

Unit FM3.03: Customer and stakeholder relations in facilities management

The assessment criteria form part of the unit and specify the standard that a learner is expected to meet to demonstrate that the learning outcomes within the unit have been achieved. The additional guidance, which is shown in brackets and italics alongside the assessment criteria, does not technically form part of the unit, in that it is not included in the reference version of the unit shown by the Register of Regulated Qualifications. The additional guidance is provided to illustrate how the assessment criteria might be interpreted. The BIFM will generally expect assessors to interpret the assessment criteria as described, or to an equivalent level of demand.

Aim of the unit:

This unit addresses methods to ensure that customers and other stakeholders contribute to the maintenance, and evaluation of facilities supplies and services. It relates closely to the unit on specification and procurement of facilities supplies and services (FM3.04), which addresses the customers' and suppliers' roles specifying what supplies or services will be required. Both units are written to apply at an operational rather than at a strategic level.

<i>Title</i>	Customer and stakeholder relations in facilities management	
Ofqual ref	K/504/5744	
Level	3	
Credit value	5	
Learning outcomes	Assessment criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 understand the needs of customers and other stakeholders affected by a facilities supply or service	1.1	distinguish between the: <ul style="list-style-type: none"> clients responsible for commissioning a facilities supply or service users of the supply or service other stakeholders who will be affected by the way in which the supply or service is delivered <i>(See below)</i>
	1.2	identify the main interests of each of these groups in the facilities supply or service <i>(See below)</i>

	<p>1.3 determine the information that the different groups will require to monitor their interests (<i>See below</i>)</p> <p>1.4 determine how delivery of the information will need to be scheduled so that they can take timely action if necessary (<i>See below</i>)</p> <p><i>(ACs 1.1 to 1.4 should be evidenced using examples from the learner's own experience and/or case study. The interests/information requirements of each group might cover a variety of factors including cost/financial performance, legal/statutory compliance, specific performance against contract, service specification, customer service, risk management and business continuity)</i></p>
<p>2 understand how the information required can be supplied by using different channels of communication</p>	<p>2.1. describe how to use communications channels that provide access to information, and the benefits and limitations of such mechanisms, including help desks, web pages and meetings (<i>No further guidance</i>)</p> <p>2.2. describe how to use communications channels that send information to users, and the benefits and limitations of such mechanisms, including briefings, guidance notes, email, telephone, newsletters and formal reports (<i>No further guidance</i>)</p> <p>2.3. identify appropriate communications channels for the information required by clients, service users and other stakeholders (<i>Using examples from the learner's own experience and/or case study to apply the</i></p>

	<i>evidence provided for ACs 2.1 and 2.2 above)</i>
3 understand how customer satisfaction can be monitored by using different channels of communication	<p>3.1 identify and analyse relevant management data to provide information about customer satisfaction and potential difficulties, including usage rates, key performance indicators and performance standards (<i>See below</i>)</p> <p>3.2 describe how to use mechanisms that enable customers to volunteer feedback, and the benefits and limitations of such mechanisms, including complaint logs and staff suggestion schemes (<i>See below</i>)</p> <p>3.3 describe how to use methods that ask customers directly for feedback, and the benefits and limitations of such methods, including interviews, focus groups and questionnaires (<i>See below</i>)</p> <p><i>(ACs 3.1 to 3.3 should be evidenced using examples from the learner's own experience and/or case study)</i></p>
4 be able to recommend actions to resolve issues affecting customer satisfaction	<p>4.1. identify the causes of the issues affecting customer satisfaction (<i>See below</i>)</p> <p>4.2. identify practical actions to address the causes, where possible (<i>See below</i>)</p> <p>4.3. identify additional forms of communication to publicise the actions, and/or to address the customers' perceptions (<i>See below</i>)</p> <p><i>(ACs 4.1 to 4.3 should be evidenced using the same examples as ACs 3.1 to 3.3 above. Actions should include those that distinguish between</i></p>

	<i>issues that can be measured objectively (i.e. using data) and those that derive from customer perception (i.e. subjectively based) of facilities management performance)</i>	
Additional information about the unit		
Details of the relationship between the unit and relevant National Occupational Standards or other professional standards or curricula (if appropriate)	The unit is mapped to the Facilities Management National Occupational Standards FM 301, FM302, FM304, FM305, FM310, FM317 and FM319.	
FM Professional Standards reference	FM functional area:	FM functional area component:
	Quality Management and Customer Service	Customer Service
		Stakeholder Relationships

Resources:

[The CRM Handbook: A Business Guide to Customer Relationship Management \(Information Technology\)](#) by Jill Dyché

[The Service Level Agreement SLA Guide - SLA Book, Templates for Service Level Management and Service Level Agreement Forms. Fast and Easy Way to Write Your SLA](#) by Gerard Blokdijk and Ivanka Menken

[Service Level Agreement 100 Success Secrets: SLA, Service Level Agreements, Service Level Management and Much More](#) by Gerard Blokdijk

[Foundations of Service Level Management \(Sams Professional\)](#) by Rick Sturm and Wayne Morris

[The Nordstrom Way to Customer Service Excellence: A Handbook for Implementing Great Service in Your Organization](#) by Robert Spector and Patrick D. McCarthy

[The Nordstrom Way to Customer Service Excellence: A Handbook for Becoming the "Nordstrom" of Your Industry](#) by Robert Spector and Patrick D. McCarthy

[Customer Care Excellence: How to Create an Effective Customer Focus \(Customer Care Excellence: How to Create an Effective Customer Care\)](#) by Sarah Cook

[Unleashing Excellence: The Complete Guide to Ultimate Customer Service](#) by Dennis Snow and Teri Yanovitch

[Happy About Customer Service?: Creating a Culture of Customer Service Excellence](#) by Ken Welsh

[Best Practice Guide for Customer Service Managers: An Activity-based Workbook for Leaders of Teams That Strive for Service Excellence \(Customer Service Best Practice Guides\)](#) by Trevor G. Arden, Stephanie E. Edwards, and Anne-Marie Sonneveld

Customer Service: Aiming for Excellence by Timothy P. Bonomo
Business Success Through Service Excellence by Moira Clark and Susan Baker
FM World www.fm-world.co.uk
www.bifm.org.uk
www.instituteofcustomerservice.com/
[A Practical Guide to Facilities Management](#) by Ian C Barker MCIQB