
Unit Specification

UHB212 – Advise and consult with clients

Unit reference number: M/617/1713

Level: 2

Guided Learning (GL) hours: 63

Overview

The aim of this unit is to develop learner's knowledge and understanding of the important skill of consulting with clients to determine their needs and requirements.

An essential part of this unit is making suitable recommendations for services and products based on this information and the results of the examination of client's hair, skin and scalp.

Learners will need to maintain health, safety and hygiene salon procedures throughout the unit. Additionally, learners must maintain their personal appearance and demonstrate effective communication and consultation skills.

Learning outcomes

On completion of this unit, learners will:

LO1 Be able to consult with and advise clients

LO2 Understand the relevant policies and procedures when carrying out consultation services

LO3 Understand the science of hair, skin and scalp

Unit content

LO1 Be able to consult with and advise clients

Prepare to consult with and advise clients

Taught content to include

- Presenting positive working relationships with client's, staff and visitors
- Presenting and creating a good first impression, for example a client is more likely to return to the salon where there is a friendly and attentive environment
- Using non-technical jargon and limited technical terms
- Knowledge of the salon services, products and pricing structure
- Adapting consultation techniques when communicating with clients from different cultural and religious backgrounds, age, disabilities and gender
- The ability to use open and closed questioning techniques
- Observing client's behaviour and body language
- Listening to the tone of voice and vocabulary used and encourage and allow time for clients to ask questions
- Offering refreshments if and when available or appropriate along with reading materials
- Ensuring there is enough space to be able to sit beside or opposite the client without being in proximity to other people; the client may not freely speak if they feel others are listening
- Ensuring any background music is not too loud or intrusive for conversation
- Using visual aids to help identify the client's wishes which may include:
 - Photographs
 - Pictures in trade magazines
 - Colour charts
 - Magazines or books
 - Drawings
 - Internet downloads on a tablet or smartphone
- Accurately identifying any factors that may affect the service
- Considering the client's lifestyle, maintenance time and hairstyle
- Analysing the client's hair, skin and scalp to include; hair growth patterns, hair characteristics, texture, density and elasticity
- Analyse and identify the hair classification:
 - Type 1 – straight hair
 - Type 2 – wavy hair
 - Type 3 – curly hair
 - Type 4 – very curly hair
- Identifying suspected infections or infestations of the hair or scalp
- Identifying head and face shape
- Confirming the client understands and agrees the service
- Conducting all relevant tests
- Looking at and reviewing client's records of previous services
- Knowledge of the salons pricing structure for services and how to calculate charges

Apply safe and hygienic methods of working throughout services

Taught content to include

- Ensuring the work area is clean and well organised
- Ensuring the chair is adjusted to a workable height for the learners, but is also comfortable for the client. Where necessary a foot stand could be positioned for client comfort
- Minimise the risk of damage to products, tools and equipment
- Minimise the wastage of products
- Minimise the risk of cross-infection
- Making effective use of the working time
- Ensure the use of clean resources
- Minimise the risk of harm or injury to themselves and others

Carry out consultation services

Taught content to include

- The limits and boundaries of their duties and responsibilities and why it is important to explain these to the client
- Confirm with the client the look agreed at consultation prior to starting the service and that the desired outcome has a realistic expectation
- Ensure appropriate questions are directed to the client to establish any known contra-indications to the hair service
- Accurately record the client's responses to questioning where appropriate
- Conduct a range of tests on the client's hair and skin following manufacturers' instructions and recognised industry procedures
- Check hair and scalp for contra-indications
- Consult and inform with the client throughout the service
- Advise and consult with manager/senior stylist where appropriate

Carry out relevant tests

Taught content to include

- The dates of services and any tests carried out
- Reasons why tests are conducted, examples include:
 - Protect the client from harm
 - To ensure the service can be carried out
 - To check for contra-indications
 - To ensure the outcome is as expected
 - Prevent legal action
 - Maintain the salons reputation
- Types of tests will include:
 - Porosity test
 - Elasticity test
 - Development strand test
 - Skin test
 - Incompatibility test
 - Pull test

Provide clients with advice and recommendations

Taught content to include

- Discuss and confirm client's needs and requirements before, during and after service
- Discuss limitations and/or potential outcomes of chosen service(s) this may include:
 - Colouring services
 - Lightening services
 - Cutting services
 - Perming services
 - Relaxing services
 - Setting and dressing services
 - Styling and finishing services
 - Hair and scalp treatments
 - The amount of time available for daily maintenance
 - The time limits and/or suggested return visits for maintenance services
 - Impact of the client's lifestyle regarding the service recommendations, examples may include:
 - Work – working environments may restrict certain styles, colours and lengths of hair
 - Sporting activities – some sports require the hair to be kept off the face by regulation, or due to extensive training can withstand regular washing and heat styling
 - Leisure activities
 - Forthcoming special occasions such as a wedding or prom – hair may need to be grown longer to be able to be styled accordingly
 - Religion – to comply with certain religious rules and traditions
 - Age – from children through to seniors, age may influence the suitability of recommended styles, cuts and colour services
 - Gender – gender specific variation in hair growth, males may experience hair thinning and loss due to male pattern baldness
 - Personality
 - Client's own care abilities – some clients are skilled and committed to managing their hair. Others, perhaps due to an injury or lack of guidance, may not have the skills to manage certain style
- Consult with client throughout the service
- Give advice and recommendations accurately and constructively
- Provide aftercare advice including potential costs of further services or products
- Update clients service record

LO2 Understand the relevant policies and procedures when carrying out consultation services

The responsibilities for health and safety in own role

Taught content to include

- Relevant legislation for consultation, client care, confidentiality and consumer/retail, for the country the qualification is taken, which includes: General Data Protection Regulation (GDPR), consumer rights, health and safety, equality. Health and safety regulations for the country where the qualification is taken, examples within the United Kingdom would include:
 - The Health and Safety at Work Act
 - The Management of Health and Safety at Work Regulations
 - Provision and Use of Work Equipment Regulations
 - Personal Protective Equipment at Work Regulations
 - Electricity at Work Regulations
 - Reporting Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
 - The Consumer Protection Act
 - The Trade Descriptions Act
 - Control of Substances Hazardous to Health Regulations (COSHH)
 - Salon insurance requirements, employers liability, public liability, professional indemnity
- Responsibilities for health and safety to include:
 - The reasons why all staff working in the salon have a responsibility for the health and safety of themselves and others
 - The salon safety regulations to ensure their actions do not put others at risk, which includes all staff, clients and visitors
- Additional factors will include:
 - The reasons why it is important to accurately describe the features and benefits of products and services
 - The reasons and importance for gaining client consent
 - The maintenance of the salon environment including:
 - The comfort of the salon
 - Cleanliness of the salon to prevent cross-infections via direct or indirect contact
 - Provisions and use of workplace equipment – using only products, tools and equipment trained to use
 - Reasons for personal protective equipment (PPE) e.g. using protective gloves to prevent contact dermatitis when using certain products and all chemicals
 - Making visual checks on all electrical equipment and reporting faults/isolating power
 - Ensuring manufacturers' instructions are always followed when using products and equipment
 - Responsibilities of reporting certain work-related incidents or accidents, diseases and dangerous occurrences to a senior staff member
 - Ensuring the public are protected from the manufacture of supplied unsafe goods or misleading price indications
 - Prevent a false trade description to any goods that are supplied or offered to supply any goods to which a false trade description has been applied, or false statement about the provision of any service
 - Ensure that all personal client data records remain safe and confidential
 - Update client records following service

When and how tests are carried out

Taught content to include

- Skin test/allergy alert test – 24-48 hours before a colour (depending on manufacturers' instructions), to test for an allergic reaction or sensitivity. Cleanse a small area of skin behind the ear. Mix a small amount of the darkest colour with 6% hydrogen peroxide (or manufacturers' developer) and apply a small amount to the cleansed area. This should not be washed off by the client for at least 24-48 hours. A positive reaction would mean the client is contra-indicated to the service
- Elasticity test – internal strength of cortex. On wet hair, take individual strand of hair from 3-4 areas of the head – if hair is dry then dampen thoroughly. Hold one single hair securely and pull it – if the hair stretches and returns to its original length without breaking – it has normal elasticity. If hair breaks or fails to return to its original length it has low or no elasticity
- Porosity test – external strength of cuticle – take a few strands of hair, slide down towards the scalp using one finger and one thumb. The more resistance felt, the more porous the hair
- Test cutting/colour test – to check suitability of desired outcome prior to colouring or lightening the hair. Take a few cuttings from various parts of the head. Secure with cotton or adhesive tape. Mix a small amount of the desired colour(s) with the correct strength of hydrogen peroxide and place the cuttings into the colour. Process as per manufacturers' instructions. Rinse and remove the colour and assess the results
- Development strand test – to establish the correct development of colouring or lightening product applied. Remove a small amount of the colour or lightening product with cotton wool from different parts of the head once the development time has been reached to determine if the desired result has been achieved
- Test curl/development test curl – to establish to development/degree of curl when perming solution is applied. This test can be achieved during and at the end of the desired development time of the perming service to ensure the desired curl has been achieved
- Pull test – testing the strength of the hair before other services e.g. temporary hair attachments or twisting and plaiting hair. Take a small amount of hair between the thumb and middle fingers from the base of the hairs near the scalp (approximately 30-60 hairs). Firmly pull hairs from the scalp. If more than 10% of hairs are pulled out this may indicate active shedding and extreme care in handling the hair is required, along with advice and guidance to the client
- Incompatibility test – before chemical services to detect the presence of metallic salts or other products that may be incompatible. Take a cutting from the hair, secure with cotton or adhesive tape. Pour 20mls of liquid 6% hydrogen peroxide into a non-metallic bowl. Add 5 drops of ammonium hydroxide. Leave for up to 30 minutes. If there are no compatible substances on the hair there should be no reaction in the bowl. Where metallic salts are present the liquid will react with the hair and it may change colour or disintegrate

The importance of following current relevant legislation

Taught content to include

- Knowing the reasons and importance of following the regulations and acts of the country in which this qualification is offered, regarding the impact these would have for both themselves, clients, visitors and other staff members. This will include:
 - Professional salon image
 - Prevent legal action
 - Prevent accidents and dangerous occurrences happening

How to communicate effectively when carrying out consultation services

Taught content to include

- Use open questions that require more than one answer to gain information from the client
- Use closed questions which can be used to close the consultation service and confirm agreement from the client
- Adopt a positive body language, examples will include good stance, arms uncrossed, eye contact and smiling
- Establish client requirements – avoids misunderstandings, ensures client satisfaction, reduces complaints
- Create positive working relationships with client's, staff, visitors
- Improve client retention, for example, a client will be more inclined to return to a stylist who has communicated well and offered the best advice suited to their needs
- Importance of giving the client realistic expectations of the chosen service(s)
- Language difficulties e.g. limited speech, vocabulary or accents may present a barrier
- Cultural differences e.g. choice of vocabulary could potentially cause offence
- Physical disabilities e.g. speech, hearing problems may present a barrier
- Psychological difficulties e.g. low self-esteem and a lack of client confidence may make communicating difficult
- The importance of not discriminating against illnesses and disabilities

The importance of providing clients with advice and recommendations

Taught content to include

- Discussing the client's needs and requirements
- Discussing the possible limitations of requirements or future services
- Consulting with the client throughout the service
- Ensuring the client is informed of the products and services available
- Provide the opportunity for the clients to ask further questions or seek clarification

L03 Understand the science of hair, skin and scalp

The different hair characteristics and classifications

Taught content to include

- Hair classifications

Hair classifications table			
Type 1: Straight hair	1A - Fine/thin	1B - Medium	1C - Coarse
	Straight	Straight with volume	Straight difficult hair
Type 2: Wavy hair	2A - Fine/thin	2B - Medium	2C - Coarse
	'S' pattern	Frizzy 'S' pattern	Very frizzy 'S' pattern
Type 3: Curly hair	3A - Fine/thin	3B - Medium	3C - Coarse
	Soft curl	Loose curl	Tight curl
Type 4: Very curly hair	4A - Fine/thin	4B - Medium	4C - Coarse
	Tight coiled curl pattern	'Z' pattern and spring curl	Tight 'Z' pattern

- Hair characteristics:

- Elasticity – the hair's ability to stretch and retract to its original size
- Porosity – the condition of the cuticle
- Texture – the feel of an individual hair – fine, medium or coarse, examples may include:
 - Caucasian – wavy and straight
 - African type – very curly, fine, medium
 - Asian – straight
- Density – the number of hairs on the scalp
- Hair condition – if it's been chemically or physically affected by chemicals or external elements
- Growth patterns – the direction the hair grows from the scalp and how difficult growth patterns can influence chosen service/style

The basic structure of the hair and skin

Taught content to include

Structure	Function
Cuticle – overlapping colourless scales	Forms a protective surface to the hair
Cortex – fibrous middle layer containing colour pigments	Contains colour pigments and gives the hair it's strength and where all chemical and physical changes take place
Medulla – central innermost part of the hair	No known function and does not play any useful part in hairdressing processes and treatments
Epidermis	The protective surface layer of the skin
Dermis	The thickest layer of the skin containing the hair follicle, blood supply, sweat gland, nerve endings and lymph vessels
Subcutaneous layer	The fatty layer, provides insulation and energy for the body
Sensory nerve endings	Sensory organs for detecting heat, touch, cold and pain
Lymph vessels	Filter and transport fluid away from tissues
Blood supply	Provide oxygen and nutrients to the hair papilla
Sebaceous gland	Produces sebum to protect the hair and skin
Dermal papilla	The growing area of the hair follicle
Sweat gland (apocrine and eccrine)	Produces sweat to cool the skin, apocrine found on the scalp, eccrine all over the body
Arrector pili muscle	Muscle contracts to raise the hair into an upright position to trap in air for warmth
Hair follicle	Tube-like structure from which the hair grows
Hair shaft	The hair, provides protection to the scalp from the sun
Hair bulb	The area at the base of the follicle containing the dermal papilla

The growth cycle of hair

Taught content to include

- Anagen – growing stage; active stage, most hair is in this stage at any one time
- Catagen – changing stage, a small percentage of hair is in this stage at any one time
- Telogen – resting stage, the hair is not growing and is separated from the hair bulb
- Early anagen – new hair begins to form
- Knowledge of hair growth will enable learners to give advice on the frequency of visits for maintaining styles
- Knowledge of how hormones affect the hair growth cycle
- Knowledge relating to related to hair growth problems

The importance of identifying factors that may limit or affect services

Taught content to include

- Avoiding mistakes, examples may include:
 - Identifying correct base shade when selecting colour
 - Using the correct percentage hydrogen peroxide
- Preventing damage to the hair and scalp
- Preventing legal action
- Informed consent
- Hair condition, scalp condition
- Non-infectious and infectious hair and scalp conditions
- Previous hairdressing services
- Head and face shape
- Lifestyle
- Hair growth patterns
- Hair and skin tests

How factors may limit or affect services and choice of products

Taught content to include

- Contra-indications that may prevent services to include:
 - Adverse skin conditions
 - Bacterial, viral or fungal infections
 - Infections or infestations
- Results of tests – may prevent or restrict services being offered, or determine products, tools and equipment being used and services offered
- Density – defined as the numbers of hairs on the scalp and will affect the products, tools and equipment used and can impact on costs and timings when carrying out services. Example may include additional treatment products, application and processing time required for coarse tight curly hair
- Texture – defined as the feel of each individual hair and indicate how strong or weak the hair shaft is. For example fine hair may absorb a shampoo product easily requiring a lesser amount as over use may saturate the hair making it heavy for styling purposes
- Elasticity – this defines the inner strength of the hair shaft and the hair's ability to return to its original strength, and will affect the products, tools and equipment used for a service. Examples may include, hair that has poor elasticity may require specialist products or treatments and may not be suitable for chemical services
- Porosity – the porosity defines the external strength of the hair shaft and what condition the cuticle is in, e.g. running fingers gently up and down the hair shaft will indicate swollen or flat cuticles. As elasticity hair with poor porosity may require specialist products and treatment and may not be suitable for certain other services
- Growth patterns – the direction of hair growth is unique to its owner and must be considered when decided the application methods and techniques used, e.g. double crowns are difficult to lay foils/meche/foam when colouring or lightening hair, learners will need to consider how to approach the crown in the application method
- Head and face shape and size – this relates to the overall shape and size of client's head and includes specific features. This should be considered when planning services. For example the use of visual aids to show the client how a style may look or where adaptations may be necessary, placement could emphasis specific features
- Lifestyle – the client's everyday activity and work patterns. Client's home routine may require discussions and advice and recommendations made regarding the upkeep of the hairstyle
- Hair length – this should be considered when providing costing and timings to client
- Other services previously undertaken either at home or at a salon
- Cost of maintaining the desired service – this has impact to the client regarding affordability and longevity of having a specific service or style and may require the stylist to make adaptations. For example multi coloured foil application on long straight hair may be too costly or require too much maintenance for a client
- Temperature and humidity of the salon – this has a considerable effect on the development of colouring and lightening products, heat can speed up the process and coolness can slow it down therefore salon and client temperature must be considered. Humidity is the amount of water vapour present can build in a salon when there is little/no ventilation
- Hygroscopic nature of the hair – this is the ability of hair to absorb moisture. Weather, temperature and humidity play an important role in the hair's ability to remain in its given state (style). Therefore it is important that the hair is thoroughly dried at the end of a styling services and in damp raining conditions additional products may be required to help the hair maintain its style

How test results influence services

Taught content to include

- Confirming the service can proceed
- Offering alternative services where hair is either in poor condition or not compatible for chemical product services
- Preventing damage to the scalp or hair
- Prevention of the client taking legal action – ensure all tests and test results are recorded
- Preventing the reputation of the salon being damaged
- Avoiding mistakes
- Results of tests:
 - Skin test/allergy alert test – a positive reaction would prevent chemical services
 - Elasticity test – may prevent or restrict some services if the hair is stretched and does not go back to its original state
 - Porosity test – the hair's ability to retain moisture. Where hair is porous it may prevent or restrict some services e.g. perming or colouring. Porous hair tends to process chemical reactions quickly and can therefore over-process easily. Additional advice to client may include hair treatments, restyle or cut
 - Incompatibility test – hair will result in the hair becoming discoloured or dissolving a positive reaction will prevent chemical services, e.g. perming, lightening and colouring
- Test cutting/colour test – proceed with service if desired colour or lightening depth is met
- Test curl/development test curl – once desired degree of curl is met proceed with normalising/neutralising

How to recognise hair, skin and scalp problems and necessary actions to take

Taught content to include

- The importance of recognising a contra-indication of the scalp and/or hair
- Non-contagious – may prevent or restrict services due to severity of condition, including:
 - Sebaceous cyst – tender or sore raised bump on skin, which if infected or inflamed will contain pus
 - Psoriasis – common skin condition that changes the life cycle of skin cells. Causes a build-up of skin cells which may appear thick silvery and inflamed. May cause itching
 - Contact dermatitis – is a rash caused by the skin reacting to a substance it has come into contact with e.g. chemicals. Symptoms can be varied and include:
 - Skin redness
 - Extreme itching
 - Oozing or blisters, may make skin swell
 - Skin that appears darkened or hard/leathery to touch that may become dry or flaky
 - Sensitive to products and sunlight
 - Seborrhoea – over activity of sebaceous glands by excessive secretion of sebum resulting in an oily coating on the skin
 - Scalp sensitivity – an inflamed, sore and red scalp may prevent direct heat being placed on scalp therefore affecting the styling of the hair
 - Recent scar/tissue injury may be tender and sensitive to chemical
 - Alopecia
 - Total hair loss on the scalp
 - Loss of hair in patches on the scalp

- Traction alopecia – hair loss at the point of tension
- Male pattern baldness – may present as receding hair line and hair loss at crown
- Hair loss as a result of chemotherapy – usually temporary and hair is lost over scalp and body
- Hair loss as a result of medication or medical conditions, e.g. thyroid imbalance
- Hair loss as a result of hormonal changes, e.g. after giving birth
- Contagious hair and skin disorders, as they could prevent, restrict, change or alter the planned service, examples include:
 - Bacterial infection examples include:
 - Impetigo – begins as blisters that itch, then fill with a yellowish-brown fluid, that once rupture becomes a flat crust
 - Folliculitis – infection of the hair follicle, causes bumps with pus. May be painful, itchy, sore or swollen
 - Viral infection examples include:
 - Herpes simplex, a raised red blister full of fluid. It will usually be painful and tender to the touch
 - Warts, small, fleshy, grainy bumps usually flesh-coloured, white, pink or tan. Rough to the touch and can be sprinkled with black pinpoint, which are small, clotted blood vessels
 - Fungal infection examples include:
 - Ringworm – depends where it appears but may be red, itchy, scaly, or raised patches that develop blisters or begin to ooze. Patches that may be redder on the outside edges creating a ‘ring’ effect
 - Infestation/parasites examples include:
 - Head lice – are tiny grey/brown insects. Head lice cling to hairs but stay close to the scalp which they feed off. Head lice lay eggs which hatch after 7 to 10 days. It takes about 7 to 10 days for a newly hatched louse to grow into an adult and start to lay eggs known as nits. Nits are the empty yellow-white eggshells which are left when the lice hatch. Nits look like dandruff but stick strongly to hair
 - Scabies – itchy skin condition causing a rash which may cause tiny blisters or sores where mites have burrowed into the skin
- Hair defects, including:
 - Trichorrhhexis nodosa – hair which breaks easily. Symptoms can include patches of hair loss or extremely short hair that appears not to grow. The hair shaft has thickened or thinned areas or has excessively split ends with discolouration
 - Monilethrix – is a condition that affects hair growth. Its most characteristic feature is that individual strands of hair have a beaded appearance that results in short, fragile and broken hair
- Other known allergies, examples may include intolerance to nuts or certain oils
- The course of action to be taken if contra-indications are suspected to include:
 - The limits and boundaries of duties
 - Not to offer diagnosis
 - Which conditions need reporting and when
 - Who to report to and where to record the findings
 - Referral for medical attention or advice

Unit requirements

Learners are required to complete all assessment requirements related to this unit:

1. Service portfolio
2. Theory examination
3. Synoptic practical examination

1. Service portfolio

Learners must produce a service portfolio which is required to be completed under the supervision of a lecturer who must monitor the quality of the services performed throughout the learner's training.

The performance of learning outcome 1 must be demonstrated as part of all technical observations and will be recorded on **at least three observations**. This must be conducted on a range of new and existing clients.

The service portfolio must be completed and marked prior to the learner completing the theory examination and the synoptic practical examination.

2. Theory examination

Learners must complete a theory examination for this unit. This will consist of a multiple choice question paper.

The theory examination will test knowledge and understanding from across learning outcomes 2 and 3. Learners should use the unit content sections of this unit to aid revision.

3. Synoptic practical examination

Learners must complete a synoptic practical examination for this unit which will be externally set by the awarding organisation and examined and marked by an external examiner. The synoptic practical examination will take place at the end of the period of learning.

Document History

Version	Issue Date	Changes	Role
v1	01/08/2018	First Published	Qualifications Manager
v2	14/02/2019	Update to ITEC branding as primary colour and logo	Qualifications Administrator