

# Understand customers and customer retention

## UBU54

---

The aim of this unit is to develop your knowledge and understanding of customer relationships and the benefits of a loyal customer to an organisation. You will learn about customer retention and the techniques to attract and retain customers to your organisation.

Level

3

Credit value

4

GLH

35

Observation(s)

0

External Paper(s)

0



### Learning outcomes

---

#### On completion of this unit you will:

1. Understand Customer Relationship Management (CRM)
2. Understand customer retention
3. Understand the measurement of customer satisfaction

### Evidence requirements

---

#### 1. Knowledge outcomes

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

#### 2. Tutor/Assessor guidance

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

#### 3. External paper

There is no external paper requirement for this unit.

# Developing knowledge

## Achieving knowledge outcomes

---

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below\*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

\*This is not an exhaustive list.

## Relationship to National Occupational Standards

---

Customer Service (2013) National Occupational Standards:

- CFACSB14 Review the quality of customer service
- CFACSB15 Build and maintain effective customer relations

## Learning outcome 1

### Understand Customer Relationship Management (CRM)

You can:	Portfolio reference
a. Explain the concept of the “customer experience”	
b. Explain different methods of segmenting and characterising customers	
c. Explain the purpose and scope of CRM	
d. Describe the features of an effective CRM system	
e. Explain the uses of CRM data in customer service delivery	

## Learning outcome 2

### Understand customer retention

You can:	Portfolio reference
a. Explain the term customer retention	
b. Explain the benefits of customer retention to an organisation	
c. Explain the factors that influence customer retention	
d. Describe techniques used to attract and retain customers	
e. Explain how to assess the extent of customer loyalty	
f. Explain the factors involved in customer recovery	

## Learning outcome 3

### Understand the measurement of customer satisfaction

You can:	Portfolio reference
a. Describe techniques used to analyse performance data	
b. Explain the factors to be taken into account in setting performance targets and objectives	
c. Explain the features and uses of a range of techniques to measure customer satisfaction	

# Notes

Use this area for notes and diagrams



---

---

---

---

---

---

---

---

---

---

# Notes

Use this area for notes and diagrams



---

---

---

---

---

---

---

---

---

---



VTCT, Aspire House, Annealing Close, Eastleigh,  
Hampshire SO50 9PX United Kingdom

Web:- [www.itecworld.co.uk](http://www.itecworld.co.uk)

Email:- [customerservices@itecworld.co.uk](mailto:customerservices@itecworld.co.uk)



Copyright © Vocational Training Charitable Trust  
February 2019