



Unit Title: Technical Advice and Guidance

OCR unit number: 26
 Level: 3
 Credit value: 12
 Guided learning hours: 75
 Unit reference number: J/601/3507

Candidates undertaking this unit must complete real work activities in a work environment. Simulation is only allowed in exceptional circumstances (please refer to the centre handbook for further details).

Unit purpose and aim

This unit provides an understanding of the context for providing technical advice and guidance. It also covers practical provision of reactive and proactive advice and guidance on a range of topics.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Understand the context for providing technical advice and guidance</p>	<p>The Learner can:</p> <p>1.1 Describe how technical advice and guidance can be used to:</p> <ul style="list-style-type: none"> • resolve problems • improve performance <p>1.2 Describe the types, sources and applicability of information which can form the basis of technical advice and guidance:</p> <ul style="list-style-type: none"> • information from reference sources (e.g. manuals, handbooks, manufacturer’s specifications) • information derived from the analysis of data (e.g. trend analysis, fault logs) • online information (eg manufacturer’s websites, technical fora discussion groups) <p>1.3 Describe the procedures and constraints which can apply to the provision of technical advice and guidance (e.g. escalation, commercial/contractual, legal/regulatory, information security)</p> <p>1.4 Identify circumstances where technical advice and guidance</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • the needs of their customers and establish what advice and guidance they require and how it will be delivered • technical knowledge that defines the information used for advice and guidance • how to gather technical information from products and services to include: specifications, features, maintenance procedures, life-cycle management

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>should be provided proactively rather than reactively in response to customer requests (e.g. to rectify known faults, to provide new functionality)</p>	
<p>2 Provide reactive technical advice and guidance to customers on a range of topics</p>	<p>2.1 Determine the purposes for which technical advice and guidance is required</p> <p>2.2 Verify that customers are entitled to receive the requested technical advice and guidance</p> <p>2.3 Communicate effectively with customers to elicit sufficient information to enable correct technical advice and guidance to be provided</p> <p>2.4 Source and interpret relevant technical information to produce advice and guidance in response to customer requests</p> <p>2.5 Communicate technical advice and guidance to customers in a format and style which meets their needs, confirming customer understanding of the information provided</p> <p>2.6 Follow organisational procedures for responding to customer requests including the timely escalation of those for which technical advice and guidance can not be provided or does not resolve the request</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • how to gather technical information from a range of sources eg reference manuals, knowledge repositories, historical data, peer and customer meetings, trade journals, training courses. • the different constraints that have to be considered when providing technical advice and guidance • recommend occasions where organisational policies should be suspended or adapted • how to communicate technical information eg: <ul style="list-style-type: none"> - who the correct person is to receive the information - use a suitably agreed format - record the information communicated - audit and quality check the information as at the date of the communication - ensure the information is sufficient for the customer needs - prepare customer documentation to recognised quality standards

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
3 Provide proactive technical advice and guidance to customers	3.1 Identify the purposes for which the technical advice and guidance is required 3.2 Identify the customers, and their level of technical knowledge, to whom the technical advice and guidance should be provided 3.3 Develop technical advice and guidance in a format and style which takes into account the customers' level of technical knowledge 3.4 Follow organisational procedures for providing proactive technical advice and guidance	Candidates must be able to identify: <ul style="list-style-type: none"> • a range of customer types • the purpose of the technical advice and guidance Candidates must be able to support customers in a manner that meets their individual requirements, following organisational procedures.

Assessment

Candidates undertaking this unit must complete real work activities in order to produce evidence to demonstrate they are occupationally competent. Real work is where the candidate is engaged in activities that contribute to the aims of the organisation by whom they are employed, for example in paid employment or working in a voluntary capacity.

Simulation is only allowed for aspects of units when a candidate is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise. When simulation is used, assessors must be confident that the simulation replicates the workplace to such an extent that candidates will be able to fully transfer their occupational competence to the workplace and real situations.

Internal quality assurance personnel must agree the use of simulated activities before they take place and must sample all evidence produced through simulated activities.

It is the assessor's role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has finished a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future. Evidence of questions must include a written account of the question and the candidate's response. Observations and/or witness testimonies must be detailed and put the evidence into context ie the purpose of the work etc.

All of the assessment criteria in the unit must be achieved and clearly evidenced in the submitted work, which is externally assessed by OCR.

Evidence for the knowledge must be explicitly presented and not implied through other forms of evidence.

Evidence requirements

All aspects of the assessment criteria must be covered and evidence must be available that shows where and how the assessment criteria have been achieved.

Assessment Criterion 1

Candidates must identify a range of:

- approaches to customer needs and describe when it would be appropriate to use them to provide advice and guidance and in what situations it would not be appropriate.
- sources that can be used to obtain technical information and the analysis techniques used in order to evaluate the information obtained. The candidate should refer to technical information for products and services.

Assessment Criterion 2

Through different types of activities the candidate must provide evidence of:

Responding to different types of requests for advice and guidance. To include:

- who the customer was
- the advice and guidance they required and why it was appropriate to provide technical advice and guidance
- what technical information they required from products **and** services and from where they obtained it
- at least one example of information obtained from a range of sources and one example of information derived from the analysis of a range of information
- how they validated the information to ensure that it was current, accurate and relevant
- any constraints that had affected the technical advice and guidance provided to the customer
- evidence of selecting appropriate communication techniques to respond to customer needs for advice and guidance (there should be examples of two different media, one of which should include the explanation of complex concepts or information in a simple format)

Candidates should select 6 different constraints that may apply when providing technical advice and guidance and how they would be addressed. One example must include recommending suspension or adaption of organisational policies.

Candidates should also record the advice, guidance and outcomes, using organisational systems, for future reference.

Assessment Criterion 3

Candidates must identify at least 4 different customer types and provide evidence of supporting them in relation to their individual needs.

Candidates are encouraged to choose activities which will allow them to cover all or a majority of the criteria at one time. It is not necessary to use different activities for each element of the criterion.

Guidance on assessment and evidence requirements

Evidence can reflect how the candidate carried out the process or it can be the product of a candidate's work or a product relating to the candidate's competence.

For example: The process that the candidate carries out could be recorded in a detailed personal statement or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the unit.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through.
- candidate responses must be recorded.

It is difficult to give a detailed answer to how much evidence is required as it depends on the type of evidence collected and the judgement of assessors. The main principles, however, are as follows: for a candidate to be judged competent in a unit, the evidence presented must satisfy:

- all the items listed, in the section 'Learning Outcomes'
- all the areas in the section 'Assessment Criteria'

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk .