

**Introduction**

This learning content has been developed so that you are able to collect and understand evidence that demonstrates your knowledge and skills in relation to identifying the needs of customers.

Further learning materials and support is available through your studying membership of the Institute of Enterprise and Entrepreneurs.

If you haven’t yet received your login please speak to your Assessor who will be happy to sort this out for you.

This unit contains two learning outcomes and will support you to be able to:

* Identify customer needs
* Understand and demonstrate appropriate customer care

In this Unit, you will be required to complete a practical observation of you demonstrating customer care skills. Please arrange this with your assessor at the earliest convenience.

The evidence within this workbook will be assessed by,

**Assessor Name:**

and will be quality assured by,

**Internal Quality Assurer Name:**

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**Introduction**

**You, your business and your customers**

Task: What do you think a customer is? Come up with your own definition of the term customer.

Customers are people that you interact with in your life. Usually a customer would be someone that buys something from you or hires a service. But customers can really mean anyone. The people you work with, people in other departments at work, your neighbours. Anyone who can provide you with help, interaction or a service is a customer.

In terms of the traditional meaning of customers, they are one of the most important aspects of a business. Without customers, most businesses would not be sustainable and may have to close down. Customers provide a source of income. We all hope that those customers will provide a regular source of income, but a customer will only come back if they enjoy the experience. So to maintain your stream of customers, it is important that you know what your customers need, what they want and how to look after your customers. This will change depending on your business, on what you provide, and how you provide your goods or services.

Within this unit we will help you to identify your customers’ needs and help you discover ways to implement customer care in an effective and efficient manner.

**Who are your customers?**

The first, and maybe most important, step in understanding your customers’ needs and wants, is knowing who they are. And this doesn’t mean knowing their names or where they're going on holiday. I mean understanding them as people. What brought them to you instead of someone else? This will lead to asking what their needs and wants are. Are they looking for a service?

Are they buying a product from you? Maybe your customer is reading your blog and isn't actually buying anything from you at all. Maybe your customer is coming to you for advice and there is no financial transaction. You will need to understand what you can offer your customers, and what these customers will expect from you. This is crucial to the survival of your business and relationship with this individual.

**Reflection:** Think about your business/day to day life. What does your business offer its customers? Do you provide a service, product or another form of transaction? What do you offer people in your life? Make a note of this, and list what you can provide your customers. This will come in handy when thinking about customer care.

To help with understanding your customers, you may want to ask yourself the following questions:

* Who is the customer?
* What does the customer want to buy?
* When does the customer want to buy?
* Where does the customer buy?
* How does the customer pay?
* What price is the customer willing to pay? (Market Research.com, 2018)

The answers to these questions will allow you to tailor your service to each individual customer. There are many types of businesses that have different types of customers. So part of identifying your customer would also be identifying your business and how your customer relates to your business.

You can ask yourself versions of the previous questions to help you understand your own business or day to day life interactions.

* What type of business do you run?
* Do people often come to you for advice?
* What does your business sell / provide?
* Do you provide anything to the people in your life, in terms of services?
* When can your business sell / provide this item or service?
* Where does your business operate?
* How does your business operate?
* What price does your business charge?

You will also need to think about what your customer wants, and what they need from the experience.

Customers who are buying a product from you have a simple need, such as the product they have purchased. They will have ‘wants’ attached to this need, which could make them return as a customer in the future. They may even recommend your business to their friends and family. The wants could be good customer service, speedy service, promotions or discounts. They don’t need a discount or good customer service to buy the product, but they may become a returning customer with a little incentive. This is not to say that you should offer deals to all of your customers every time they shop with you. But when thinking of strategies to approach new customers or loyal returning customers, there are things you can do to bring in business. A speedy service may not be appropriate in some situations, such as medical situations or when trying to understand the root of a problem. Deals and discounts may not be appropriate if you are offering wholesale prices already. But good customer service should almost always be a main focus, (unless you worked in this [restaurant](https://www.youtube.com/watch?v=KJpwF7Nc3dk)).



Your Assessor will support you to plan how best to demonstrate your knowledge and skills which may be through the completion of the activities within this workbook or may include additional tasks best suited to you.

If any additional tasks are to be completed these will be listed in the table below with target dates for which you should try your best to complete each task listed.

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| **Task** | **Target Date** | **Re-planned Target Date** |
| Completion of the activities included within this workbook |  |  |
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By signing below, you agree to completing the work as detailed above and working with your Assessor to achieve this by the deadlines indicated.

**Learner Name:**

**Signature:**

**Date:**

**Assessor Name:**

**Signature:**

**Date:**



**Activity One**

To understand what a customer needs it’s important to put yourself in their shoes. We’ve all been customers of some type in our lives and so have an understanding of the needs we have as a customer.

Using the box below, identify the types of needs customers have using your own experiences.

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**Activity Two**

Customer needs change dependent on the type of business and service they are looking to engage with. Within a setting of your own choice list three examples of needs you believe a customer would have.

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| **Type of business/environment** |  |
| **Need One:** |  |
| **Need Two:** |  |
| **Need Three:** |  |

**Activity Three**

**What is customer care? List examples and how it affects the customer**

Customer care will look different for each business and each type of customer. Now you have identified your business model, and your customer, you will be able to apply the correct customer care.

But what is customer care?

Before reading a definition, what do you think customer care is?

**Customer care is:**

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Forbes Magazine says that customer care “is how well customers are taken care of while they interact with the brand” (Forbes, 2018).

This goes past the point of simply making a sale. Customer care is listening to the needs of your customer and giving them the correct solution. By combining customer service and customer care, customers will return and feel satisfied with their experience.

Can you think of three examples of what would count as customer care within the definition you have provided?

**Example One:**

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**Example Two:**

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**Example Three:**

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**Activity Four**

Providing your customers with good customer care is really important for your business. Let's take a look at some examples below and highlight where you think the individuals demonstrated customer service skills and that extra customer care:

**All for fun, and fun for all party planners.**

Amanda runs her own party planning business. The company has been operating for around three years and Amanda is seeing a rise in her customer base. Along with the new customers, Amanda also has the same customers booked in every year for their birthdays.

Today, Amanda has a meeting with a client. The client she will be meeting is a new customer. When the client arrives, Amanda introduces herself. She begins a light conversation with her new customer and tries to analyse how informal she can be without crossing the boundary into unprofessional. After some general chat, Amanda asks her customer what the event will be, if there is a theme and if there is a budget. The customer gives Amanda answers to her questions and provides her with added details such as “he loves cacti” and “he hasn’t ever been to a concert before”.

Amanda picks up on these things and notes them down. She also notes down the name of the person, who the party is for, and she lists key words about the personality of the person. When the meeting ends, Amanda gives the customer her mobile number and sets herself deadlines which she shares with the customer.

**Tiny squirrel Country Pub**

Paul runs a country pub in the North of England. This pub offers customers food, drinks and some evening entertainment (on selected days). Paul has a small team of waiters and bar staff that work for him. There is a new employee starting today. Tim, the new employee, begins his shift cleaning and making drinks. At around midday, Paul takes Tim to the bar to prepare him for the regular crowds. Paul takes Tim through what the regulars usually order, when they order it and how to make those drinks. He also shows Tim how to input custom orders on their cash register.

At 7pm, Tim spots the first regular. The customer asks Tim if he is new, what he is interested in and if he is still at college. Tim responds and the conversation goes on for some time. Before the end of the night, Tim has earned a tip and the customer expresses their enjoyment.

The next day, a local band is set to perform. This is going to be the busiest night of the week for Paul. Tim is working and remembers the customers usual orders. He remembers that on his first shift, the customer asked for a specific usual drink. At 7pm, the customer returns. The customer gives Tim a nod to show he has entered and to start making a drink. Tim pours the customer a drink and has it waiting for him before he has sat down.

Tim has poured the customer a drink and has already added it to the tab and the customer thanks Tim. Tim spends the rest of the night working as usual and by the end of the evening has a list of regular orders saved to his memory that make his job easier and his customers are happier.

Let's look at an example of bad customer care.

Warning… DON’T TRY THIS AT HOME.

**LongtimeLegal LTD**

Cathay works for a legal services group. They offer legal support as well as many other services. On Friday, Cathay came into contact with Thomas. Thomas was looking for some advice. His landlord had not been in contact about the leaking roof and now Thomas has to find somewhere else to stay while he waits for the repairs. Thomas is looking for advice on what to do, who he can talk to about this issue and what sort of compensation he could get. Thomas came prepared with a folder of photos, of the damage, and some quotations from local tradespeople on how much it would cost to fix the roof and ceiling. Cathay told Thomas, almost immediately, that she would need to look over the information. She told him to go back home and wait for her call. Almost a week later, Cathay called Thomas to tell him to return to the office the same day. Thomas was unavailable as he was at work and, given the short notice, could not ask for the afternoon off. Cathay asked Thomas how important it was to get legal help. Thomas asked his manager for the afternoon off and explained his situation. His manager allowed it but warned Thomas that this was the first and last time this could happen.

When Thomas arrived, the office area was busy. Cathay asked Thomas to come take a seat and began to ask him a series of personal questions. After Thomas answered, he wondered how they were important to the case. Cathay told Thomas to try speaking to his landlord to get the ceiling repaired, which Thomas had already told Cathay he had done. She then continued to state that if the roof wasn't fixed soon, there could be other damages. Again Thomas had already told her there were other damages.

After around 25 minutes of Cathay asking for useless information Thomas stated that he needed to get back to work. Cathay told him that this case wasn’t an easy one and that unless Thomas cooperated with her, then he could end up paying out for damages to the property.

Thomas began to leave the building. Cathay stopped him and began asking him about whether he would be looking to buy a house and if he needed a solicitor. Thomas was a bit annoyed by this and told her that he didn’t need that service and continued to walk out.

**Can you highlight all of the examples of bad customer care in the example above? Where did Cathay lack the skills to deal with the situation? What could she have done differently?**

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Now let's take a look at a conversation between a shop owner and a customer to see how we can deliver good customer service.

**A customer buys a product**

**Shop Owner:**

Hello there, can I help you with anything?

**Customer:**

Hi, I was just looking for some drill attachments. I need these three attachments. Do you have them in stock?

**Shop Owner:**

If you just give me one second, I will have a look at our system to see if we have it in stock for you.

[The owner searches for the item]

I can see we actually do have that item in stock currently, or we have all three of those items in a multipack which would work out cheaper than buying all three separately. Buying the multipack would save you almost 50%.

**Customer:**

Oh, that is brilliant. Could I have a look at the multipack please?

**Shop Owner:**

Absolutely.

[The Shop Owner goes to the stockroom to get the product to show the customer]

Here is the multipack, do these look like what you need?

**Customer:**

Yes they look like the attachments I need. Thank you

**Shop Owner:**

Brilliant. Is there anything else I could help you with today?

**Customer:**

No thank you, that is all I needed. I will take the multipack please.

**Shop Owner:**

Then your total will be £9.99

[Customer enters their PIN on the card reader and successfully pays for their items]

Thank you, that has gone through. Here are your items. Have a great day.

**Please turn to the next page of your activity book. Please read the activity map to understand what you will be assessed on. For this assessment, you will need to arrange a time to be observed. Please arrange this with your assessor.**

Now it’s time to put this into practice, demonstrate your abilities, behaviours, knowledge and skills relating to customer care within a situation familiar to yourself. This does not necessarily need to be within a work environment as you will come into contact with customers in many different places.

**As the Assessor for:**

(Insert name in text box below)

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I confirm that I have witnessed them present themselves appropriately and provide customer care to a high standard using appropriate verbal and non-verbal communication techniques ensuring that they were fully understood and that they identified and addressed the needs of the customer.

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| **Assessor Name** |  |
| **Signature:** |  |
| **Date:** |  |

**Activity Mapping**

Now you have completed the activities to demonstrate your knowledge and skills it is time for your Assessor to map your work against the standards listed below.

By doing this they will be making sure that the work you have provided by completing the activities meets the requirements for you to gain your certificate.

Your Assessor will provide you with feedback on how you have done and whether any more work may be required.

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| **Assessment Criterion – The Leaner can:** | **Activity Number or Reference Number of Additional Activities:** | **Assessor Signed Off (✓/✗):** |
| Identify own needs as a customer | 1 |  |
| Provide three examples of customer needs within a straightforward context | 2 |  |
| Provide three examples of customer care | 3 |  |
| Use appropriate customer care within a familiar setting based on identified customer needs | 4 |  |

**Assessor Feedback**

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**Authenticity Declarations**

**Learner Declaration**

By signing this declaration, you agree that the evidence provided within this workbook has been produced by you and meets the requirements of being authentic, sufficient, valid and current to the standards required.

**Learner Signature:**

**Date:**

**Assessor Declaration**

By signing this declaration, you agree that you have assessed all of the evidence produced within this workbook and have ensured that the work is that of the learner. You are also declaring that during the learning process you have ensured that the evidence is authentic, sufficient, valid and current to the standards required.

**Assessor Signature:**

**Date:**

**IQA Signature (if applicable):**

**Date:**

**Additional Evidence Forms**

Use these additional forms in order to record additional evidence for the activities within this workbook where additional space is required.

Ensure that each piece of evidence entered on these forms is clearly labelled with the corresponding activity number.

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**Helpful Resources & References**

**Helpful Resources**

Good Customer Service - <https://www.reed.co.uk/career-advice/good-customer-service-examples/>

Understanding your customers <https://www.mcorpcx.com/articles/why-understanding-your-customers-is-the-first-step-to-delivering-a-better-customer-experience>

Principles of truly understanding your customers

<https://www.forbes.com/sites/williamcraig/2018/07/10/10-key-principles-for-truly-understanding-your-clients/?sh=4d81f7c56504>

**References**

<https://www.forbes.com/sites/blakemorgan/2018/03/05/customer-experience-vs-customer-service-vs-customer-care/?sh=195a214d4167>

<https://www.youtube.com/watch?v=KJpwF7Nc3dk>

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