



Provide Goods and Services

Occupational
Standard Title

MANAGE APPOINTMENTS AND DELIVER CUSTOMER SERVICE

Overview

A good reputation rests as much on delivering consistent, efficient, and respectful service provision as on fitting skill. A successful Equine Fitter works within their limitations and delivers the advertised service. They have excellent interpersonal skills and can engage and educate the client whilst respecting their experience and knowledge.

The Equine Fitter should be prepared with the appropriate forms and checklists, whether physical or digital. They should control how clients can book an appointment, make enquiries, and share initial information. They must balance the reasonable needs of the client, the needs of their business, and their own needs to operate an efficient appointment schedule.

It should be remembered that the professional service extended to clients should apply to anyone to whom goods or services are given, including colleagues and paraprofessionals.

You may also refer to:

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| EFCC01 | Coach client to monitor and maintain safe and correct fit of saddlery and lorinery |
| EFCC02 | Discuss fitting approach and likely outcomes, and make referrals |
| INSCS026 | Monitor and solve customer service problems |
| EFCGS02 | Set and communicate fees, prices, and terms of business |
| LANCS68 | Work within professional, legislative, and regulatory requirements for animal health and welfare |



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Performance Criteria

You must be able to:

- P01 Make appointments and collect necessary information
- P02 Plan and manage your diary
- P03 Operate efficiently so that you can be responsive when needed
- P04 Carry sufficient sales or demonstration stock, tools, and other supplies to carry out the service advertised
- P05 Communicate clearly and effectively in different mediums
- P06 Take and keep detailed and accurate records, including accounts
- P07 Monitor customer service and plan how to constantly improve
- P08 Comply with legislation, organisational policies, and codes of conduct and practice



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Knowledge and understanding

Undertake work within the scope and limits of your role and business

You need to know and understand

K01	The services and products you are trained, experienced, and able to competently deliver
Scope and range	<ul style="list-style-type: none"> • Vocational training • Product specific training • Experience, competence, and confidence
K02	Other constraints upon your business and customer service
Scope and range	<ul style="list-style-type: none"> • Procedures or policies <ul style="list-style-type: none"> ◦ Legislation or regulation ◦ Business policies and procedures ◦ Health, safety, and biosecurity • Whether you work alone or as part of a team • Products stocked and stock availability • Supplier agreements in place
K03	Relationships and agreements with other professionals and/or businesses
Scope and range	<ul style="list-style-type: none"> • Conditions of service laid down by your representative body • Formal or informal agreements with other Equine Fitters • Formal agreements with suppliers.

Collect and communicate information when taking an appointment booking

You need to know and understand

K04 The purpose of booking an appointment

Scope and range

- New, or returning client
- The reason for appointment



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- To purchase new equipment or to assess the fit of existing equipment
- The desired outcome for the client

K05 How to take and record all necessary information

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| Scope and range | <ul style="list-style-type: none"> ● Convey how you will accept bookings e.g., <ul style="list-style-type: none"> ○ Over the phone, via social media or email, or online form ● Have a procedure for processing bookings <ul style="list-style-type: none"> ○ How the information is stored securely yet accessible within the business where appropriate ● Refer to a guide or checklist ● Be able to quickly access existing records |
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K06 Which information must be taken or supplied prior to appointment

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| Scope and range | <ul style="list-style-type: none"> ● Horse and equestrian information, e.g., <ul style="list-style-type: none"> ○ Conformation ○ Level of fitness and ability ○ Current or relevant past issues ● Measurements, including photographs ● Other information, e.g., <ul style="list-style-type: none"> ○ Current and planned activities ○ Equipment currently in use ○ Issues for the horse or equestrian ● What equipment or stock is required |
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K07 How to negotiate and agree appointment objectives

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| Scope and range | <ul style="list-style-type: none"> ● Explain the appointment process ● Be clear if the needs of the booking party cannot be met, and explain why ● Explore and agree alternative or interim arrangements where appropriate |
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K08 Communicate fees and terms of service

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| Scope and range | <ul style="list-style-type: none"> ● Ensure fixed and variable fees and prices are shared and understood |
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		<ul style="list-style-type: none"> • Make available terms of service
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Operate efficiently to allow a responsive service when required

You need to know and understand

K09	How to manage your time	
Scope and range		<ul style="list-style-type: none"> • Area covered, and hours worked • When and how you will respond to contact outside an appointment • Develop an efficient travel plan • Maintain a work pattern with enough flexibility to accommodate short-notice calls • Ensure sufficient stock levels and have all necessary tools for each appointment
K10	When it is appropriate to respond rapidly	
Scope and range		<ul style="list-style-type: none"> • Urgent welfare or safety issue where it is within your responsibility and remit to assist • To put right an error or respond to change that could have been reasonably foreseen

Communicate effectively

You need to know and understand

K11	How to communicate clearly and effectively to manage expectations and provide the advertised service	
Scope and range		<ul style="list-style-type: none"> • Advertise services and products for sale or loan clearly and accurately • Set out clearly to your client: <ul style="list-style-type: none"> ◦ Likely outcomes of appointment or recommendations ◦ Appropriate budget and time scale required for optimum outcome ◦ Lead times for delivery of a product or follow up appointment • Explain what you need to complete an effective appointment: <ul style="list-style-type: none"> ◦ Safe, flat, well-lit area for static assessment ◦ Usual equestrian/s ◦ Safe, flat, well-lit area for worked assessment



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- Usual and/or intended equestrian/s in safe riding or driving attire
- Set out clearly to your suppliers:
 - Product specifications
 - Expected, or required, delivery date
 - Any issues, and your preferred resolution
- Set out clearly to your colleagues or other professionals (with client permission):
 - Work carried out, planned, or recommended to the client
 - How you prefer to work

K12 How to listen, empathise, and be respectful

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| Scope and range | <ul style="list-style-type: none"> ● Listen attentively and ask relevant questions ● Understand that the experience of others is different, as are communication styles <ul style="list-style-type: none"> ○ Seek to develop understanding ○ Withhold judgment ● Ask permission where appropriate ● Maintain confidentiality <ul style="list-style-type: none"> ○ What is shared with the client ○ What is shared with others about the client |
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K13 Maintain open communication

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| Scope and range | <ul style="list-style-type: none"> ● Advise the client in good time when you are unable to meet agreed service standards, and explain how you intend to rectify any failing ● Explain when and how the service or product may be varied and the associated cost ● Sensitively explain concerns about horse welfare and make referrals |
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K14 How to be assertive

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| Scope and range | <ul style="list-style-type: none"> ● Set boundaries and express needs and views ● Advocate for the interests of the horse, for other people, and for yourself ● Remain calm |
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K15 How to provide information in different formats



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Scope and range	<ul style="list-style-type: none"> • Keep detailed, accurate. and legible records • Ask, and check that you understand how your client would prefer to access information collected at each stage of an appointment e.g., <ul style="list-style-type: none"> ◦ Photograph or video ◦ Diagram or illustration ◦ Verbal explanation
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Customer Service standards and continued improvement

You need to know and understand

K16	How to deal with referrals and second or expert opinions
Scope and range	<ul style="list-style-type: none"> • Abide by rules set by your representative body • Where appropriate, comment only on what can be seen on the day
K17	How to measure performance and adapt your service
Scope and range	<ul style="list-style-type: none"> • Listen to and heed reasonable feedback • Check client satisfaction throughout the visit • Identify where improvements may be made, research best methods, and implement change • Identify and address skills gaps
K18	Why it is important to have and follow a complaints process
Scope and range	<ul style="list-style-type: none"> • Reflect local legislation and regulation, and any codes of conduct or practice issued by a representative body
K19	Consumer legislation
Scope and range	<ul style="list-style-type: none"> • How it applies to what and where you sell products or provide a service



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