

UBT247

Client care and consultation

Unit reference number: F/615/6164

Level: 3

Guided Learning (GL) hours: 20

Overview

This unit is about understanding the principles of client care when providing professional consultations prior to and following treatments. Learners will develop the knowledge and skills required to prepare for and carry out consultations, demonstrating a high standard of client care. Learners will further develop their communication skills and know how to identify and communicate realistic and appropriate treatment objectives.

Learning outcomes

On completion of this unit learners will:

LO1 Know the salon requirements related to client care and consultations

LO2 Know the principles of client care

LO3 Know the principles of consultation

LO4 Be able to conduct a client consultation

Assessment requirements

Learners must complete **all** assessment requirements related to this unit:

1. Portfolio of evidence

1. Portfolio of evidence

Learners will carry out a series of practical observations for their programme of study which will be observed, marked and graded pass or fail by centre assessors.

Whilst the theory content of LO1, LO2 and LO3 may be naturally assessed in the practical assessment, it is a requirement that it is evidenced in the portfolio.

Learners must produce a service portfolio. Simulation is not allowed in this unit. The service portfolio for this unit must include client consultation and care records for treatments covering all of the following:

- Carried out a minimum of **4** consultations on different clients or treatments
 - New clients
 - Existing clients
 - Male or female
- Used **all** consultation techniques
 - Verbal
 - Non-verbal
 - Written
- Considered **all** implications
 - Cost of maintenance
 - Frequency of maintenance (if applicable)
 - Advice on further or additional treatments
 - Benefits
 - Effects of and limitations to other services
 - Changes to existing care routine
- Considered **all** factors limiting or affecting services
 - Adverse hair, skin or nail conditions (if applicable)
 - Results of previous services and products used
 - Clients' lifestyles
 - Thermal, tactile or sensitivity test results
- Taken **all** courses of action
 - Offering information
 - Advice and guidance
 - Referral to sources of support in line with salon's procedures
- Given **all** types of advice
 - Relating to client expectations/realistic outcomes
 - Possible contra-actions
 - Aftercare
 - Specific additional products and treatments

Service portfolios may be sampled by the VTCT External Quality Assurer (EQA).

Unit content

LO1 Know the salon requirements related to client care and consultations

Describe how to prepare and set up the work area:

Prepare the area to allow for

- Health and safety standards – a safe working environment
- The work area is clean and well-organised
- The chairs are adjusted to a workable height for the learners, but are also comfortable for the client
- Ease of access and free movement, checking the lighting is appropriate and the area is suitably private for carrying out a consultation
- Refreshments are offered; client comfort whilst carrying out the consultation – sitting comfortably, heating, ventilation, any necessary modifications to ensure optimum comfort
- Completion of all necessary records – ensure all necessary documents are in place prior to the client arriving
- Any background music must not be too loud or intrusive for conversation
- Visual aids are available if required for the consultation

Describe how professional technicians and therapists present themselves:

Clean professional uniforms create a positive impression of the nail technician or therapist and the salon. Uniforms should be made from a comfortable fabric to facilitate the stretching involved in the treatment

- An excellent presentation will give a positive image and create a good first impression. Also, nail technicians modelling on-trend nail designs present optimal marketing opportunities for salons
- Therapists should wear closed-in footwear, no jewellery, no piercings, hair neatly tied back, and any fringe secured
- Personal hygiene and cleanliness including showering, covering cuts and abrasions, wearing deodorant or antiperspirant, oral hygiene (including clean teeth, fresh breath), are all important elements of professional presentation

Explain the salon requirements for record keeping:

Client records are an effective resource within a salon and provide accurate information regarding client treatments and services, history of clients, the products used, the dates of treatments and services and any tests carried out.

- The importance of making records available **prior** to the treatment or service
- How to complete client records in accordance with the organisation
- The importance of gaining client consent
- The importance of accurate completion of records
- The importance of secure storage and security of client records
- The importance of confidentiality and the consequences if confidentiality is not maintained

Describe the types of information recorded on record cards:

Consultation record keeping, relevant contra-indications, signatures, refer to existing records, clear information, be accurate and work in a logical order (name, address, contact numbers, age range, reason for treatment or service, occupation, sport/hobbies, medical history, allergies/hypersensitivity, contact lenses, contra-actions).

- Adaptations and modifications, future recommendations (specific products and treatments and services), retail sales

- Treatment/service plan, update records at the end of the treatment, update at each visit, maintained electronically, paper records
- The importance of signatures

Define the roles and responsibilities of specialist service providers:

Learners must know the salon or organisational procedure for referring clients to others if adverse conditions are suspected. Learners must also understand the importance of, and reasons for, not naming specific conditions when referring clients to other professionals. Learners must know the limits and boundaries of their duties and responsibilities and why it is important to explain these to the client. For referral to be effective learners must have knowledge of the roles of other professionals and the specialist services they can offer

- General practitioner
- Pharmacist
- Chiropodist
- Trichologist
- Dermatologist

Explain the insurance and legislation implications when carrying out client consultations:

- Responsibility to show good practice and professional competence
- Commitment to professional ethics
- A legal requirement to perform a consultation before every treatment, even for regular clients
- Failure to carry out a consultation can invalidate insurance and clients may claim against the nail technician/therapist/salon
- Damage to reputation and loss of clients could ruin a business
- As a minimum a salon should hold, where applicable, employer's insurance as well as public liability insurance and professional indemnity insurance
- Relevant legislation for consultations and client care includes data protection, health and safety, equality acts
- The most current information on legislation is available at www.legislation.gov.uk

Explain the legal requirements for providing treatments to minors:

- The age at which an individual is classed as a minor and how this differs nationally

Describe the salon standards for communicating with clients:

- Verbal communication – speaking manner and tone of voice, being respectful, sensitive to client, being supportive, using open questions, using appropriate vocabulary, using tact and diplomacy
- Non-verbal communication – eye contact, appropriate and inappropriate body language, active listening
- Adapting and tailoring approaches for different clients, e.g. new and existing clients, according to gender, age, culture, occasion
- Written – show clarity and conciseness, attention to spelling, grammar and presentation of written information
- Clarification – checking client understanding to ensure the outcome is suitable for the client

Describe how to deal with client complaints:

- Appropriate communication skills
 - Verbal communication – speaking manner and tone of voice, being respectful, sensitive to the client, using tact and diplomacy
 - Non-verbal communication – eye contact, appropriate and inappropriate body language, actively listening
- Referring complaints to a relevant person – the manager or person in charge
- Assist in complaints being resolved – take responsibility for ensuring a suitable conclusion is achieved that is satisfactory for the client

Explain the importance of meeting salon standards with regard to communication skills:

- Employability – essential to support success professionally
- Life skills – essential to support success personally
- Professional – good practice, essential for client understanding and client satisfaction, essential to promote positive working relationships with colleagues
- Avoid misunderstandings – reduces staff issues, reduces complaints, improves client retention

LO2 Know the principles of client care

Describe the important factors related to client care:

- Professional image – first impression, create trust and confidence
- Client-centred approach – providing client care and comfort throughout the consultation, offering a personalised approach to ensure that the client's needs are met
- Wrap around – a consistent approach to client care is required both prior to and following the treatment or service
- Client satisfaction – meeting client expectations through the quality of care and through taking appropriate time for the consultation
- Professional communication skills – consistently demonstrated, both prior to and following the treatment, provide an opportunity for the client to ask questions and respond appropriately, e.g. clear speech at a low level, avoiding use of slang and technical language, avoid discussing your personal issues and views on religion, sex and politics, listening to the client's needs and requirements, using open body language and maintaining eye contact
- Sensitivity and awareness of the client's needs is demonstrated at all times
- Consider client needs and comfort ensuring any necessary modifications are in place
- Treatment plan clearly communicated with the client to provide an explanation of the appropriate products and planned treatment or service techniques. Respond to any factors that may be a barrier to providing optimum client care. Provide an explanation of the planned realistic treatment outcomes. Demonstrate a flexible approach if necessary to agree on the treatment or service outcome
- Client reassurance – given when necessary. Recommend the use of appropriate products following the treatment or service in order to support optimum results for the client

Describe the impact of poor client care on both the therapist or nail technician and the business:

- Lack of satisfaction – causing a loss of clients who may seek out competitors
- Loss of reputation – unhappy clients will complain and will tell others
- Financial impact – loss of income and less profit, loss of job
- Complaints

Explain the factors that can reduce the effectiveness of client care:

- Language difficulties – limited language abilities or accents may present a barrier
- Cultural differences – choice of vocabulary could potentially cause offence
- Physical disabilities – speech, hearing problems may present a barrier
- Psychological difficulties – low self-esteem and a lack of client confidence may make communicating difficult

LO3 Know the principles of consultation

Describe the reasons for carrying out a consultation with a client:

- Consultation is the process for gaining information about the client to assist the therapist in developing their knowledge of the individual to match it to their personal skills, abilities and attitudes, documenting the information clearly and concisely
- Analysis helps identify the general and specifics for example skin, nail, posture, muscular, physical conditions and stress levels, along with the correct products to use and treatment or service to perform
- A legal requirement and failure to consult properly with clients prior to treatment or service could invalidate your insurance. It is essential that therapists and technicians elicit information from their clients about their medical history, including any allergies, as well as checking for contra-indications. The client consultation underpins all technical abilities and should be delivered prior to the delivery of any technical treatment or service and following all treatments or services as a wraparound process
- Seeking clarification of the client's understanding
- Checking client satisfaction
- Providing feedback and aftercare advice such as possible contra-actions and homecare products
- Providing opportunities for clients to ask questions

List the methods of gaining relevant information during consultation:

- In general, assessment can be objective or subjective. Objective assessment is a form of questioning which has a single or multiple specific correct answers. Subjective assessment is a form of questioning which may have more than one current answer (or more than one way of expressing the correct answer)
- Verbal communication – there are various types of objective and subjective questions. Objective question types include true/false, multiple choice and multiple-response etc. Subjective questions include extended-response questions; both are effective consultation techniques to establish a fuller picture of the client and their needs. Open questioning related to treatment gains a quick response, open questions give more scope for information gained from responses, closed questions result in yes or no answers
- Advantages of verbal communication are quick, instant response with quantitative information
- Disadvantages of verbal communication are no written record, no time to consider your reaction, no paper trail. Effective verbal questioning requires recording for future reference and to reaffirm understanding of the responses given
- Non-verbal communication includes eye contact, body language, observation of subtle signals not vocalised
- Advantages of body language – expression of feelings, sometimes giving a better insight into an individual's state of mind than they are willing to provide verbally, others can easily identify anger, happiness, confusion, discomfort
- Disadvantages of body language – cannot hide feelings, can be a barrier, easy to make the wrong assumption based on the individual's ability to read the situation

Describe when communicating how to adapt to different cultural needs:

There are many cultural differences that effects communication, learners must understand how to vary communication techniques to meet all clients' needs. Learners must

- Avoid using slang terms and idioms
- Avoid stereotyping
- Be sensitive to different religious needs
- Use more visual aids as appropriate
- Be specific
- Be patient

LO4 Be able to conduct a client consultation

Prepare self and work area for consultation:

- Ensure safe and hygienic working area
- Area is well organised
- A private and comfortable area to consult in
- All the required paperwork to ensure a professional consultation
- Professional appearance that meets salon standards – appropriate personal presentation for uniform, hair, nails and hygiene

Prepare and utilise client records:

Client records play a vital role in providing information about the history of the client's treatments and services. Learners must prepare records by ensuring the following factors

- The records are available for the consultation
- The record belongs to the client by checking the client's personal details
- Scrutinising the record and noting factors that may limit the intended treatment or service
- Referring to the record during discussions to aid clarification regarding the client's history of treatments and/or services and updating the accuracy of what is recorded
- Using the information as a starting point for discussion for the intended salon treatment or service, e.g. products and chemicals that have been used, and the outcomes of previous treatments or services
- Creating a new client record for clients who have not previously attended the salon
- Adhere to legislative requirements regarding safety, confidentiality and security of records

Demonstrate consultation techniques:

- Professional communication skills – verbal and non-verbal
- Identify the key information it is necessary to gain from the client to understand the client expectations and to achieve the outcome that will be mutually agreed during the explanation
- Ensure the most suitable questioning skills are used to gain the information – objective, subjective, open questions
- Listen and responding appropriately, adapting and tailoring responses for different client's needs, e.g. new and existing
- Complete all necessary records prior to and following the treatment
- Recommend suitable products and/or future treatments or services to the client following the treatment or service
- Ensure that appropriate aftercare advice is explained to the client
- Show commercial awareness and maximise the opportunity by recommending products and promoting future treatments and/or services

Identify factors which may limit or affect the desired outcome:

- Recognise the importance of checking for allergies and contra-indications, to avoid reactions, invalidation of insurance policy
- Provide treatments or services in line with the age of consent and regulations for treating minors
- Ensure client suitability

Communicate a treatment/service plan to the client:

- Draw on the information gained during the consultation and prior experience to produce a personalised treatment/service plan for the client
- Explain the treatment/service plan and gain agreement for the planned outcomes
- Identify any limitations to the treatment or service
- Discuss cost and frequency of treatments and services

Gain signatures to evidence client approval and consent:

- Gain signatures and consent

Provide recommendations and aftercare advice:

- Update relevant records prior to and following the treatment or service to meet salon and industry requirements, consider the standard of communication skills (written), follow required confidentiality policies/procedures, data protection and any other relevant legislation
- Aftercare to include – follow up treatments or services, maintenance, professional product recommendations, advice on improving skin, nail or body conditions, contra-actions

Update the client's treatment records:

- Update changes in client's personal details
- Record results of tests
- Identify factors limiting or affecting the service
- Techniques used for the treatment or service, in detail
- Products used for treatments or services and timings
- Outcome of the treatment or service, success of the treatment or service, client satisfaction suggestions for the next treatment or service
- Use clear and accurate language and ensure the record is completed in full
- If the record is handwritten, the writing must be legible

Complete the consultation within the commercially specified time:

- Demonstrate an awareness of the needs and requirements for consultation within the limits of commercially acceptable time frames

Assessment criteria

In order to pass this unit, learners must achieve all pass criteria. The pass criteria relate to the proficient demonstration of skills and knowledge. These will be evidenced in the portfolio of evidence.

Learning outcome The learner must:	Pass The learner can:
LO1 Know the salon requirements related to client care and consultations	P1 Describe how to prepare and set up the work area
	P2 Describe how professional technicians and therapists present themselves
	P3 Explain the salon requirements for record keeping
	P4 Describe the types of information recorded on record cards
	P5 Define the roles and responsibilities of specialist service providers
	P6 Explain the insurance and legislation implications when carrying out client consultations
	P7 Explain the legal requirements for providing treatments to minors
	P8 Describe the salon standards for communicating with clients
	P9 Describe how to deal with client complaints
	P10 Explain the importance of meeting salon standards with regard to communication skills
LO2 Know the principles of client care	P11 Describe the important factors related to client care
	P12 Describe the impact of poor client care on both the therapist or nail technician and the business
	P13 Explain the factors that can reduce the effectiveness of client care
LO3 Know the principles of consultation	P14 Describe the reasons for carrying out a consultation with a client
	P15 List the methods of gaining relevant information during consultation
	P16 Describe when communicating how to adapt to different cultural needs
LO4 Be able to conduct a client consultation	P17 Prepare self and work area for consultation
	P18 Prepare and utilise client records
	P19 Demonstrate consultation techniques
	P20 Identify factors which may limit or affect the desired outcome
	P21 Communicate a treatment/service plan to the client
	P22 Gain signatures to evidence client approval and consent
	P23 Provide recommendations and aftercare advice
	P24 Update the client's treatment records
	P25 Complete the consultation within the commercially specified time

Version	Details of amendments	Date
2	Clarification on which assessment criteria will be covered in the external examination – pages 2 and 11.	