard'
	2.2 Give examples of hazards which could exist in the workplace and the safe working practices which should be followed and identify those specific to their own job role
	2.3 Give reasons why it is important to remain alert to the presence of hazards in the whole workplace
	2.4 Describe why personal presentation and behaviour is important in maintaining health and safety in the workplace
3. Know how to evaluate risks in the workplace	3.1 Define the term 'risk'
	3.2 Give reasons why they should deal with or report risks
	3.3 Describe procedures for reporting risks which they are unable to deal with



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	3.4 Describe the risks to the environment which may be present in the workplace and their own job
4. Be able to identify the hazards and risks in the workplace	4.1 Select the workplace instructions relevant to the job
	4.2 Identify aspects of the workplace which could pose a danger to themselves or others
	4.3 Give examples of working practices in the job which could pose a danger to people in the workplace
	4.4 Assess which aspects of the workplace and working practices pose the highest risk and report them to the relevant person
	4.5 Deal with hazards in accordance with instructions and legal requirements
5. Be able to reduce the risks to health and safety in the workplace	5.1 Perform duties in accordance with workplace instructions, manufacturer's instructions and legal requirements
	5.2 Use equipment materials and products safely and in accordance with instructions
	5.3 Use relevant equipment to control risks to health and safety
	5.4 Make suggestions on how to reduce risks to health and safety in the workplace to the relevant person
	5.5 Describe any differences between workplace instructions and manufacturer's instructions and report these to the relevant person
	5.6 Describe how their personal presentation and behaviour at work could cause risks to the health and safety of him/herself and others



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Unit 2: Understanding professional conduct in a property environment

Unit Reference Number: T/601/2949

Level: 2

Credit: 1

Unit Summary

This unit is about presenting a professional image when working in a property environment. It includes providing information in a way which promotes understanding.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand how to present a positive image in a property environment	1.1 Describe the standards of appearance and conduct which should be maintained in a property environment
	1.2 Explain why it is important to maintain standards of appearance and conduct in a property environment
2. Understand the importance of communicating information clearly	2.1 Explain why it is important to explain technical terms and abbreviations when providing information
	2.2 Explain why it is important to avoid jargon when providing information
	2.3 Explain the importance of checking that the recipient has understood the information given



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Unit 3: Know the legislation, guidelines, codes of practice and statutory information in residential lettings

Unit Reference Number: R/601/2957

Level: 2

Credit: 3

Unit Summary

This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a lettings environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand legislation, guidelines and codes of practice in residential lettings	1.1 List the legislation, guidelines and codes of practice relevant to the: <ul style="list-style-type: none"> • security of individuals • security of property • providing information to tenants and landlords • production of marketing materials for residential properties to let • erection of boards • undertaking market appraisals • advising landlords on the presentation of properties • obtaining instructions and agreeing marketing plans • preparing properties for marketing • contacting prospective tenants • describing properties • organising viewings of properties • progressing viewings of properties • conducting viewings of properties to let • progressing applications to rent properties • negotiating tenancies • preparing inventories • handing over residential property to tenants • tenant deposits • tenancy agreements • rent reviews • ending tenancies • check-out procedures



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	<p>1.2 Explain how legislation, guidelines and codes of practice impact on:</p> <ul style="list-style-type: none"> • security of individuals • security of property • providing information to tenants and landlords • the display of marketing materials for residential properties to let • the erection of boards • undertaking market appraisals • advising landlords on the presentation of properties • obtaining instructions • agreeing marketing plans • preparing properties for marketing • contacting prospective tenants • describing properties • organising viewings of properties • progressing viewings of properties • conducting viewings of properties to let • negotiating tenancies • preparing inventories • handing over residential property to tenants • tenant deposits • tenancy agreements • rent reviews • ending tenancies • check-out procedures
<p>2. Understand statutory information in residential lettings</p>	<p>2.1 List the typical range of statutory documents required for properties to let</p> <p>2.2 Explain the purpose of statutory information for property to let</p> <p>2.3 Explain why it is important to comply with statutory information requirements for property to let</p> <p>2.4 Explain why it is important to ensure that all statutory information for property to let is in place in line with legal requirements</p>
<p>3. Understand tenancy agreements and terms of appointment</p>	<p>3.1 List types of tenancy agreements</p> <p>3.2 Describe the terms associated with different types of tenancy agreements</p> <p>3.3 List the types of special terms or conditions which may be requested for tenancy agreements</p> <p>3.4 List the types of conditions which can legally be included in tenancy agreements</p> <p>3.5 Explain the difference between:</p> <ul style="list-style-type: none"> • landlords special terms • restrictive covenants <p>3.6 Describe the general terms of appointment for own organisation</p> <p>3.7 Explain how the general terms of appointment can vary</p>



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Unit 4: Maintain the security of individuals and property in a property environment

Unit Reference Number: J/601/2972

Level: 2

Credit: 2

Unit Summary

This unit is about contributing to the maintenance of the security of yourself, colleagues, customers and property, covering both personal property and properties available through the organisation. It includes identifying possible risks to security and applying appropriate security procedures at all times both in the office and when offsite at properties.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to maintain the security of self and others	1.1 State the main types of risks within the working environment and/or when visiting properties and development sites that may affect: <ul style="list-style-type: none">• self• colleagues• others
	1.2 Describe the organisational procedures for minimising the risks to individuals
	1.3 State the importance of monitoring the whereabouts of colleagues
	1.4 Describe what constitutes: <ul style="list-style-type: none">• unexpected circumstances• absences• departures from agreed schedules
	1.5 Describe the procedures which should be followed in the event of an emergency
2. Know how to maintain the security of information about individuals	2.1 Describe the organisational procedures for the security of information
	2.2 Give examples of types of information which may be sensitive
	2.3 State who is entitled to receive different types of information about individuals
	2.4 Describe the organisational procedures for disposing of information relating to individuals and property that is no longer required
3. Know how to maintain the security of property	3.1 State the main types of risks to: <ul style="list-style-type: none">• personal property• residential properties
	3.2 Describe the actions and organisational procedures appropriate to minimising the risks to: <ul style="list-style-type: none">• personal property• residential properties
	3.3 Describe the organisational procedures for the security and logging of keys and access codes for properties



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	3.4 Describe the organisational procedures and security arrangements for the handling of cash and cheque payments
4. Be able to maintain the security of self and others	4.1 Identify risks: <ul style="list-style-type: none"> • within the working environment • when visiting properties and development sites which may affect: <ul style="list-style-type: none"> • self • colleagues • others
	4.2 Apply relevant security procedures and guidelines for addressing risks to: <ul style="list-style-type: none"> • self • colleagues • others
	4.3 Provide clear and accurate information to relevant colleagues regarding own travelling arrangements and schedules when visiting properties and sites
	4.4 Follow the organisational procedures for monitoring the whereabouts of colleagues
	4.5 Respond appropriately to any unexpected circumstances, absences and departures from agreed schedules
	4.6 Follow organisational procedures in the event of an emergency
5. Be able to maintain the security of property, personal belongings and information	5.1 Identify the security risks affecting: <ul style="list-style-type: none"> • properties • personal belongings
	5.2 Apply the relevant security procedures and guidelines for protecting: <ul style="list-style-type: none"> • properties • personal belongings • valuables • money • keys and access codes
	5.3 Follow organisational procedures for reporting any security equipment which is not functioning properly
	5.4 Follow organisational procedures for the security of information including the disposal of information which is no longer required



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Unit 5: Progress customer enquiries associated with property services

Unit Reference Number: R/601/2988

Level: 2

Credit: 2

Unit Summary

This unit is about progressing enquiries about services associated with residential property. Enquiries can be general requests for information or specific requests regarding particular services and/or properties available via the organisation. It includes providing relevant information towards addressing enquiries and checking to confirm that the information fulfils requirements.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to obtain instructions	1.1 Describe the organisational procedures for: <ul style="list-style-type: none"> • obtaining instructions • agreeing marketing activities • progressing marketing activities
	1.2 State the importance of obtaining all relevant information prior to seeking to obtain an instruction for a particular property
	1.3 Describe how to conduct and structure a sales presentation when seeking to obtain instructions
	1.4 Describe the difference between the features and benefits of the organisations services
	1.5 List typical buying signals that customers might provide: <ul style="list-style-type: none"> • verbal • non-verbal
2. Know how to agree planned marketing activities	2.1 State the advantages and disadvantages of using the following types of marketing activities: <ul style="list-style-type: none"> • newspaper advertising • web-based media • mail-shots • boards
	2.2 List the main types of buyers/tenants of residential properties
	2.3 Identify factors that influence prospective buyers/tenants decisions
	2.4 Identify changes occurring in the local property market that will impact on the selection of marketing activities
	2.5 List typical questions asked about marketing properties
	2.6 State how typical questions about marketing properties should be addressed
	2.7 Describe how conflicts of interest: <ul style="list-style-type: none"> • can arise when marketing properties • should be addressed
3. Be able to obtain instructions	3.1 Review all information relevant to: <ul style="list-style-type: none"> • the property • the customer • reasons for seeking to sell/let the property
	3.2 Discuss with the customer:



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	<ul style="list-style-type: none"> • the organisation's relevant services • the local property market • methods for selling/letting the property • marketing activities • the associated costs <p>relating these clearly to the customer's circumstances and the property</p>
	3.3 Identify any features of the organisations services which do not meet the customer's requirements and address these
	3.4 Identify buying signals given by the customer and act upon them: <ul style="list-style-type: none"> • verbal • non-verbal
	3.5 Prioritise any concerns the customer has about making the instruction
	3.6 Address and overcome where possible customer's concerns
	3.7 Agree with the customer: <ul style="list-style-type: none"> • the most appropriate method for the sale/let • terms of the instruction • costs to the customer
	3.8 comply with all relevant legislation, guidelines and codes of practice relating to obtaining instructions
4. Be able to agree marketing plans	4.1 Confirm all relevant information about the property including the main selling features
	4.2 Review the outcomes of marketing activities used for similar properties
	4.3 Discuss with the customer marketing activities which are likely to be the most effective
	4.4 Agree with the customer: <ul style="list-style-type: none"> • resources available for marketing the property • marketing activities to be used • timing and sequence of marketing activities
	4.5 Confirm the customer's acceptance of the agreed marketing activities
	4.6 Maintain records of the agreed marketing activities in line with organisational procedures
	4.7 Ensure that marketing activities are progressed in line with organisational procedures



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Unit 6: Maintain displays of marketing materials for properties

Unit Reference Number: R/601/2991

Level: 2

Credit: 2

Unit Summary

This unit is about developing and maintaining marketing materials designed to promote properties. Displays can include window displays, wall mounted displays, websites and boards. It includes ensuring that materials are up-to-date and taking the relevant actions to ensure that materials are maintained and effective.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand organisational procedures for progressing applications to rent property	1.1 List the health and safety issues associated with different types of displays
	1.2 Describe how health and safety issues associated with displays should be addressed
	1.3 Describe organisational procedures for updating and removing boards from properties
	1.4 State the limits of own responsibility and authority for the development of displays of marketing materials
	1.5 State the organisational procedures for reporting issues that are outside own responsibility and authority when developing of displays of marketing materials
2. Know how to use displays, web-based media and boards to promote properties	2.1 State the importance of displaying marketing materials effectively
	2.2 State the advantages and disadvantages of using different types of marketing displays including: <ul style="list-style-type: none"> • wall mounted displays • window displays • web-based media • boards
	2.3 State the importance of monitoring stocks of marketing materials and addressing any shortages
	2.4 List the websites and press advertising that should be used in line with organisational procedures
	2.5 List the factors which should be considered when deciding how to display marketing materials to their best effect
3. Know how to maintain marketing materials for properties	3.1 State the importance of ensuring that: <ul style="list-style-type: none"> • displays are complete and maintained • new and updated materials are included promptly • outdated materials are amended • damaged materials are discarded
	3.2 State the importance of monitoring stocks of marketing materials and addressing any shortages
	3.3 State the importance of monitoring web-based marketing materials



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	3.4 Describe the procedure for amending web-based marketing materials following organisational procedures
	3.5 List factors which make marketing materials out-of-date
4. Be able to use marketing materials and boards to promote properties	4.1 Use marketing materials to provide a presentation of available properties which meets organisational requirements
	4.2 Ensure that boards are displayed at properties where applicable
5. Be able to maintain marketing materials for properties	5.1 Monitor displays and websites to ensure that marketing materials are accurate and up-to-date
	5.2 Ensure that new and updated marketing materials are included in: <ul style="list-style-type: none"> • displays • press • web-based media
	5.3 Ensure that properties which no longer need to be marketed are removed from: <ul style="list-style-type: none"> • displays • press • web-based media
	5.4 Monitor stocks of marketing materials and address any shortages
	5.5 Ensure that boards are updated to reflect the current status of properties
	5.6 Ensure that boards are removed from properties when they are no longer required in line with legal and organisational procedures
	5.7 Make reasoned recommendations to the relevant person about how marketing materials could be improved to enhance interest in properties



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Unit 7: Organise market appraisals of properties

Unit Reference Number: F/601/3053

Level: 2

Credit: 3

Unit Summary

This unit is about agreeing with customers to undertake market appraisals of their property and making the necessary arrangements. It includes liaising with customers to explain the purpose of the appraisals and with any relevant colleagues involved in progressing the appraisals.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the procedures for negotiating tenancies	1.1 Describe the organisational procedures for drawing up tenancy agreements
	1.2 List the documents which should be signed and dated by all parties including where relevant any guarantor
	1.3 Explain the organisational procedures for dealing with inventories
	1.4 List methods of payment which are acceptable to own organisation
	1.5 Explain the organisational procedures for registering tenant deposits where applicable
2. Be able to negotiate tenancies	2.1 Negotiate and agree rent subject to the approval of the landlord
	2.2 Provisionally agree with the tenant: <ul style="list-style-type: none">• date for moving in• duration of the tenancy
	2.3 Provisionally agree any special terms which may need to be included in the tenancy agreement
	2.4 Ensure the landlord is kept fully informed of negotiations and agrees with provisional terms for the tenancy agreement
	2.5 Agree the type and terms of the tenancy with all relevant parties
	2.6 Ensure prospective tenants are aware of their rights and responsibilities in respect of the tenancy agreement
	2.7 Ensure tenants are aware of: <ul style="list-style-type: none">• initial amounts payable on signing the agreement• forms of payment accepted by the organisation
	2.8 Draw up tenancy agreements in line with organisational procedures



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Unit 8: Prepare for the marketing of properties to let

Unit Reference Number: D/601/3108

Level: 2

Credit: 2

Unit Summary

This unit is about preparing properties for marketing within a lettings environment. It includes the administration involved in gathering information and producing documents in line with the marketing activities planned for a property. It includes liaising with the landlord and those involved in producing the required documents to ensure that the finished products are correct and available on time. It is important to follow your organisation's procedures.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to prepare for the marketing of properties to let	1.1 Describe the organisational procedures for preparing and producing documents for residential properties to let
	1.2 State the typical costs and timescales for the production of different types of documents for residential properties to let
	1.3 State the importance of planning marketing activities for individual residential properties
	1.4 Describe why it is important to review all relevant information before preparing documents
	1.5 List the main types of tenants of residential property
	1.6 State the information which is of importance to different types of tenants
	1.7 State the importance of gaining the approval of the landlord to produce documentation about a property
2. Know how to arrange for the production of final documentation for residential property to let	2.1 Explain why it is important to ensure that all people involved in the production of documents are fully briefed
	2.2 Give examples of problems that can occur when preparing final documentation for marketing properties to let
	2.3 Describe how to overcome problems which occur when preparing final documentation for marketing properties to let
	2.4 State who final marketing materials should be made available to
3. Be able to prepare for the marketing of properties to let	3.1 Review all available information regarding the let relevant to the agreed marketing activities



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	3.2 Identify: <ul style="list-style-type: none"> • marketing activities proposed for the property • associated timescales
	3.3 Identify the information to be conveyed to all relevant parties, including details of the property and its main features
	3.4 Prepare marketing materials in line with planned marketing activities and organisational procedures
	3.5 Check marketing materials are accurate and contain all relevant information in line with organisational procedures
	3.6 Present marketing materials to the landlord in line with organisational procedures
	3.7 Ensure that the landlord is advised of his/her responsibility for providing information regarding any subsequent changes to the property
	3.8 Check that documentation complies with all relevant legislation, guidelines and codes of practice relevant to preparing properties for marketing



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Unit 9: Match and promote properties to individuals

Unit Reference Number: Y/601/3110

Level: 2

Credit: 3

Unit Summary

This unit is about reviewing the properties available and matching these to the needs of prospective tenants or buyers known to your organisation. It also addresses contacting the prospective tenants or buyers, providing them with the details of relevant properties towards generating their interest in those properties available.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to match properties to individuals	1.1 List the main types of tenants/buyers of residential property
	1.2 Identify factors which influence individual's decisions about properties
	1.3 Explain how to access information about properties available through the organisation to match to individuals
	1.4 State what information is required from individuals to be able to match them to available properties
	1.5 Describe the organisational procedures for recording information regarding contacts made and the outcomes
2. Know how to promote properties to individuals	2.1 Describe the organisational procedures for contacting individuals about properties
	2.2 Outline what information can be provided about properties
	2.3 State what actions should be taken when interest is expressed in a property
3. Be able to match properties to individuals	3.1 Identify properties which are available through the organisation
	3.2 Assess the types of individuals who are likely to have an interest in the properties
	3.3 Identify the requirements of individuals
	3.4 Match identified requirements with relevant features of properties
	3.5 Provide details of properties to interested parties
	3.6 Ensure that colleagues are informed about information given to individuals



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4. Be able to promote properties to individuals	4.1 Contact individuals using appropriate methods in line with organisational procedures
	4.2 Explain to individuals: <ul style="list-style-type: none"> • the relevant selling features of particular properties • why the selling features match their requirements
	4.3 Establish whether individuals are interested in particular properties
	4.4 Agree relevant actions towards assisting individuals to review further properties of interest
	4.5 Maintain records of contacts made in line with organisational procedures
	4.6 Ensure that relevant colleagues are informed of possible interest in particular properties
	4.7 Comply with all relevant legislation, guidelines and codes of practice when promoting properties



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Unit 10: Organise and progress viewings of properties

Unit Reference Number: D/601/3111

Level: 2

Credit: 2

Unit Summary

This unit is about organising the viewings of residential properties. It includes making appropriate arrangements for viewings and seeking and responding to feedback as a result of viewings. This unit is for use in either a sales or a lettings environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to develop relationships with prospective buyers/tenants	1.1 List the main types of buyers/tenants of residential property
	1.2 Identify factors that influence individual's decisions about properties
	1.3 Describe the organisational procedures for contacting individuals
	1.4 Outline what information can be provided to interested parties about properties
	1.5 Outline the benefits to interested parties of viewing properties
	1.6 List the range of viewing arrangements available
	1.7 Describe how to arrange viewings
	1.8 Describe types of visiting conditions and restrictions that may apply to different properties
2. Know how to follow up viewings	2.1 List factors that can affect the saleability of properties
	2.2 Describe organisational procedures for obtaining feedback following a viewing
	2.3 State what actions should be taken when interest is expressed in a property
	2.4 Maintain records of viewings in line with organisational procedures
3. Be able to organise and progress viewings	3.1 Promote the benefits of viewing properties
	3.2 Confirm the types of properties which are of interest to prospective buyers/tenants



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	<p>3.3 Agree with the prospective buyer/tenant the:</p> <ul style="list-style-type: none"> • properties to be viewed • type of viewings to be undertaken
	3.4 Identify viewing conditions and restrictions relating to properties to be viewed
	3.5 Ensure that appropriate steps are taken to protect the health, safety and security of those involved in the viewing
	3.6 Ensure that all relevant parties are notified of the arrangements for the viewing
4. Be able to review viewings of properties	4.1 Obtain feedback from prospective buyers/tenants following viewings
	4.2 Record feedback from viewings in line with organisational procedures
	4.3 Take action to address any problems with viewings
	4.4 Agree relevant actions towards assisting individuals to progress interest in particular properties
	4.5 Maintain records of viewings in line with organisational procedures
	4.6 Ensure that relevant colleagues are informed of viewings and their outcomes
	4.7 Comply with all relevant legislation, guidelines and codes of practice relating to viewings of properties



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Unit 11: Conduct accompanied viewings of properties

Unit Reference Number: J/601/3121

Level: 2

Credit: 3

Unit Summary

This unit is about accompanying prospective buyers/tenants to view properties. It includes providing them with relevant information and knowledge regarding the property, and answering their questions. This unit is suitable for use in a sales or lettings environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to prepare for viewings	1.1 List the key features of the local property area which are of interest to prospective buyers/tenants
	1.2 List the types of marketing materials regarding the organisation's properties and how to access them
	1.3 State how to obtain information about any fixtures and fittings which are included in a property
	1.4 Describe how the following are identified: <ul style="list-style-type: none">• typical property values in the area• types of different property that are being sold/let
2. Know how to liaise with prospective buyers/tenants	2.1 List the main types of buyers/tenants of residential properties
	2.2 Identify factors that influence individual's decisions
	2.3 Outline what information can be provided to individuals about properties
	2.4 Describe types of visiting conditions and restrictions that may apply to different properties
	2.5 Give examples of typical questions asked about properties
	2.6 State how questions about properties should be addressed
	2.7 State what actions should be taken when interest is expressed in a property
3. Be able to prepare to conduct accompanied viewings	3.1 Confirm the property is still available
	3.2 Confirm arrangements for the viewing with all relevant parties
	3.3 Obtain current marketing materials for the property to be viewed



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	3.4 Identify all relevant: <ul style="list-style-type: none"> • specifications for the property • details of fixture and fittings available
	3.5 Identify the types and locations of local services and amenities
	3.6 Ensure that individuals have accurate and clear directions for the property to be viewed
	3.7 Check that access to the property is available at the time of the proposed viewing
	3.8 Take action to address any problems with the viewing
4. Be able to conduct viewings of properties	4.1 Attend appointments at the agreed time and place
	4.2 Confirm with the prospective buyer/tenant: <ul style="list-style-type: none"> • own identity • identity of the prospective buyer/tenant • objectives for the viewing • proposed itinerary • their expectations
	4.3 Promote the key selling points of the property
	4.4 Provide accurate information about local services and amenities
	4.5 Check that individuals have understood information and answer questions asked if any
	4.6 Record significant comments regarding properties of interest in line with organisational procedures
	4.7 Identify properties of interest and agree actions to progress interest
	4.8 Carry out viewings in accordance with any conditions and restrictions
	4.9 Take steps to maintain health, safety and security for all parties
	4.10 Ensure that the property is secure on departure
	4.11 Maintain clear and accurate records of viewings and their outcomes
	4.12 Ensure that relevant colleagues are kept informed of viewings and their outcomes
	4.13 Comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied viewings



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Unit 12: Progress applications to rent property

Unit Reference Number: L/601/3122

Level: 3

Credit: 3

Unit Summary

This unit is about obtaining information regarding prospective tenants relevant to assessing their suitability towards the property.

It includes arranging checks and undertaking referencing. During this process it is important to take into account legislation e.g. the Data Protection Act.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand organisational procedures for progressing applications to rent property	1.1 State what information can be provided to prospective tenants
	1.2 State who should be consulted internally about the suitability of prospective tenants
	1.3 Describe the organisational procedures for recording information about qualifying tenants
	1.4 State the limits of own responsibility and authority for progressing applications to rent property
	1.5 State the organisational procedures for reporting issues that are outside own responsibility and authority when progressing applications to rent property
2. Know how to qualify prospective tenants	2.1 Explain the importance of gaining the consent of the prospective tenant to seek further information about them
	2.2 Describe factors that may affect prospective tenants: <ul style="list-style-type: none">• ability to rent property• acceptability to landlords
	2.3 State what information is needed to determine tenants' circumstances
	2.4 State the importance of explaining to the tenant why information about them is required
	2.5 State what information must be obtained from other organisations



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	2.6 State the importance of maintaining confidentiality when obtaining information from other organisations
	2.7 List issues that can arise when seeking information
	2.8 Describe how to address any issues that can arise when seeking information
3. Be able to obtain information to qualify prospective tenants	3.1 Confirm information about prospective tenants to establish their circumstances relevant to renting a property
	3.2 Obtain permission from the prospective tenant to seek further information from other organisations where relevant
	3.3 Follow organisational procedures to obtain information regarding prospective tenants from other organisations
	3.4 Gather relevant information from prospective tenants, including preferred timescales for moving in
	3.5 Explain to prospective tenants any administration fees charged by the organisation including: <ul style="list-style-type: none"> • purpose of the fees • times when fees are charged • potential refunds
4. Be able to progress applications to rent property	4.1 Identify any problems with obtaining the required information
	4.2 Follow organisational procedures to undertake referencing
	4.3 Report the results of the referencing process to relevant people within the organisation
	4.4 Check that prospective tenants have understood the information and encourage questions
	4.5 Maintain up-to-date records in line with organisational procedures
	4.6 Comply with all relevant legislation, guidelines and codes of practice when progressing applications to rent property



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Unit 13: Develop yourself in the job role

Unit Reference Number: R/600/6351

Level: 2

Credit: 2

Unit Summary

This unit is about developing yourself in your job by identifying areas for further development and setting yourself targets for achieving this.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to develop him/herself in the job	1.1 Identify activities that could help with self-development
	1.2 Describe how to set targets for personal development
	1.3 State the importance of setting achievable personal development targets
	1.4 Identify the types of support available to achieve targets
	1.5 Describe the procedures for accessing support
	1.6 State the importance of reviewing and updating progress against targets
	1.7 Describe the procedures for reviewing and updating progress
	1.8 List the benefits of discussing progress with others
2. Be able to develop him/herself in the job	2.1 Identify and agree areas where they could develop further
	2.2 Agree achievable targets for personal development
	2.3 Agree the time and support required to achieve targets
	2.4 Demonstrate new skills in the workplace
	2.5 Request and use feedback on own performance from others



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Unit 14: Employment rights and responsibilities in the facilities management, housing and property sectors

Unit Reference Number: A/502/7524

Level: 2

Credit: 2

Unit Summary

Successful assessment of the unit proves that the candidate has achieved the national occupational standard to understand employment rights and responsibilities.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know employer and employee rights, responsibilities and own organisational procedures	1.1 State employer and employee rights and responsibilities under employment law, including the Equality Act, Health & Safety and other relevant legislation
	1.2 State importance of having employment rights and responsibilities
	1.3 Describe organisational procedures for health & safety, including documentation
	1.4 Describe organisational procedures for equality & diversity, including documentation
	1.5 Identify sources of information and advice on employment rights and responsibilities
2. Know factors that affect own organisation and occupation	2.1 Describe the role played by own occupation within organisation and industry
	2.2 Describe career pathways available to them
	2.3 State types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry
	2.4 Identify sources of information and advice on own industry, occupation, training and career
	2.5 Describe principles, policies and codes of practice used by own organisation and industry
	2.6 Describe issues of public concern that affect own organisation and industry



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Unit 15: Deal with customers across a language divide

Unit Reference Number: A/601/1219

Level: 2

Credit: 8

Unit Summary

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Prepare to deal with customers with a different first language	1.1 Identify the language or languages other than their own that they are most likely to come across when dealing with customers
	1.2 Learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter
	1.3 Identify a source of assistance with a language they expect to encounter when delivering customer service
	1.4 Agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language
	1.5 Log useful words and phrases to support their dealings with a customer with a different first language
	1.6 Learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently
2. Deal with customers who speak a different first language from their own	2.1 Identify their customer's first language and indicate to the customer that they are aware of this
	2.2 Establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs
	2.3 Speak clearly and slowly if using a language which is not the first language for either them or their customer



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	2.4 Maintain a consistent tone and volume when dealing with somebody across a language divide
	2.5 Listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words
	2.6 Check their understanding of specific words with their customer using questions for clarification
	2.7 Seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers
	2.8 Reword a question or explanation if their customer clearly does not understand their original wording
	2.9 Use a few words of their customer's first language to create a rapport
3. Know how to deal with customers across a language divide	3.1 List the languages that they are most likely to encounter among groups of their customers
	3.2 State how to greet, thank and say farewell to customers in their first languages
	3.3 Explain the importance of dealing with customers in their first language if possible
	3.4 Describe how to explain to a customer that they cannot hold an extended conversation in their first language
	3.5 Explain the importance of tone, pace and volume when dealing with customers across a language divide
	3.6 Identify possible sources of assistance to use when a language barrier demands additional language skills



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Unit 16: Deal with incoming telephone calls from customers

Unit Reference Number: F/601/1223

Level: 2

Credit: 5

Unit Summary

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Use communication systems effectively	1.1 Operate telecommunication equipment efficiently and effectively
	1.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer
	1.3 Listen carefully when collecting information from their customer
	1.4 Select the information they need to record and store following their organisation's guidelines
	1.5 Update their customer records during or after the call to reflect the key points of the conversation
2. Establish rapport with customers who are calling	2.1 Greet their customer following their organisation's guidelines
	2.2 Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call
	2.3 Confirm the identity of their customer following organisational guidelines
	2.4 Use effective and assertive questions to clarify their customer's requests
3. Deal effectively with customer questions and requests	3.1 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each
	3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer
	3.3 Give clear and concise information to customers in response to questions or requests



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	3.4 Use questions and answers to control the length of the conversation
	3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time
	3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague
	3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result
	3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with
	3.9 Complete any follow up actions agreed during the call
	3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests
	3.11 Ensure that promises to call back are kept
4. Know how to deal with incoming telephone calls from customers	4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment
	4.2 Explain how to operate the organisation's telecommunication equipment
	4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone
	4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone
	4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
	4.6 Identify what information is important to note during or after telephone conversations with customers
	4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
	4.8 Explain the importance of keeping their customer informed if they are on hold during a call
	4.9 Explain the importance of not talking across an open line
	4.10 List details that should be included if taking a message for a colleague
	4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers
	4.12 Describe their organisation's guidelines for handling abusive calls



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Unit 17: Make telephone calls to customers

Unit Reference Number: J/601/1224

Level: 2

Credit: 6

Unit Summary

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Plan their calls effectively	1.1 Use all appropriate customer information to plan their call
	1.2 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer
	1.3 Identify the objective of their call and the way in which they expect the call to end
	1.4 Plan the opening part of their conversation with their customer and anticipate possible responses
2. Use communication systems effectively	2.1 Operate telecommunication equipment efficiently and effectively
	2.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer
	2.3 Listen carefully when collecting information from their customer
	2.4 Select the information they need to record and store following their organisation's guidelines
	2.5 Update their customer records during or after the call to reflect the key points of the conversation
3. Make focussed calls to their customer	3.1 Open the conversation positively and establish a rapport with their customer
	3.2 Confirm the identity of their customer following organisational guidelines
	3.3 Ensure that their customer is aware of the purpose of their call as early as possible



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	3.4 Respond positively to queries and objections from their customer
	3.5 Summarise the outcome of the call and any actions that they or their customer will take as a result
	3.6 Complete any follow up actions agreed during the call



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Unit 18: Use questioning techniques when delivering customer service

Unit Reference Number: A/601/1222

Level: 2

Credit: 4

Unit Summary

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Establish rapport and identify customer concerns	1.1 Greet their customer sincerely and invite a full and open response
	1.2 Use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry
	1.3 Invite more detailed explanation from their customer
	1.4 Listen closely to their customer's responses to strengthen their understanding of customer concerns
	1.5 Use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation
	1.6 Identify and note their customer's feelings and mood in relation to the information they are seeking
2. Seek detailed information from customers using questioning techniques	2.1 Follow a planned trail of questions to explore in detail customer concerns they have already identified
	2.2 Hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified
	2.3 Explain to their customer why they need the information they are asking for
	2.4 Use probing and searching questions that draw on comments or words used by their customer
	2.5 Thank their customer for the information in a way that encourages further open responses
	2.6 Use pre-planned routing and trigger questions that lead their customer to respond in new areas



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	2.7 Follow organisational procedures to record customer responses to inform future actions
3. Understand how to use questioning techniques when delivering customer service	3.1 Explain why establishing rapport makes it easier to draw information from customers
	3.2 Describe ways to greet customers that immediately build rapport
	3.3 Explain reasons for using planned question patterns to draw out particular information
	3.4 Explain reasons for using spontaneous conversation to draw out particular information
	3.5 Explain the importance of active listening when seeking detailed information from customers
	3.6 Identify the differences between and uses of closed and open questions
	3.7 Describe the importance of explaining to customers why information is needed
	3.8 Explain why particular trigger questions are effective in gaining specific information



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Unit 19: Deal with customers using bespoke software

Unit Reference Number: L/601/1225

Level: 2

Credit: 5

Unit Summary

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Prepare to deliver customer service using bespoke software	1.1 Sign on and open access to appropriate functions in the IT system
	1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas
	1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver
	1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
	1.5 Prepare their work area to deliver customer service using bespoke software
2. Deliver customer service using bespoke software	2.1 Identify their customer or the services or products they wish to access
	2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs
	2.3 Use search or other specialist functions within the software to respond to customer requests
	2.4 Enter new records using the bespoke software system
	2.5 Amend customer service records in the bespoke software system
	2.6 Communicate with their customers in terms they can understand relating to the software system



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	2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
	2.8 Interpret error messages and act on them to support their customer service
	2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction
3. Understand how to deal with customers using bespoke software	3.1 Describe access and sign-on routines for the bespoke software system
	3.2 Describe the architecture and geography of the bespoke software system
	3.3 Identify different screen or menu routes that can be followed to meet customer requirements
	3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines
	3.5 Explain the importance of preparing a work area before delivering customer service
	3.6 Explain search or other enquiry facilities within the bespoke software system
	3.7 State the importance of avoiding jargon and system terminology when communicating with customers
	3.8 Describe ways to respond to error messages when using a bespoke software system
	3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system

NB: The units above may also appear in the Level 2 Certificate in Property: Sale of Residential Property



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