Unit 313: Establish and maintain relationships in the Building Services Engineering sector

# Delivery guide

Unit information

This unit consists of knowledge, understanding and performance and enables learners to develop and maintain positive relationships with clients and customers associated with the installation and/or maintenance activities in the building services engineering sector in accordance with:

* appropriate industry standards and regulations
* the specification
* working practices
* the working and natural environment.

The learner will have the responsibility for establishing and maintaining client and customer relationships and will be able to:

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

Learners may be introduced to this unit by asking themselves questions such as:

* What is the technical and functional information required for my work?
* How can I provide excellent customer service?
* Why is data protection important?

Learning outcomes

1. Understand the types of technical and functional information that is available for the installation and/or maintenance activity
2. Understand the procedures for supplying technical and functional information to relevant people
3. Understand the importance of customer service in relation to installation and/or maintenance activity

This delivery guide only covers the knowledge and understanding elements within this unit, not the performance criteria which are specific to the learner’s workplace. The performance criteria for this unit are listed below:

1. Supplying technical and functional information
2. Providing accurate guidance and advice to the clients and customers on technical and functional matters
3. Handover procedures
4. Maintaining productive working relationships with clients and customers
5. Respond effectively to requests for technical and functional information
6. Following procedure for any variations
7. Complying with organisational standards for appearance and behaviour

Suggested resources

Textbooks

* Gashe, M., Byrne, K. (2020) *The City & Guilds Textbook: Plastering for Levels 1 and 2*. London: Hodder Education.

ISBN 978-1-3983-0647-9

Websites

* [AT Internet | GDPR Quiz: Questions and Answers on the Protection of Personal Data](https://blog.atinternet.com/en/15-questions-to-test-your-gdpr-knowledge/)
* [Business Balls | Role playing and role play games process and tips](https://www.businessballs.com/amusement-stress-relief/role-playing-and-role-play-games-process-and-tips/)
* [Contracts Counsel | What is a Contractual Agreement?](https://www.contractscounsel.com/t/us/contractual-agreement)
* [ICO | Guide to the UK General Data Protection Regulation (UK GDPR)](https://ico.org.uk/for-organisations/guide-to-data-protection/guide-to-the-general-data-protection-regulation-gdpr/)
* [SIUE | Elements of Effective Group Presentations](https://www.siue.edu/artsandsciences/acs/SpeechCenter/EffectiveGroup.shtml)
* [YouTube | Step by step directions for creating a mind map](https://www.youtube.com/watch?v=oY4sUQzXJ1g)

Legislation

* [GOV.UK | Data protection](https://www.gov.uk/data-protection)
* [GOV.UK | Consumer Rights Act 2015](https://www.legislation.gov.uk/ukpga/2015/15/contents)
* [GOV.UK | Equality Act 2010](https://www.legislation.gov.uk/ukpga/2010/15/contents)
* [GOV.UK | Equality Act 2010: guidance](https://www.gov.uk/guidance/equality-act-2010-guidance)
* [GOV.UK | Guidance on promoting British values in schools published](https://www.gov.uk/government/news/guidance-on-promoting-british-values-in-schools-published)
* [GOV.UK | The use of social media for online radicalisation](https://www.gov.uk/government/publications/the-use-of-social-media-for-online-radicalisation)

| **Learning outcomes** | **Criteria** | **Delivery guidance** |
| --- | --- | --- |
| 1. Understand the types of technical and functional information that is available for the installation and/or maintenance activity | * 1. The sources of technical and functional information | * Learners to research, discuss and refer to their own industry practice and workplace experience to improve their understanding of technical and functional information including appropriate health and safety information such as: * manufacturer information and data * supplier information and data * information from their employing organisation * installation specifications * client/customer specifications * specifications * drawings * diagrams. |
| * 1. Interpret technical and functional information and data | * Learners to collaborate in small groups and discuss their own workplace experience of how to interpret some of the following documentation: * manufacturer/supplier information and data * materials * components * equipment * information from their employing organisation * installation specifications * client/customer specifications * specifications * drawings and * diagrams. |
| 1. Understand the procedures for supplying technical and functional information to relevant people | * 1. The stakeholders that require technical and functional information | * Learners to produce a mind map of the stakeholders who would be involved with a small project relevant to their chosen pathway. * Learners to collaborate and discuss their mind maps to include stakeholders such as: * clients * customers * major contractors * other services * site managers. |
| * 1. The limits of responsibility of own job role with respect to supplying technical and functional information | * Learners to research and understand the limits of their current job role and to understand when to allow line manager/supervisor to act. |
|  | * 1. The methods of providing technical and functional information | * Learners to collaborate and discuss their workplace experience of their own organisation’s methods of providing technical and functional information. |
| * 1. The importance of ensuring that: * information provided is accurate and complete * information is provided clearly, courteously, and professionally * copies of information provided are retained * the installation, on completion, functions in accordance with the specification, is safe and complies with industry standards | * Learners to collaborate and discuss their workplace experience of their own organisation’s methods and practice to ensure that: * information provided is accurate and complete * information is provided clearly, courteously and professionally * copies of information provided are retained * the completed installation functions in accordance with the specification * the completed installation is safe and complies with industry standards. * Learners to engage in a role play scenario of a task to highlight the use of the above workplace practices. |
| * 1. The methods for checking that relevant persons have an adequate understanding of the technical and non-technical information provided | * Learners to collaborate and discuss their workplace experience of their organisation’s methods and practices to ensure that relevant persons have an adequate understanding of the technical and non-technical information provided. * Learners to research techniques such as: * assumption of baseline knowledge * impact not process * illustrate to educate. |
| 1. Understand the importance of customer service in relation to installation and/or maintenance activity | * 1. The methods and organisational procedures for establishing positive relations with clients and customers | * Learners to collaborate and discuss their workplace experience of their organisation’s methods and practices to ensure that the procedures in place work to establish positive relations with clients and customers. * Learners to work in small groups to create a mind map of the methods and organisational procedures for establishing positive relations with clients and customers. * Learners to discuss and dissect their mind maps in group presentations. |
| * 1. The working requirements and practices of the clients and customers in the working environment where the installation and/or maintenance activity is taking place | * Learners to discuss their workplace experience of their own organisation’s methods and practices. * Learners to ensure that the working requirements and practices of the clients and customers in the working environment for the installation and/or maintenance activity are met. |
| * 1. The opportunities and regulations that affect the way that technical and functional information is delivered to clients and customers | * Learners to research and understand the main requirements to process technical and functional information in compliance with the key principles of the Data Protection Act 2018 (the UK’s implementation of the General Data Protection Regulation (GDPR)). * Learners to understand the clients’/customers’ basic rights under the Consumer Rights Act 2015 which covers the main points of the Equality Act 2010. * Learners to collaborate and discuss their workplace experience of their own organisation’s methods and practices to ensure that the technical and functional information is delivered to clients and customers. |
| * 1. The clients' and customers' rights including any contractual agreements | * Learners to collaborate and discuss their workplace experience of their own organisation’s methods and practices to ensure that they understand the clients' and customers' rights, including any contractual agreements. * Learners to research and understand contractual agreements between the clients and customers. |