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# Unit Specification

## UBT286 – Consultation and Client Care

Unit reference number: Y/650/6630

**Level: 2**

**Guided Learning (GL) hours: 20**

### Overview

The aim of this unit is to understand 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 relating 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

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# Unit content

## LO1 Know the salon requirements relating to client care and consultations

### How to prepare and set up the work area

#### Taught content

- Health and safety standards – a safe working environment
- Clean and well-organised working area
- Chairs adjusted to a workable height for the learners and comfortable for the client
- Ease of access and free movement, lighting is appropriate and the area is suitably private for carrying out a consultation
- Client comfort is achieved whilst carrying out the consultation – refreshments offered, sitting comfortably, heating, ventilation, any necessary modifications to ensure optimum comfort
- selection 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

### Personal presentation

#### Taught content

- Well-fitting uniforms made from a comfortable fabric to facilitate the stretching involved in the treatment
- Closed-in footwear, no jewellery, no piercings, hair neatly tied back, and any fringe secured, nails well-manicured, short and free of varnish
- Personal hygiene and cleanliness including showering, covering cuts and abrasions, wearing deodorant or antiperspirant and oral hygiene

### Salon requirements for record keeping

#### Taught content

- Legal requirement, provide accurate information regarding client treatments or service, history of clients, the products used, outcomes achieved, the dates of consultation, treatment/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 and legal guidelines
- 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, working in accordance with current data protection legislation of the country therein

## Types of information recorded during consultation

### Taught content

- Recording relevant information such as relative and absolute contra-indications, disclosed conditions, clients consent signatures, name, address, contact numbers, age range, reason for treatment or service, occupation, sport/hobbies, medical history, allergies/hypersensitivity, contact lenses and any contra-actions that may have occurred
- 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
- Recording of visual media, taking photographs/videos of the treatment area where relevant and depending on the treatment requirements
- The importance of signatures

## Roles and responsibilities of specialist service providers

### Taught content

- Salon or organisational procedure for referring clients to others if adverse conditions are suspected. 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. Knowledge of the roles of other professionals and the specialist services they can offer:
  - General practitioner
  - Pharmacist
  - Chiropodist
  - Trichologist
  - Dermatologist

## Insurance and legislation implications when carrying out client consultations

### Taught content

- Good practice and professional competence
- Commitment to professional ethics
- A legal requirement to perform a consultation for all new and regular clients before every treatment
- 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 including data protection, health and safety, equality acts, legislative requirements setting out the rights of the individual and the professional
- Cooling off periods
- The most current information on legislation is available at [www.legislation.gov.uk](http://www.legislation.gov.uk)

### **Legal requirements for providing treatments to minors**

#### Taught content

- The age at which an individual is classed as a minor and how this differs nationally and internationally
- Salon and legal protocols be followed when treating minors
- Safeguarding implications for minors or vulnerable adults

### **Salon standards for communicating with clients**

#### Taught content

- Verbal communication – speaking manner and tone of voice, being respectful, sensitive to client, being supportive, using open and closed 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, for example new and existing clients, show awareness of the client’s diverse needs and adapt communications appropriately, for example when communicating with those of different ages or from different cultural backgrounds
- Written – show clarity and conciseness, professionalism and presentation of written information
- Clarification – checking client’s understanding and expectations to ensure the outcome is suitable for the client

### **How to deal with client complaints**

#### Taught content

- Appropriate communication skills – be patient, listen, respond, take action, advise (if asked)
- 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

### **The importance of meeting salon standards with regard to communication skills**

#### Taught content

- Employability – essential to support success professionally
- Life skills – essential to support success personally
- Professionalism – 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

### Important factors relating to client care

#### Taught content

- Professional image – first impression, creating 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 prior to, during 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, during and following the treatment, provide an opportunity for the client to ask questions and respond appropriately, for example clear speech at a low level, avoiding use of slang and technical language, avoid discussing personal issues and own 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 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. Use of 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

### Impact of poor client care

#### Taught content

- 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 – in person/verbal, in writing, online – social media platforms

### Limits of own authority

#### Taught content

- How to report a risk or hazard
- When to report a risk or hazard
- When to refer or seek guidance from a senior staff member, manager or salon owner
- Follow the organisation's policies and procedures and understand limits of own authority within job role

## Factors that can reduce the effectiveness of client care

### Taught content

- Language difficulties – limited language abilities or accents may present a barrier
- Cultural differences – choice of vocabulary could potentially cause offence
- Health conditions or impairments such as speech or hearing problems may require adaptation of communication techniques, for example the use of visual or audio aids
- Psychological difficulties – low self-esteem and a lack of client confidence may make communicating difficult

## LO3 Know the principles of consultation

### Reasons for carrying out a consultation

#### Taught content

- Process for gaining information about the client to assist the practitioner 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 specific client information, for example skin, nail, posture, muscular, physical conditions and stress levels, along with the correct products to use and treatment or service to perform
- Legal requirement, failure to consult properly with clients prior to treatment or service could invalidate insurance. It is essential that practitioners and technicians elicit information from their clients about their medical history, including any allergies, as well as checking for contra-indications. Client consultation underpins all technical abilities and should be delivered prior to and during 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 home care products
- Providing opportunities for clients to ask questions

### Gaining relevant information during consultation

#### Taught content

- Subjective assessment, objective assessment
- Verbal communication – types of objective and subjective questions
- Advantages of verbal communication
- Disadvantages of verbal communication
- Non-verbal communication
- Advantages of body language
- Disadvantages of body language

### How to adapt communication techniques to different cultural needs

#### Taught content

- There are many cultural differences that affects communication, learners must understand how to vary communication techniques to meet the diverse needs of clients. Communicate in a professional manner, using terminology appropriate to the service/treatment provided
  - Avoid using slang terms and idioms
  - Avoid stereotyping
  - Be sensitive to different religious needs
  - Use visual aids as appropriate
  - Be specific
  - Be patient

## LO4 Be able to conduct a client consultation

### Prepare self and work area for consultation

#### Taught content

- Safe and hygienic working area
- Area is well organised in an ergonomic manner
- Private and comfortable area to consult in
- All the required records are in place 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

#### Taught content

Records must be prepared 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, such as 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
- Adhering to legislative requirements regarding safety, confidentiality and security of records

### Demonstrate consultation techniques

#### Taught content

- Professional communication skills – verbal and non-verbal
- Identifying 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
- Ensuring the most suitable questioning skills are used to gain the information – objective, subjective, open questions
- Listening and responding appropriately, adapting and tailoring responses for different clients' needs, such as new and existing clients
- Completing all necessary records prior to and following the treatment
- Recommending suitable products and/or future treatments or services to the client following the treatment or service
- Ensuring that appropriate aftercare advice is explained to the client
- Showing commercial awareness and maximising the opportunity for promoting suitable products and treatments/services

### **Identify factors which may limit or affect the desired outcome**

#### Taught content

- Recognising the importance of checking for allergies, sensitivity and contra-indications, to avoid reactions, invalidation of insurance policy
- Providing treatments or services in line with the age of consent and regulations for treating minors or vulnerable adults
- Ensuring client suitability

### **Communicate a treatment/service plan to the client**

#### Taught content

- Drawing on the information gained during the consultation and prior experience to produce a personalised treatment/service plan for the client
- Using visual media such as photographic or video evidence (following legislative procedures for visual media)
- Explaining the treatment/service plan and gaining agreement for the planned outcomes
- Identifying any limitations to the treatment or service
- Discussing cost and frequency of treatments and services
- Gaining signatures and consent

### **Provide recommendations and aftercare advice**

#### Taught content

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

## Skin cancer awareness

**Please note this information will not be assessed for the achievement of this unit.**

Public awareness of skin cancer has never been higher, and yet skin cancer remains the fastest growing cancer in the UK, especially amongst young people. The chances of a positive outcome can be dramatically increased with early identification and diagnosis.

Professionals in hair, beauty, sports massage and health and wellbeing industries work closely with clients and in many cases have sight of areas of skin which may not be easily visible to the client. An informed awareness of the signs, symptoms and changes of appearance to be aware of when checking for early signs of cancer is a crucial tool for the conscientious practitioner in order to provide the most thorough service and in some cases, possibly lifesaving information.

Signs to look for when checking moles include utilising the ABCDE guide:

**A** – Asymmetry – the two halves of the area/mole may differ in their shape and not match.

**B** – Border – the edges of the mole area may be irregular or blurred and sometimes show notches or look ‘ragged’.

**C** – Colour – this may be uneven and patchy. Different shades of black, brown and pink may be seen.

**D** – Diameter – most but not all melanomas are at least 6mm in diameter. If any mole gets bigger or changes see your doctor.

**E** – Elevation/evolving – elevation means the mole is raised above the surface and has an uneven surface. Looks different from the rest or changing in size, shape or colour. Anyone can get a suspicious mole or patch of skin checked out for free by the NHS by visiting their doctor, who may then refer to a dermatologist (an expert in diagnosing skin cancer).

If you require any additional NHS information please refer to <https://www.nhs.uk/be-clear-on-cancer/symptoms/skin-cancer>

If your learners are interested in learning more about skin cancer awareness alongside this qualification, VTCT offers the following qualification: VTCT Level 2 Award in Skin Cancer Awareness for Non-Healthcare Professionals.

This qualification has been specifically designed for those working in the sports massage, health and wellbeing, beauty, hairdressing and barbering sectors. It will enable learners to identify any changes to their client’s skin and to highlight those changes to the client using appropriate language and communication skills. It will enable the learner to raise awareness of skin cancer and signpost their clients to public information about skin cancer.

This qualification will enable hair, beauty and wellbeing professionals to gain the appropriate knowledge and communication skills required to provide non-diagnostic, professional advice and information to clients in a discrete, empathetic and confidential manner.

For more information please refer to the Record of Assessment book:

<https://qualifications.vtct.org.uk/finder/qualfinder/1Record%20of%20Assessment%20Book/AG20529.pdf>

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# Assessment requirements

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

1. Portfolio of evidence
2. Theory examination
3. Internal practical assessments

## 1. Portfolio of evidence

As part of this qualification learners are required to produce a portfolio of evidence. The treatment portfolio for this unit must include client consultation and care records for a minimum of 6 consultation treatments.

The portfolio will confirm the knowledge, understanding and skills that have been achieved. It may be in electronic or paper format. For additional information on how the portfolio must be structured, please refer to the qualification specification.

## 2. Theory examination

The theory content of learning outcomes 1-3 will be tested by an externally set theory examination at the end of the period of learning.

Learners must complete a theory examination for this unit. This will consist of a multiple choice question paper which is mapped to the relevant assessment criteria stated below.

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 since exam questions will test the full breadth of this content over time.

Learning Outcome	Assessment Criteria
LO1 Know the salon requirements relating to client care and consultations	1.1 How to prepare and set up the work area
	1.2 Personal presentation
	1.3 Salon requirements for record keeping
	1.4 Types of information recorded during consultation
	1.5 Roles and responsibilities of specialist service providers
	1.6 Insurance and legislation implications for carrying out client consultations
	1.7 Legal requirements for providing treatments for minors
	1.8 Salon standards for communicating with clients
	1.9 How to deal with client complaints
	1.10 The importance of meeting salon standards with regard to communication skills

Learning Outcome	Assessment Criteria
LO2 Know the principles of client care	2.1 Important factors relating to client care
	2.2 Impact of poor client care
	2.3 Limits of own authority
	2.4 Factors that can reduce the effectiveness of client care

Learning Outcome	Assessment Criteria
LO3 Know the principles of consultation	3.1 Reasons for carrying out a consultation
	3.2 Gaining relevant information during consultation
	3.3 How to adapt communication techniques to different cultural needs

### 3. Internal practical assessments

The learner will be observed completing a minimum of 6 treatments whilst consulting for facial therapy. At a minimum the consultations must cover:

#### **Range for assessment**

Learners must produce a treatment portfolio.

At a minimum the treatment portfolio should contain evidence that learners have:

- Carried out a minimum of 6 consultations on different clients or treatments
  - New clients
  - Existing clients
- Used all consultation techniques
  - Verbal
  - Non-verbal
  - Written
- Considered all implications
  - Cost of maintenance (if applicable)
  - 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 skin conditions
  - Results of previous services and products used
  - Client's lifestyles
  - Thermal, tactile and sensitivity test results if applicable
- Taken all courses of action
  - Offering information
  - Advice and guidance
  - Referral to sources of support in line with salon's procedures
- Obtained informed consent
- Obtained consent for visual media if relevant
- Given all types of advice
  - Relating to client expectations/realistic outcomes
  - Possible contra-actions
  - Aftercare
  - Specific additional products and treatments

The content of LO4 is covered by practical assessments whilst consulting for facial therapy and is mapped to the relevant assessment criteria (see table below). The Practical assessments must take place under the supervision of a lecturer who must observe the quality of the practical demonstrations performed throughout the learner’s training.

The Practical Assessments must take place under controlled conditions, in a realistic working environment on a real client and in a commercially acceptable time frame.

Learning Outcome	Assessment Criteria
LO4 Be able to conduct a client consultation	4.1 Prepare self and work area for consultation
	4.2 Prepare and utilise client records
	4.3 Demonstrate consultation techniques
	4.4 Identify factors which may limit or affect the desired outcome
	4.5 Communicate a treatment/service plan to the client
	4.6 Provide recommendations and service advice

## Document History

Version	Issue Date	Changes	Role
V1.0	01/04/2023	First published	Product and Regulation Coordinator