



# Scottish Property Programmes



MOL Sample Workbook



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QUALIFICATIONS



## **INTRODUCTION TO THE SAMPLE WORKBOOK**

This sample workbook is a guide to the learning materials for the Scottish Level 5 Award in Introduction to Residential Property Management Practice, written and provided by MOL on behalf of the National Federation of Property Professionals Awarding Body (NFOPP AB).

The full range of property qualifications available from MOL/NFOPP AB can be found on the MOL and NFOPP AB websites. The full list of qualifications specific to Scotland is as follows.

### **Award in Introduction to Residential Property Management Practice (Level 5)**

This is an introductory qualification offering basic knowledge in the most important subject areas related to residential letting and property management.

- Unit 1 General Law, Health, Safety and Security in Relation to Residential Letting and Property Management (Level 3)
- Unit 2 Customer Service within the Property Sector
- Unit 3 Introduction to Residential Property Letting Practice
- Unit 4 Introduction to Residential Property Management Practice

### **Technical Award in Residential Letting and Property Management (Level 6)**

This programme is designed as an introduction to the knowledge and understanding required by those working, or aspiring to work, in residential letting agency.

- Unit 1 General Law, Health, Safety and Security in Relation to Residential Letting and Property Management
- Unit 2 Legal Aspects of Letting and Management
- Unit 3 Residential Property Letting Practice
- Unit 4 Residential Property Management Practice

### **Technical Award in the Sale of Residential Property (Level 6)**

The Technical Award in the Sale of Residential Property is designed as an introduction to the knowledge and understanding required by those working, or aspiring to work, in residential estate agency or new homes sales.

- Unit 1 General Law, Health, Safety and Security in Relation to the Sale of Residential Property
- Unit 2 Law Relating to Residential Property Sales
- Unit 3 Practice Relating to Residential Property Sales
- Unit 4 Property Appraisal and Basic Building Construction/Defects

## **Technical Award in Residential Inventory Management and Practice (Level 6)**

This programme covers the law and practice of inventory management and also some aspects of residential letting and property management to set the context within which the inventory manager works.

- Unit 1 General Law, Health, Safety and Security in Relation to Residential Inventory Management and Practice
- Unit 2 Legal Aspects of Residential Inventory Management and Practice
- Unit 3 Residential Letting and Property Management
- Unit 4 Residential Inventory Management and Practice

## **SOON TO BE AVAILABLE ...**

### **Certificate (Level 7)**

The Level 7 Certificate programmes are designed for more experienced people working within agency such as senior negotiators, managers and principles. The full certificate has 8 units, but the first two are carried forward from the relevant technical award. There are four additional technical units specific to each pathway, and two common office/people management units.

The common management units are

- Unit 7 Introduction to Office Management
- Unit 8 Advanced Office Management (Level 8)

The pathways and their technical units are as follows.

### **Certificate in Residential Letting and Property Management**

- Unit 3 Legal Aspects Relating to Residential Letting and Management
- Unit 4 Practice Relating to Residential Property Management
- Unit 5 Appraisal and Residential Property Letting Practice
- Unit 6 Applied Law Relating to Residential Letting and Management (Level 8)

### **Certificate in the Sale of Residential Property**

- Unit 3 Legal Aspects Relating to Residential Estate Agency
- Unit 4 Practice Relating to Residential Estate Agency)
- Unit 5 Market Appraisal, Value and Inspection Relating to Residential Estate Agency
- Unit 6 Building Design and Defects for Residential Estate Agency (Level 8)



Scottish Level 5 Award in  
**INTRODUCTION TO RESIDENTIAL  
PROPERTY MANAGEMENT PRACTICE**

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**Unit 2**

**Customer Service within the Property Sector**

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Level 5 Scot RLPM sample workbook v2.2 3/2017

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## INTRODUCTION

This unit covers a variety of customer service matters important to the residential letting and management sector. It starts by considering how to deal with customers and how to present information, including some information on advertising.

It deals with methods for obtaining relevant and accurate information from customers and working out the best person to deal with issues raised. There is a section on making appointments, undertaking follow up and obtaining feedback that can be given to relevant parties.

There is an important section on consumer legislation and in particular the Consumer Protection from Unfair Trading Regulations 2008 – an important piece of legislation that has a considerable impact on agency practice. The unit finishes by looking at how to deal with problems and complaints.



## LEARNING OBJECTIVES

Having completed this unit you will know and understand

- how to receive customers and put them at ease
- the different methods of communication – oral, written, face-to-face, on the telephone and electronically
- the various property related services within the property sector and those specific to particular sectors of residential agency
- the need to present a well run office, including personal and office presentation
- the need to produce and maintain accurate records
- how to present information to customers in a variety of ways
- how to make appointments
- why follow up and feedback are important
- the main principles of consumer protection legislation and regulations affecting residential agents
- how to deal with problems and disputes, and a typical complaints handling procedure

## SECTION 1

# Receiving Customers

This section begins by looking at the way in which customers of the agency should be dealt with. It concentrates on the way customers should be treated in a face-to-face situation. We will look at telephone techniques later in this unit.



## LEARNING OBJECTIVES

Having completed this section you will know and understand

- how to acknowledge a customer when they enter your office
- how to greet customers
- how to put customers at ease

## 1.1 ACKNOWLEDGING CUSTOMERS – FREE TO GREET

It is important that customers are acknowledged as soon as they enter the office. If that is not possible because, for example, you are dealing with another customer, then they should be acknowledged as soon as possible after they enter the office. All members of staff should be proficient at greeting people entering the office.

Where you are able to greet the customer face-to-face, you should do so, in a manner that is both professional and puts the customer at ease. You do not want to pounce on them in an intimidating way because that might put the customer off communicating with you. First impressions here are very important



## SELF CHECK QUESTION 1

*How would you like to be greeted if you entered a letting or estate agent's office?*

*Compare your answer with the one given at the end of the section.*

---

Acknowledging customers speedily is important as it demonstrates that you are interested in them and want to help. Greeting them in a friendly way with a genuine smile is the best way of putting them at their ease. If they feel comfortable, they are more likely to talk to you and give information so you can decide how you can help them.

This will give the impression that your agency is friendly and efficient.



**KEY POINT**

- > **When greeting a customer you should smile, say 'good morning/afternoon' and ask if you can help**

**1.2 ACKNOWLEDGING CUSTOMERS – NOT AVAILABLE TO GREET**

If you or another member of staff are not already engaged with a customer, the new customer entering the office should be greeted immediately. If all members of staff are already engaged with other customers, it is important that the new customer is still acknowledged in some way.

It is not necessary to speak to the new customer to acknowledge them, although ideally you would speak to them and greet them.



**SELF CHECK QUESTION 2**

*Can you think of any situations where you would not be able to speak to a customer entering your office?*

*Compare your answer with the one given at the end of the section.*

---

It is important that where you are unable to actually speak to a new customer entering the office, they are nevertheless acknowledged in some way.



**SELF CHECK QUESTION 3**

*How can you acknowledge someone without speaking to them?*

*Compare your answer with the one given at the end of the section.*

---

You will see from the answers to the last two self check questions that circumstances will arise where you are not able to speak to a customer entering the office in order to greet them. However, it is still possible to acknowledge them without speaking – this is often called body language.

The best way to acknowledge the customer entering the office is with eye contact and a smile, and perhaps a nod of the head. If appropriate, eg when you are already speaking to someone on the phone, you will also be able to gesture to the person. This may be to indicate they should sit down, or that you will shortly finish your phone call and be with them. The latter indication could be partly with a hand gesture (eg to sit down) and partly by mouthing the words 'one minute', perhaps holding up one finger at the same time close to your mouth. Most people are able to lip-read if done in an exaggerated way.

The reason you need to acknowledge a customer entering the office is to ensure that you are able to speak to them before they leave, and hence find out why they have come into your office.

### KEY POINTS

- > ***A customer can be acknowledged using body language***
- > ***You should make eye contact and smile***
- > ***Hand gestures or mouthing a greeting can be useful***

## 1.3 THE PURPOSE OF GREETING CUSTOMERS

When a new customer enters the office, you will not know in what capacity they have entered. They may be a potential tenant or landlord, or they may be there on other business. It is important that you find out quickly and deal with them in the most appropriate way.

So, when you greet a customer, you need to find out how you can help them. You would approach, smile and say good morning/afternoon as appropriate and then open the conversation.

You could simply ask 'Can I help you?' The problem with such a question is that it is what is called a closed question. This means one that can be answered 'Yes' or 'No'. If the answer was 'No', that might then make a follow-up question more difficult.

The way round this is to ask the same thing via an open question – one that cannot be answered with 'Yes' or 'No'. So you could say 'How can I help you?' With this question the customer cannot just say 'Yes' or 'No'. They have to say something more, even if they want to say 'No'. They are likely to give you some clue about why they are there.

Even if they do not want to engage with you at that point, for example by saying something like 'I'm just looking at what you have available', it allows you to respond by saying that you are there to help if they want further details and they should just ask.





## ANSWERS TO SELF CHECKS

### QUESTION 1

You probably said that you would like the member of staff greeting you to smile, to say 'good morning/afternoon' as appropriate and ask if they can help you in any way.

### QUESTION 2

Two common situations where you would not be able to speak to a new customer entering your office would be

- when you are already dealing with another customer in the office, and it would not be appropriate to switch your attention to the new customer
- where you are speaking to someone on the telephone

You may have been able to think of other situations.

### QUESTION 3

You can acknowledge someone without speaking to them by

- making eye contact
- smiling
- gesturing with a hand

# Glossary

**aggressive practices**

practices that limit the consumer's freedom of choice through harassment or coercion (also see **misleading omissions** and **misleading practices**)

**applicant**

someone making a formal application for something

**body language**

the conscious and unconscious movements and postures by which attitudes and feelings are communicated

**client**

a person or organisation using the services of a professional person

**closed question**

a question which can only elicit a limited response, such as 'yes' or 'no'

**cloud, the**

although **the cloud** is another name for the internet, it is generally used to mean 'cloud computing', a general term for anything that involves delivering hosted services over the internet

**complaint**

an indication of dissatisfaction

**complaints procedure**

a company's written procedure for dealing with customer/client complaints. This should cover the steps that will be taken to resolve the complaint, or what will happen if the complaint cannot be resolved

**consumer protection legislation**

laws to ensure that customers'/clients' rights are protected, eg the Consumer Protection from Unfair Trading Regulations 2008 (CPRs) which cover commercial practices between traders and consumers, and prohibit certain unfair commercial practices (see also **aggressive practices**, **misleading actions** and **misleading omissions**)

**feedback**

information about reactions to a product or service in order to lead to an improvement in the product or service

**follow up**

literally a continuation of something that has already been started, eg in the property sector this could involve undertaking a market appraisal and following up by checking whether the seller/landlord is now prepared to give instructions or, where a viewing has taken place, whether the prospective buyer/tenant is prepared to make an offer

**informed decision**

a decision only made once all the relevant facts are known



**intonation**

the rise or fall of the voice when speaking

**letting and property management service**

one of the core services offered by residential letting and property management agencies, the others being **let only** and **let and rent processing**. It includes the elements under the **let and rent processing service** as well as ongoing repair and maintenance, periodic property visits to check on condition and the way the tenant is using the property, renewing the tenancy or bringing the tenancy to an end and arranging the checkout

**let only service**

a let only service can be offered where a landlord wishes to undertake the management function. It will normally cover all the processes that need to be undertaken to bring the landlord and the tenant together and willing to sign the tenancy agreement (see also **let and rent processing service**)

**let and rent processing service**

this covers the work indicated previously under **let only**, and will also arrange for the rent to be paid and processed through the agency. It may also include the provision of an inventory where required, and tenant check-in

**misleading actions**

actions that contain false information, or where information is likely to deceive, even if the information is factually correct

**misleading omissions**

misleading omissions are those that omit or hide material information, or provide information that is unclear or ambiguous, or where the commercial intent of the information is obscured

**open question**

a question that cannot simply be answered with 'yes' or 'no'

**oral communication**

to talk and exchange information with another person

**records**

these constitute evidence of something which has already taken place, ie an account kept in writing or some other form

**template**

a preset format for an electronic or paper document, eg an inventory or schedule of condition

**Schedule 1 practices**

Schedule 1 of the CPRs bans 31 commercial practices considered unfair in all circumstances, eg claiming membership of a professional body when not a member, or falsely claiming qualifications (see also **consumer protection legislation**)

**Skype**

software that enables users to make voice calls over the internet

# Reading List

If you are working in letting agency, you should always be aware of changes that take place in law or practice as these will affect the way in which you do your job. If you or your company belong to one of the professional bodies, they will usually keep their members up-to-date with changes that will affect their working practices.

*Delivering Effective Social Customer Service: How to Redefine the Way You Manage Customer Experience and Your Corporate Reputation*, Martin Hill-Wilson and Carolyn Blunt, John Wiley & Sons 2013

*Five Star Service: How to Deliver Exceptional Customer Service*, Michael Heppell, Prentice Hall Business 2010

You may find it useful to check the following publications regularly for relevant articles on letting and management

*Estate Agency News*

*Estates Gazette*

*Negotiator Magazine* (now part of Property Drum)

*Property Professional*

When looking through books, articles and references, and when searching on the web, take care to check the date the material was created. This is particularly important for legal references where the law may change from time to time, but also applies to other areas.

## Useful Websites

[arla.co.uk](http://arla.co.uk) – Association of Residential Letting Agents

[naea.co.uk](http://naea.co.uk) – National Association of Estate Agents

[thedisputeservice.co.uk](http://thedisputeservice.co.uk) – The Dispute Service's Tenancy Deposit Scheme

[tpos.co.uk](http://tpos.co.uk) – The Property Ombudsman scheme







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