

# **BSBCUS201**

# **Deliver a service to customers**

Release 1

**Learner guide**

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Aspire Version 1.1

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BSBCUS201 Deliver a service to customers Release 1

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Level 1, 464 St Kilda Road  
MELBOURNE VIC 3004 AUSTRALIA  
Phone: (03) 9820 1300

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## Contact details

<b>Participant</b>
Name:
Start date:
Phone number:
Email:
<b>Work location</b>
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
<b>Registered Training Organisation (RTO)</b>
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:



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# Before you begin

This learner guide is based on the unit of competency *BSBCUS201 Deliver a service to customers*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: [www.training.gov.au](http://www.training.gov.au).

## How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: <a href="http://www.aspirelr.com.au/help">www.aspirelr.com.au/help</a>
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.



## Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> <li>Understands requirements in organisational policy and procedure documents</li> <li>Interprets product and service information in a range of formats to provide customer advice</li> </ul>
Writing	<ul style="list-style-type: none"> <li>Records customer information according to organisational requirements</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>Provides information or advice using structure and language to suit the audience</li> <li>Asks questions and listens to gain information or confirm understanding</li> </ul>
Navigate the world of work	<ul style="list-style-type: none"> <li>Follows organisational procedures and practices relevant to own role</li> </ul>
Interact with others	<ul style="list-style-type: none"> <li>Uses accepted communication practices to establish connections, build rapport and develop professional working relationships</li> <li>Adjusts personal communication style in response to the opinions, values and particular needs of others</li> </ul>
Get the work done	<ul style="list-style-type: none"> <li>Addresses routine problems in familiar work contexts</li> <li>Recognises opportunities to enhance work practices and outcomes</li> </ul>

## What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Establish contact with customers	1A Acknowledge and greet the customer in an appropriate manner	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Maintain personal dress and presentation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Use appropriate interpersonal skills to communicate with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Maintain sensitivity to customer needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1E Establish rapport with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Identify customer needs	2A Determine customer needs by questioning and listening	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Assess customer needs for urgency	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Provide customers with information about available options	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Identify personal limitations in addressing customer needs and seeking assistance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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Topic	Key outcome	Rate your confidence in each section
Topic 3 Deliver a service to customers	3A Provide prompt customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Provide information regarding problems and delays	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Communicate with customers in an appropriate manner	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Identify opportunities to improve the quality of services and products	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4 Process customer feedback	4A Recognise customer feedback promptly and handle comments sensitively	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Record accurate feedback and communication between customers and the organisation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C Identify any unmet customer needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4D Assist customers to make contact with other services	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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# Topic 1

## Establish contact with customers

The quality of customer service provided by an organisation can make or break it. Good customer service is very important as it encourages customer loyalty, attracts repeat business and generates new business. Customer service standards are established by organisations to provide procedures and guidelines for employees when dealing with customers. The organisational image presented, the way employees communicate and treat customers, and their knowledge of products, services and the specific customer needs have an enormous effect on the success of an organisation.

In this topic you will learn how to:

- 1A Acknowledge and greet the customer in an appropriate manner
- 1B Maintain personal dress and presentation
- 1C Use appropriate interpersonal skills to communicate with customers
- 1D Maintain sensitivity to customer needs
- 1E Establish a rapport with the customer

# 1A

## Acknowledge and greet the customer in an appropriate manner

Customers are an organisation's most valuable asset. All employees have a role to play in building a professional relationship with their customers to ensure they remain loyal to the organisation. Communicating clearly and effectively with customers is the key to good customer relationships. Every time an employee interacts with a customer, they are contributing to the customer's impression of the organisation.



### The importance of good customer relations

As customers, we expect to receive prompt, friendly and professional service from someone who knows the organisation's products and services. To a large extent, the reputation of an organisation is based on the way employees treat members of the public and their own colleagues.

Various customer service studies have shown that when a customer is unhappy with a product or service, rather than making a formal complaint, they simply stop buying the product or service from that organisation. They also do something far more damaging – they tell their friends of their bad experience.

To ensure this does not happen in your organisation, you must be able to assess your customers' needs and know how your organisation can satisfy them. Customers come from a range of social, cultural and economic backgrounds. They have varying physical and mental abilities, and may display emotional behaviour. To foster good customer relations, you need to be able to deal with all the different kinds of people you come in contact with.

Quality customer service means:

- making your customers feel comfortable when they approach you
- listening to what customers are saying
- respecting customers
- helping customers get what they want.

## Who are your customers?

You have two groups of customers: external and internal.

All customers – external and internal – must be treated politely, promptly and pleasantly. You may be the first person to have contact with a new customer, so your communication skills and your knowledge of products and services will help form their first impression of the organisation.

Even if you do not have face-to-face contact with some customers, the work you do affects the standard of customer service the organisation provides. For example, you may prepare invoices, collate customer feedback forms or enter customer details into a database.

Below is some information about external and internal customers.

### External customers

External customers are the people outside the organisation who deal with your organisation in some way. They may be people who purchase your organisation's products or services, or potential customers who contact the organisation for information about products or services. Most organisations have a database of regular customers. They may be members of the public or they may be from another organisation. They may also be contacts from other organisations who need to share information or resources.

### Internal customers

Internal customers are the people who work in your organisation and who are employed to provide goods and services to your external customers. They are part of the customer-supplier chain. They may work in the same department or in a different department in your organisation. They may be located in another branch of the organisation, within the same state, interstate or overseas. These customers include your team members, other colleagues, your supervisor and your manager.

## Greet and acknowledge face-to-face customers

The first interaction between you and the customer is the greeting; this sets the tone for further communication.

Every customer – existing or potential, external or internal – should be greeted promptly in a professional welcoming manner. This initial communication must provide an acknowledgment to the customer that they, and their communication, are important.

Generally, customers give their name and say why they are visiting or calling the organisation. If a customer has an appointment, contact the appropriate person and either direct the customer to them, take the customer personally, or politely ask the customer to wait.

Here is an example of a face-to-face conversation with a customer.

Person 1 (customer): ‘Hello. My name is Roger and I’d like to speak to someone in the sales department.’

Person 2 (staff member): ‘Good morning, Roger. I can certainly help you with that. Please follow me to the sales department and I’ll introduce you to one of our helpful representatives.’

Person 1: ‘Thank you.’



## Example: greet a customer who has an appointment

Receptionist: Good morning. How can I help you?

Customer: Good morning. My name is Teresa Enright and I have an appointment to see the manager, Mr George Flag, at 10.00 am.

Receptionist: Certainly. He's expecting you. I'll just let him know you're here.

(Receptionist calls the manager)

He won't be long. Please take a seat.

In some cases, you may be required to shake a customer's hand on meeting them. Sometimes, though, it may not be appropriate to shake someone's hand. For example, a person's culture may not allow personal contact between men and women. If someone does not offer their hand, do not be offended.

If you know the customer's name, use their correct title (Mr, Ms, Dr, etc.); for example, 'Good morning, Mr Petros. Thank you for coming.'

Follow any other organisational procedures your company has in place. For example, you may be expected to offer customers a cup of coffee if they have to wait until they can see someone.



## Tips for greeting customers

When you have worked in an organisation for a while, you become familiar with customers who regularly visit or call. Present a positive image of your organisation by greeting them by name. Be familiar with personal visitors, such as a spouse or partner of your colleagues, and know the procedures for dealing with them.

The most important thing in customer service is to present a professional image. Even when you are unsure of what you are supposed to do, try not to let the customer know. Simply ask them to wait and ask someone in the organisation to help you.

Your organisation's customer service policies outline how you are expected to behave. This may include asking a customer to wait in a reception area, taking a customer to another staff member, dealing with difficult customers or handling confidential information.

When greeting a customer:

- be courteous
- smile at the customer and make eye contact
- treat the customer in a professional manner
- use a friendly tone
- use the customer's name and title if known
- be willing to help.

## **Greet and acknowledge a customer over the phone**

Organisations usually have a policy for answering incoming telephone calls. This may include requirements such as answering the phone within three rings and using a particular greeting.

When answering the phone, you may be the first contact a customer has with your organisation, so the initial greeting is very important. Being cheerful and courteous is essential.

Most organisations require people to include the following when answering the phone:

- a polite greeting, such as 'Good morning'
- the name of the organisation; for example, 'Ashburton Crash Repairs'
- your name; for example, 'This is Josh speaking'
- an offer of help; for example, 'How can I help you?'

Here are some tips for talking with customers over the phone.

### **Be clear and polite**

Answer the phone clearly and be polite to the caller. A polite, helpful tone is very important. Because the customer cannot see your face, your voice must convey expression. Tip: if you smile while you are talking, your voice sounds cheerful.

### **Be prepared**

Be prepared for all situations. Some people may not speak English well or may have a hearing or learning difficulty. Some callers may be angry and wish to complain about something. Others may be calling your organisation for the first time.

### **Be apologetic**

Sometimes all the available telephone lines may be busy and you cannot connect the customer to the person they wish to speak to. Apologise and suggest they could either wait until the person has finished their call or leave a message for the person to call them back.

### **Be courteous**

Always ask callers whether they mind you putting them on hold while you connect them to another staff member. Some people may not have the time to wait or may prefer to call back at a time that suits them. When you are transferring a call, tell the caller the name of the person you are transferring them to.

### **Be personal**

Many people do not like being greeted by recorded instructions. If your organisation uses this method of initial contact, it is even more important to sound helpful when the customer eventually gets to speak to you.

## Use your voice

The way you say something can be as important as the words you actually use. The tone of your voice, the speed at which you speak and the volume and pitch of your voice all affect the impression you make on your customer.

When talking with customers, use a positive language and tone of voice. By the end of the day, you may be tired and may not feel enthusiastic or patient. However, maintain your professionalism and remain positive.

Below are some examples of positive phrases to use and negative phrases to avoid when talking with customers.

Positive phrases	Negative phrases
<ul style="list-style-type: none"><li>• 'Yes, I can certainly do that for you.'</li><li>• 'I'm sure I can arrange that. Just a moment and I'll find out for you.'</li></ul>	<ul style="list-style-type: none"><li>• 'We can't do that.'</li><li>• 'I'm not sure about that.'</li></ul>

## Refer customers

If you need to refer a customer, always tell them what you are doing. For example, 'Mr Singh, please hold for a moment while I obtain the number for you'.

If the person the customer wishes to see is unavailable, explain the situation to the customer and then suggest another person who may be able to assist.



## Organisational service standards

Your organisation will have a number of ways in which it makes clear how it wants you to deal with customers.

An organisation's customer service standards are set by its vision or mission statement, from which the organisation's goals and objectives evolve. The mission and vision statement usually includes a statement about how customers are perceived. A business plan arises from the vision and mission statements and includes information about how the needs of customers are to be met.



## Organisational policies and procedures

Organisations exist to meet the needs of customers. Organisations that understand this are customer-driven. Operational procedures arise from the vision or mission statements and they guide the organisation. The procedures outline how employees are to conduct business, including how to deal with customers.

Induction programs usually include the procedures for dealing with customers. The policies and procedures are generally documented in a manual and made available as a paper-based booklet, an electronic file or on an intranet. Your organisation may also have a customer service strategy or a customer service charter, which you need to be familiar with.

It is your responsibility to comply with the organisation's policies and procedures. Make sure you understand what you have to do and know the reason for the procedures. Always ask an experienced colleague or refer to your supervisor/manager if you are not sure. Taking responsibility to understand your duties and follow correct procedures is essential for all people working in customer service.

Organisational guidelines, policies and procedures may include:

- instructions about answering the telephone
- using company letterhead for all correspondence
- providing refunds
- dealing with complaints
- access and equity principles and policies
- work health and safety (WHS) procedures
- customer service principles and guidelines
- legal requirements
- continuous-improvement processes
- quality-assurance principles and procedures
- anti-discrimination and related policies

## Legislative requirements

All organisations must comply with legislation relating to equal opportunity, anti-discrimination, privacy and work health and safety. The legislation has been written to ensure people, including customers, are treated fairly and equally and that any information they give to an organisation is treated as confidential. Ignoring these policies could have serious legal consequences for an organisation.

Legislation requires you to show courtesy to all customers and serve them in the order they have been waiting. You should always offer assistance to those with a disability, be patient and use clear communication skills, and be sensitive to other peoples' cultures.

Important legislation includes:

- *Work Health and Safety Act 2011* (Cth)  
[www.comlaw.gov.au/Details/C2014C00471](http://www.comlaw.gov.au/Details/C2014C00471)
- *Racial Discrimination Act 1975* (Cth)  
[www.comlaw.gov.au/Details/C2014C00014](http://www.comlaw.gov.au/Details/C2014C00014)
- *Age Discrimination Act 2004* (Cth)  
[www.comlaw.gov.au/Details/C2014C00435](http://www.comlaw.gov.au/Details/C2014C00435)
- *Disability Discrimination Act 1992* (Cth)  
[www.comlaw.gov.au/Details/C2014C00013](http://www.comlaw.gov.au/Details/C2014C00013)
- *Sex Discrimination Act 1984* (Cth)  
[www.comlaw.gov.au/Details/C2014C00002](http://www.comlaw.gov.au/Details/C2014C00002)
- *Privacy Act 1988* (Cth)  
[www.comlaw.gov.au/Details/C2014C00757](http://www.comlaw.gov.au/Details/C2014C00757)
- *Human Rights and Equal Opportunity Commission Act 1986* (Cth)  
[www.comlaw.gov.au/Details/C2004C00982](http://www.comlaw.gov.au/Details/C2004C00982)
- State and territory government laws.

## Consumer protection

There are also laws and regulations that protect consumers from a variety of unscrupulous business practices. The Australian Consumer Laws are contained in the *Competition and Consumer Act 2010* (CCA) (previously known as the *Trade Practices Act 1974* (Cth)), which exists to 'enhance the welfare of Australians through the promotion of competition and fair trading and provision for consumer protection'. This Act can be accessed at: [www.comlaw.gov.au/Details/C2014C00727](http://www.comlaw.gov.au/Details/C2014C00727). Core competition law provisions are contained in Part IV of the CCA, including restrictive trade practices, price monitoring and disclosure, and false or misleading representations.

The federal, state and territory governments also have regulating bodies to help Australians become responsible and informed businesses and consumers.

If you are dealing with the public, you should be aware of the requirements for being open and honest, and for not misleading customers by what you say or even what you do not say.

Below are some examples of open and honest customer communication.

### Open and honest customer communication

Clearly explain to customers the organisation's policies on refunds and replacements before they make their purchase.

Always provide accurate information about a product or service, especially in relation to the price and any conditions during a sale such as 'no returns on sale items'.

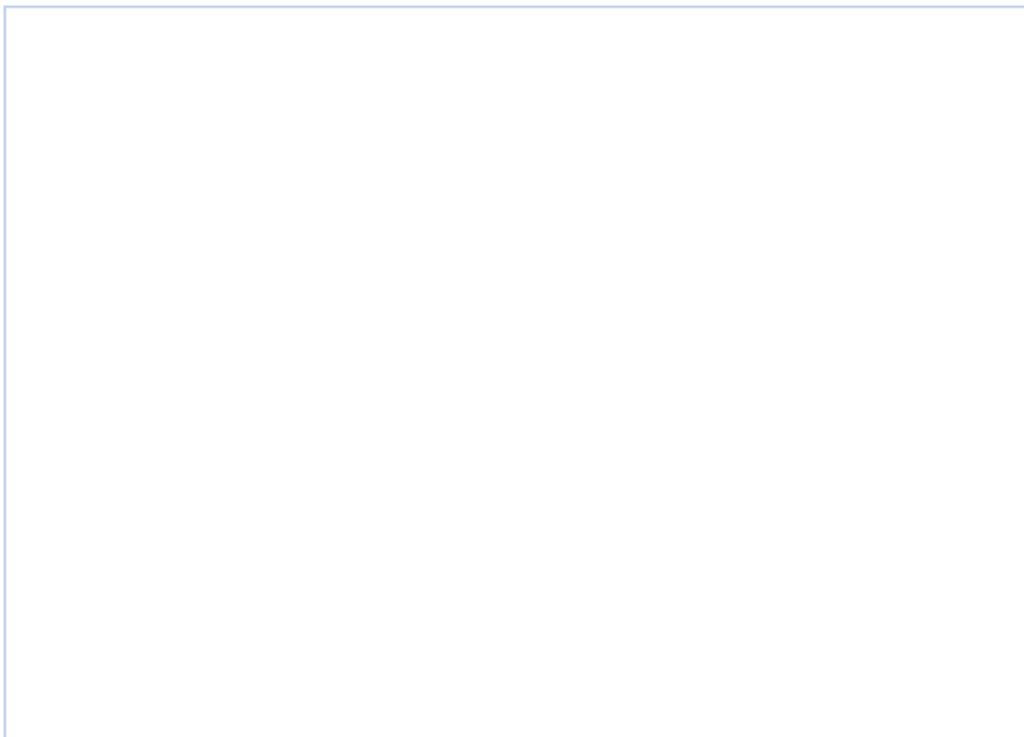
Explain customer details are only used for the purpose stated.

## Practice task 1

1. Describe a time when you were a customer and received unsatisfactory service. What occurred to make this a bad experience? How did it make you feel? What did you decide to do after this experience?



2. Describe a time when you were a customer and received good service. What occurred to make this a good experience? How did it make you feel? What did you do after this experience?



# 1B

## Maintain personal dress and presentation

Employers expect their employees to be presentable and to maintain an acceptable standard of professional appearance. Acceptable means being neat and clean, in both personal hygiene and dress style.

The way you dress depends on the type of business your organisation operates in and the customers it deals with. For example, some organisations require you to wear a uniform and some have strict rules that discourage staff from wearing piercings or unusual clothes. Other organisations are more informal and are happy as long as staff are neatly dressed.

Standards of presentation may be documented in a policies and procedures manual under 'dress code'. This code describes the minimum level of presentation required. Some organisations may not have a written dress code, but expect you to know what the dress standards are. Before starting any job, make sure you know the organisation's requirements.



### Project a good image

Every time you speak to a customer, talk with your supervisor, attend a meeting or conference, or deal with a supplier, you present an image of yourself and your organisation. As an employee, it is your job to always present yourself in the best possible way.

An image is the picture or impression that first springs to mind when something is mentioned. The image you have of a person can sometimes turn out to be wrong. For example, the clothes a person wears may help you form a particular judgment of them that is, in fact, inaccurate. Organisations often do not get a second chance. The first impression you have of an organisation is what is likely to remain with you. The ways staff dress, behave, speak and deal with their customers contribute to how customers view the organisation. For this reason, all organisations expect their staff to maintain high standards of presentation and communication with their customers.

Below are some different types of working clothes.

#### **Corporate dress**



Corporate dress, such as a suit and good shoes, may be required for company executives, sales representatives or others having direct contact with customers.

#### **Business casual**



Some small businesses may adopt a business-casual dress code, allowing employees to dress neatly but casually in jeans and comfortable shoes.

#### **Uniforms**



Uniforms displaying the organisation's logo may be required in service-based businesses, limiting employees' choices for work attire.

### Protective clothing



Protective clothing or safety garments are required when working in an organisation where the dress code is legislated for safe work practices.

### Casual clothes day



Organisations may allow employees to wear casual clothes one day per week, such as 'casual Friday', or during special occasions.

## Example: how not to deal with a customer

A customer, Mr Braithwaite, approached the reception area of a large business enterprise. The receptionist was playing with her phone and continued for a few minutes until Mr Braithwaite coughed to get her attention. He noticed that she was eating a doughnut.

'Yes?' she said. He told the receptionist his name and that he had an appointment at 10.00 am with the Finance Manager, Ms Appleton.

'Umm, let's see. Oh, you're early,' she sighed. 'You'll just have to wait'. She continued playing with her phone.



## Practice task 2

1. Describe a situation when someone's appearance affected your view of their organisation, product or service.

2. How did this alter your thinking and why?

# 1C

## Use appropriate interpersonal skills to communicate with customers

Interpersonal skills help us communicate and work with people to achieve the desired results. They refer to a person's ability to operate through social communication and interactions.

Effective interpersonal skills make it easier to establish relationships and work well with others. To achieve this, we need to practise self-awareness. If we understand our own values, beliefs and viewpoints, we can better empathise with and understand others. This allows us to communicate better with others.

When communicating with a customer, it is vital that you are clear about what the customer wants or is requesting. Your understanding of their needs should be accurate – you need to get it right. Appropriate and relevant interpersonal skills are the key to ensuring accuracy of understanding based on a relationship of respect and awareness of their needs as both a person and a customer.



## Build meaningful relationships

Using interpersonal skills leads to meaningful relationships with customers and assists you to meet their needs.

Make interpersonal skills an integral part of everything you say and do. It is important that you are aware of the importance of these skills and aim to consciously develop them over time. Thinking about how you interact with friends, about your previous work experiences and about how other people interact helps you develop your own interpersonal skills.

Below are some ideas about building meaningful relationships.



### Be clear

- Use clear communication techniques such as active listening and appropriate questioning, summarising and rephrasing to ensure understanding.



### Be honest

- Display integrity by being honest and following ethical values and principles.



### Be respectful

- Identify and respect the needs of others and be aware of people's feelings.

## Active listening

Listening carefully to what your customer is saying is probably the most important part of dealing with customer inquiries. The ability to listen properly is often referred to as 'active listening' because it requires you to concentrate on what the speaker is saying. By listening carefully, you can ask the right questions or handle a phone call efficiently. Active listening ensures you understand what the customer is saying and minimises misunderstanding.

If you do not listen actively, you may hear only part of what the person is saying, hear the information incorrectly or assume you know what they are going to say and interrupt.

To ensure you are an active listener, apply the following tips.

### Show you are listening

When speaking face-to-face, the customer can see whether they have been understood by the way you respond; for example, with a nod or a smile. On the telephone, let the customer know they are being understood by saying things such as 'yes', 'I agree' and 'of course'. These are often referred to as verbal nods. Ask relevant questions when appropriate to show you understand what they are talking about.

### Summarise what has been said

A good technique to adopt when listening to a customer is to summarise what they have just said and repeat it back to them. This technique, sometimes known as paraphrasing, reassures the customer they are being listened to. Asking for feedback to confirm your understanding of their needs is also a good approach.

### Don't interrupt

Because people think faster than they speak, it is easy to rush in with a response before the other person has finished speaking. It can be tempting to assume you know what the customer is going to say and complete their sentence for them. But interrupting gives the impression that what they are saying doesn't interest you.

*continued ...*

... continued

### Take notes

You may find it difficult to remember everything a customer says, especially if the conversation is long. Always record the important aspects of a conversation and the action you will take.

A conversation can be recorded on:

- your computer
- a message pad
- an information request form
- a complaints form.

A record of a conversation is useful if a customer makes a complaint. Sometimes a record of a conversation is used for legal purposes.

### Use appropriate body language

When talking with a customer face-to-face, the way you sit and the gestures you make signal how you are feeling. For example, smiling, leaning forward, frowning or looking bored all reveal how a conversation is going.

The following body language shows customers you are interested in them:

- greeting them with a friendly smile
- making eye contact while they are talking
- nodding to let them know you are listening
- sitting in a comfortable and relaxed position, and also leaning forward slightly, to convey a positive, welcoming manner.

You should also take notice of your customer's body language. They may have an angry look if they are complaining about something. They may look puzzled, showing they don't understand what you're saying.

## Ask questions

Sometimes the customer is not able to explain exactly what they want. Ask them specific questions so you can provide the right information. This helps you identify the customer's need.

There are two kinds of questions: closed questions and open questions. Closed questions can be answered with just 'yes' or 'no', or another single-word response. Open questions help you find out more why the customer is there. You can follow this up by asking more questions until you have clearly identified what the customer needs.

Often a customer will ask an apparently straightforward question. However, by carefully questioning the customer, you may find the real need is for something quite different or more information is needed. For example, a customer may ask you where the sales department is. If you ask them about who they want or why they are looking for the sales department, you may find they actually need to be talking to the complaints department.

You can learn more about open and closed questions below.

Open questions	Closed questions
Use open questions when you want to find out more information. These questions begin with the words 'how', 'why', 'where', 'what', 'when' or 'who'. They cannot be answered with just 'yes' or 'no'. An example is, 'What type of kettle are you looking for?' By asking the customer a variety of open questions, you can ensure you understand what they are asking for and suggest what they actually need.	Use closed questions when you want a simple answer to a specific question such as, 'Would you like the delivery on Wednesday?' or 'Do you want the small model?'

## Summarise

Another technique to help you clarify the needs of a customer is to summarise within the conversation what you believe they are requesting or asking of you.

For example, at an appropriate point in a conversation you could say, 'To clarify my understanding of your request, Mr Stone, you are asking us to have a service call at your premises next Wednesday 2 May, instead of this coming Thursday. Is my understanding correct?'

The summarising technique:

- keeps you focused on the conversation
- makes sure you have understood what the customer needs
- gives the customer an opportunity to correct any misunderstanding
- shows the customer you are listening and taking an interest.

## Rephrase

Rephrasing is another way of making sure you understand what your customer is asking. It means putting what you think the customer is saying into your own words. You can keep doing this until you are both satisfied that you understand each other.

However, when thinking about questions you could ask, remember this – do not rush in before the customer has finished what they want to say. People can get very annoyed if they are interrupted.

Below are some examples of rephrasing.

### Examples of rephrasing

‘So you would like me to book your car in for a service on 3 May at 10.30 am. Is that correct?’

‘I’ll just repeat what you’ve said, so I know I’ve understood correctly. You’re happy for us to send you what we’ve got now and let you know when the rest comes in?’

## Integrity and respect

If people feel you are being dishonest or less than honest with them, they will soon decide to take their business elsewhere. Trust is essential. If people think you lack integrity, they will assume the whole organisation does too; otherwise you would have been dealt with by your supervisor.

Respect for others is a basic interpersonal skill and there are times when you need to be sensitive to the particular needs of your customers.

You should be open and honest. This may put you in some difficult situations if your organisation as a whole does not work this way and may cause you to compromise your values.

A lack of integrity can be displayed by:

- trying to force a customer to take a product or service they clearly don’t want, just because you need to sell more of it
- pretending a product or service does things it does not do
- promising things you know you cannot deliver
- doing things that are not in the best interests of a customer.

## Practice task 3

1. What could happen if you think you know what a customer wants, but do not listen carefully to ensure you have heard them correctly?

2. Do you interrupt people? If so, what could you do to ensure this does not happen in the future?

3. Why should you wait for a customer to finish what they want to say before you ask a question?

# 1D

## Maintain sensitivity to customer needs

During your work, you will meet people with different interests, backgrounds, cultures and experiences. You may deal with customers who do not speak English very well. Some customers may be angry, aggressive or annoyed. Some may have a disability. It is important that you maintain sensitivity to the specific needs of your customers, to ensure their experience with your organisation is satisfactory.



### Individual differences

When speaking with customers with special needs, we need to take their physical disabilities into account. Speak up or speak more clearly if someone has a hearing impairment, or make an effort to be at the same height level of a person in a wheelchair. Do not pretend to understand if you don't, just politely ask people to repeat what they have said. Do not act in a condescending manner.

Here are some other ways to take individual differences into account.

### **Display intercultural understanding**

It is useful to know the correct way of dealing with people from different cultures. For example, customers have different attitudes to eye contact and body language. Intercultural communication focuses on understanding language expressions, body language, social behaviour, speech patterns and contact between men and women, which all differ according to people's cultural backgrounds. For example, in some cultures men do not shake hands with women. Show sensitivity to such cultural differences.

### **Be sensitive to personal needs**

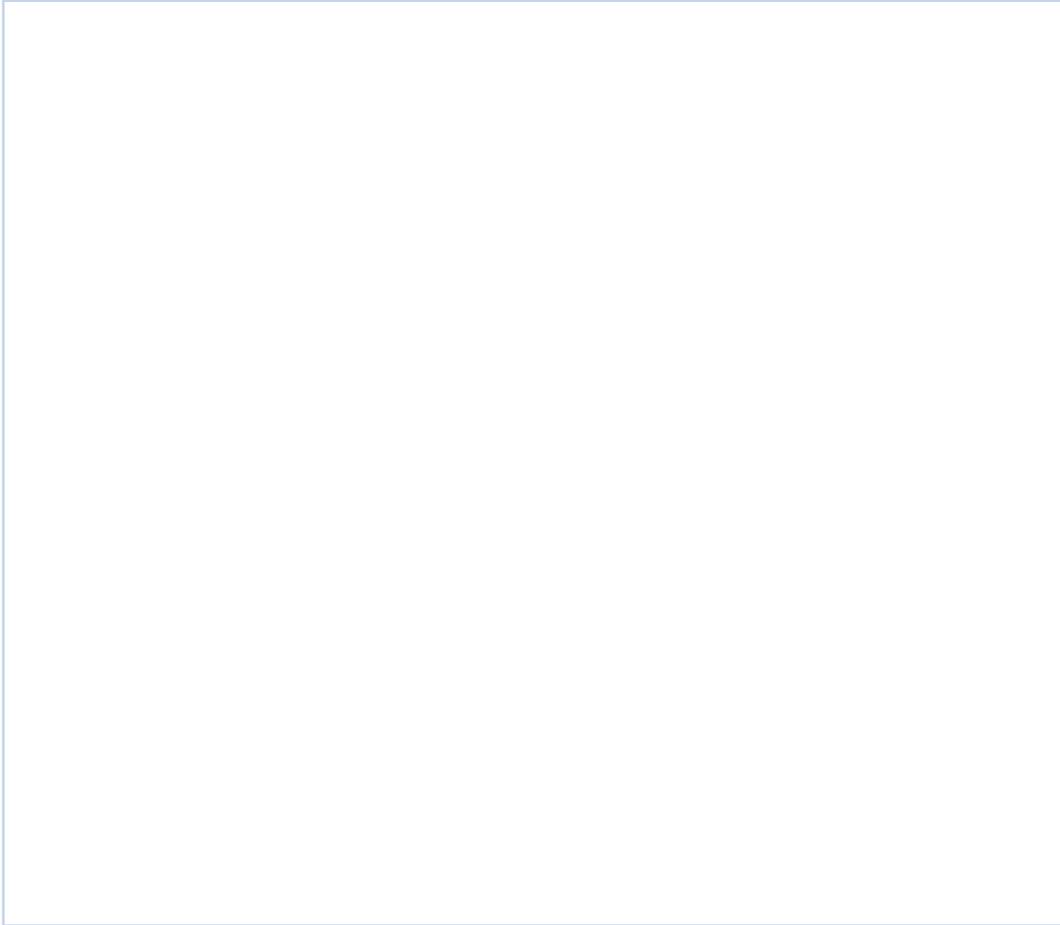
You must also be sensitive to people's personal needs. They may have tastes that are very different from yours or may have personal or family problems that are distracting them. A customer may be embarrassed about their personal circumstances, their appearance or a disability. In all such cases, show sensitivity to and respect for the person.

### **Show empathy**

Show empathy in all situations where a customer is having difficulty or is upset. Empathy is the ability to identify with and understand someone else's situation. Your organisation may employ certain people to deal especially with these customers or phone calls, although initially you may need to deal with them yourself. Never enter into an argument. Customers may be angry; for example, when lodging a complaint. Stay calm and polite. Do not get impatient. If the customer just wants to talk, ask questions to help steer the conversation back to the topic.

## Practice task 4

Research a culture that differs from your own and list some of the cultural differences that may affect your ability to establish positive contact with customers.



# 1E

## Establish rapport with customers

Rapport is a relationship of mutual understanding or trust and agreement between people. All customers need to feel they are dealing with someone who understands their needs and whom they can trust.

To understand a customer's needs, you need to make them feel you are working with them, not against them, to meet their needs or solve a problem. Show empathy; that is, place yourself in the customer's position. One way of doing this is to say things like, 'I understand you must feel very angry about that' or 'That must have been very annoying for you'. Listening carefully and showing empathy helps build rapport.

But how can you show empathy when you are busy, tired or bored, or are approached by a customer who is angry or needs extra assistance? One way to cope is to take a deep breath and calm down before speaking. Learn to smile, no matter how you are feeling. It may not be easy, but it is a skill you need to acquire.



### Use interpersonal skills to build rapport

Exercise your interpersonal skills and use them to identify the customer's psychological needs and their real problems and real needs.

Customers have a psychological need to feel:

- welcome
- important
- understood
- comfortable.

## Tips to build rapport

Building a good relationship with a customer also means doing a bit extra for them. Once you have established a good rapport with a customer, you can build on this by maintaining communication with them.

### Tips for building good rapport with customers

Let the customer know that they can always contact you personally whenever they need information.

Telephone customers to let them know some information; for example, that a special or a new product has just come in.

Make sure a customer request is handled properly.

Follow up any queries to make sure the customer has been satisfied. For example, if you referred the customer to a colleague, check that the issue was resolved.

Make a note of the customer's personal information, such as whether they are married. Include this in your conversations.



## Practice task 5

1. Did it make you feel welcome? If so, how?

2. Did it make you feel important? If so, how?

3. Did it make you feel understood? If so, how?

4. Did it make you feel comfortable? If so, how?

5. Suggest improvements that could be made by the organisation if any of these psychological needs were not met.

## Summary

1. All employees have a role to play in building professional relationships with their customers to ensure they remain loyal to the organisation.
2. The needs of both internal and external customers must be met.
3. Organisations provide guidelines about how they expect you to communicate with customers.
4. The vision and mission statement of an organisation outlines the values and principles on which the customer service standards, policies and procedures are based.
5. Your interpersonal skills are essential to communicating appropriately and effectively with customers.
6. You should identify the needs of customers while taking account of their cultural, family and individual differences.
7. To understand the customer's needs, you need to make them feel you are working with them, not against them.

## Learning checkpoint 1 Establish contact with customers

This learning checkpoint allows you to review your skills and knowledge required to establish contact with customers.

### Part A

1. Identify and briefly describe key provisions of the *Competition and Consumer Act 2010 (CCA)* that apply to customer services.

2. Why is it important to establish a good relationship (rapport) with customers?

3. Describe four ways you could establish professional and courteous relationships with customers.

4. What guidance do you expect from your organisation about communicating with customers?

5. What could happen if an organisation had no procedures or guidelines for dealing with customers and just left it up to each employee to 'be pleasant to all customers'?

6. Legislative requirements about providing accurate information are included in an organisation's policies and procedures for dealing with customers. Explain what could happen if you forgot to tell a customer they would not be able to return any sale items and there would be no refunds.

7. List the things you could do to present a professional image with your personal appearance.

8. Describe your organisation's dress code. If there isn't one, describe the type of clothes employees wear. If you are not in the workforce, describe the type of clothes worn in an organisation of your choice.

## Part B

Read the case studies, then answer the questions that follow.

### Case study

A customer reported this experience to a friend.

'I went to buy a digital camera yesterday. The shop assistants were busy talking among themselves and took no notice of me. When I finally got one man's attention, he curtly asked what I wanted, then showed me a camera for \$1000 – much more than I wanted to spend. He seemed annoyed I wasn't going to be a big spender. Then he mumbled away about things called pixels, megabytes, images and memory cards. I had no idea what he was talking about. When I asked for an explanation, he looked at me as if I was stupid. So I just left the shop.'

1. List at least six communication rules the shop assistant broke.

2. If you were the shop assistant, what would you have asked the customer?

3. What would you have done to make this a good experience for the customer?

### **Case study**

At a local real estate agent's office, Alan is behind the customer service counter. He is dealing with a difficult inquiry on the telephone when a customer approaches the counter. Alan keeps talking on the phone and when the customer says, 'Excuse me', he does not look up but holds up a hand, indicating he'll be with them in a minute.

4. Imagine you are Alan's supervisor. Describe what you would say to him about body language and managing his responsibilities for greeting customers on the telephone and face-to-face.

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## Topic 2

# Identify customer needs

To provide good customer service, you need to clearly identify what the customer needs and how urgent their need is. To do this, you should have a good knowledge of your organisation's products and services and the information available about them. You also need to understand the policies and procedures of the organisation. You should know, or be able to find out, who is responsible for the services and products offered by your organisation.

In this topic you will learn how to:

- 2A Determine customer needs by questioning and listening
- 2B Assess customer needs for urgency
- 2C Provide customers with information about available options
- 2D Identify personal limitations in addressing customer needs and seeking assistance

## 2A

## Determine customer needs by questioning and listening

Active listening and questioning are vital skills when communicating with customers. These skills assist in identifying the needs of the customer, so you can provide accurate and relevant information. Active listening and questioning are revisited in this section with a focus on using them to identify the needs of the customer.



### Customer contact

The way contact is initiated by a customer may influence the organisation's reply. Customers may contact an organisation by telephone, in person, by letter, by fax or memo, or by email. They may also make online enquiries or use social media.

Internal customers may need advice or information regularly. For example, another department may want you to send a copy of monthly sales figures at the end of each month or an interstate branch may want you to email the minutes of monthly meetings. A department may ask you to send a copy of a particular report or want copies of every report your area publishes.

People contact an organisation for various reasons. It is a good idea to be familiar with the most frequently asked questions or requests for information the organisation receives.

People may contact an organisation to:

- find out about opening hours
- arrange an appointment with someone in the organisation
- find out about the availability of products or services
- return a product
- find out who they should speak to about a problem
- find out about special products or services the organisation offers
- ask about special offers such as discounts
- make a complaint.

## Use questioning and active listening

When receiving a request, listen carefully so as to understand exactly what is being asked. Identifying what the customer needs is an important skill. Often a customer asks for information and this seems like a straightforward request. However, by asking questions it may become apparent that the customer really wants something different or they need more information.

If the customer has written, faxed or emailed your organisation, you may need to telephone them to clarify exactly what they want.

Ask yourself questions like these to establish what the customer wants.

What does the customer want?
Is the customer asking for general information about the organisation?
Does the customer want information sent to them?
Does the customer need information about discounts, or a new product or service?
Does the customer need to speak to someone in another department?
Does the customer need promotional material?

## Good questioning techniques

Ask questions to find out precisely what the customer wants. A customer may not know what is available from the organisation and so may ask for more details about products or services. Explain to the customer what information is available and what can be sent to them. Sometimes a customer may ask you to send them information about a specific product without knowing there are other products and services that may better suit their needs or that an improved service at the same price is now available.

Ask questions if the customer has not provided information. For example, your supervisor may have asked you for your industry's latest employment figures, which your organisation keeps on a central database. The database has a range of employment figures divided into gender, age, type of work, weekly and monthly breakdowns, etc. In this case, you would have to ask questions to find out exactly what figures your supervisor needs.

Good questioning techniques include:

- asking a variety of questions to find out the customer's situation and what they need
- paraphrasing what the customer has said
- clarifying information by asking more questions
- summarising what both you and the customer have said.

### Example: telephone inquiry and response

Service person: Hi, Simm Shoes.

Customer: Could you please send me any information you have about your sports shoes?

Service person: Certainly. We've got a general brochure about all the sports shoes we stock.

Customer: Can you email a copy to me?

Service person: I certainly can. Are you interested in a particular type or brand?

Customer: Well, I was interested in those new Cobra basketball shoes I saw advertised.

Service person: They're actually on special at the moment and we've got all sizes in stock.

Customer: When does the special finish?

Service person: It finishes tomorrow so you might want to come in

Customer: At what time do you close?

Service person: We're open until 9.30.

Customer: All right. That sounds great. I'll try to come tonight.



## The Eight Ps

You should aim to provide the customer with exactly what they want. If you are working in an industry sector that sells products, you may find it useful to refer to what is called the 'Eight Ps' list to establish what product or service a customer wants.

## The Eight Ps

1

### Picture

What does the customer have in mind?

2

### Purpose

What do they want it for?

3

### Person

Who is it for?

4

### Past

Has the customer bought a similar product or used a similar service before?

5

### Problem

Were there any problems with a previous purchase?

6

### Place

Where will they use the product?

7

### Price

How much do they want to spend?

8

### Particulars

What details, such as colour, shape, size or brand, do they want?

## Identify customer motivation

Good communication should result in you finding out what the customer needs. It is also useful to find out why they want the information, product or service – what is their motivation? When you know this, you can often match your organisation's products or services more easily to what the customer wants. There are two main kinds of motivation: rational and emotional.

### Rational motivation

Rational motives include concerns about whether the product is suitable, convenient, durable, reliable, versatile, economic, and performs well.

### Emotional motivation

Emotional motives include concerns about whether the product is attractive or novel, whether it shows status and prestige, increases comfort, and imitates what is popular or fashionable.

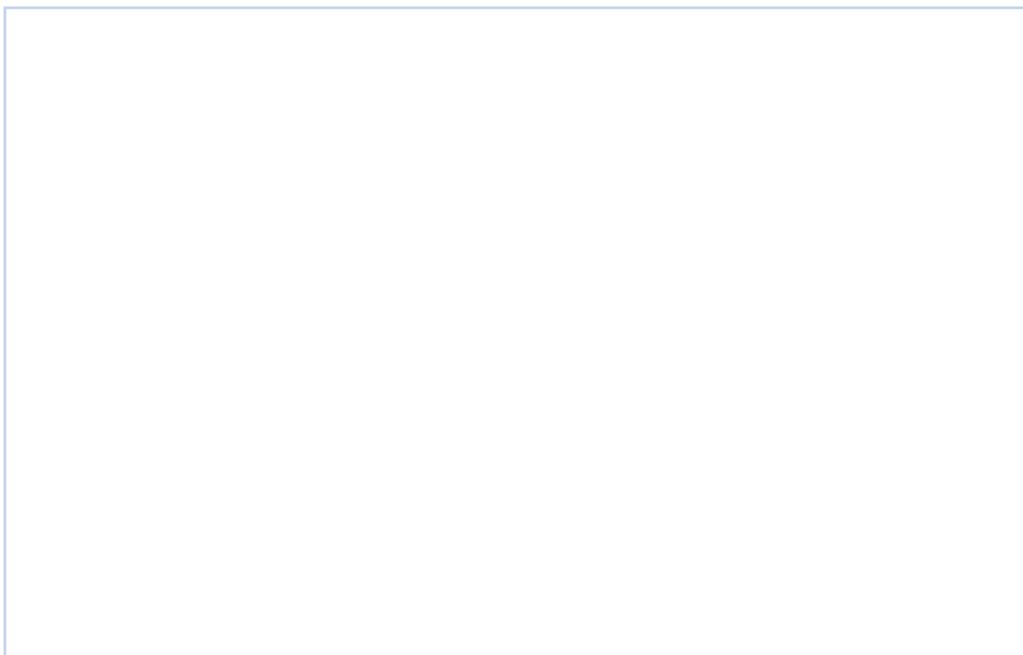


## Practice task 6

1. Think about an appointment or a booking you have made recently on the telephone with a dentist, doctor, trainer, vet, hotel, travel agency or other organisation. Did the person handling your call ask useful questions? Explain your answer.



2. Ask a friend, colleague or family member about a purchase they intend to make and write a brief description of this purchase. Then record their answers to the Eight P questions in relation to their intended purchase. Explain how you now have a better idea of what they want.



## 2B

### Assess customer needs for urgency

The urgency and sensitivity of a customer request will vary. The need for a repair can range from extremely urgent, such as a threat to someone's health and safety or critical adverse economic effects like loss of production or revenue, through to non-critical cases where there is no real need for urgency.



### Provide information immediately

On many occasions, customers can be satisfied immediately by giving them the relevant information. Keep handy a list of frequently asked questions (with answers) so a prompt reply can be given. Accessing a database is another quick way of providing information.

Even if the request for information sounds straightforward, remember to ask questions and be prepared to provide as much information as possible. For example, the customer may have asked about the price of a product, but you may need to explain there has been a recent price increase, the product is temporarily unavailable or there are specials and discounts being offered.

Frequently asked questions include requests for information about:

- opening hours
- product prices
- name of the person a customer should speak to
- how to make an appointment
- the availability of a product or service
- delivery times.

## Assess the urgency of a request

Some requests are urgent; for example, a customer requires immediate delivery of a product or wants to make a complaint. Perhaps a customer needs some information straight away. If so, collect the appropriate material and mail or fax it to them as soon as you can.

If the customer is a colleague, you can send material through the organisation's internal mail system or deliver it personally. Otherwise, prioritise the request. There are many ways you can assess the urgency of a need.

Below are some ways to assess the urgency of a request.

### Ways to assess the urgency of a request

- Write the requests in your daily work plan and remember to follow them up.
- Develop a form that records the customer's needs and requests.
- Create an urgency rating scale of 1–5, with 5 being the most urgent need.

### Example: assess the urgency of a customer request

AAA Electronics is a company that repairs electronic and other equipment. It has developed a form to assist in assessing the urgency of customer requests. This uses a rating of 1–5, with 5 being the most urgent need.

**Week beginning: 2 May**

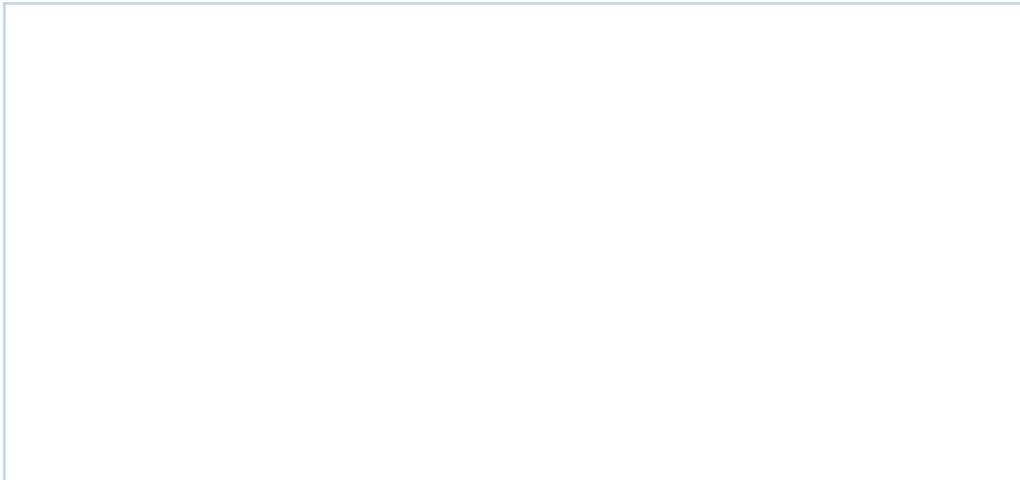
Customer	Need	Urgency	Date called	Date returned to customer
Solver Industries (John Grey)	DVD recorder does not operate – DVD will not release. Needs machines for presentation on 4 May.	4	2 May	3 May
Sue Shaw	Remote control needs repairing.	1	2 May	6 May
Harry Figg	Television requires a new part. Has a second television at home.	2	3 May	6 May
Susan Clothing Pty Ltd	Information on setting up boardroom with electronic equipment and wants a site visit. Looking at completion of work in four weeks.	1	4 May	9 May

## Practice task 7

1. A customer phones your organisation and asks for information on the current prices of some of your products. You know the price list is six months old and prices are going to increase in two weeks' time. List the actions you could take.



2. A customer visits your organisation to ask for information about a specific insurance policy. You can give some basic information, but the colleague who knows the details is away on holiday. An information brochure has been sent for printing and is expected to be ready the following week. List the actions you could take.



## 2C

### Provide customers with information about available options

Your communication skills are important when dealing with customers who are unsure what information they require. Often customers request one specific piece of information but after questioning them as to their need, you ascertain quickly that there are other products or services that also suit them.



### Provide information

Organisations have different methods and procedures for providing requested information to customers. For example, an organisation may have certain material that can be sent to anyone who asks for general information. It may have rules for sending urgent information to a customer. Certain inquiries may only be handled by a particular department. Generally, material that is mailed to customers has a 'With compliments' slip attached and is signed by the appropriate person.

Be familiar with all the correct procedures for providing information to customers. Understand what information can be passed on and the best way to get the information to customers.

Information may be provided to customers:

- over the telephone
- through the mail
- via email
- via fax
- in person.

## Provide options

Sometimes a customer requires a range of options or suggestions. Use your knowledge of your organisation's products and services to help them become familiar with the range available, the products and services currently on special offer, and when new products and services are being released.

Describe the various options available and what each option means. For example, a new product may have just been introduced that is better, but more expensive, than the current product. Therefore, before suggesting the newer, dearer product, ask the customer whether cost is an issue. Asking further questions helps identify the products and services that match the customer's needs.

### **Never pressure the customer**

You should never pressure a customer into taking a particular course of action, but simply provide as much relevant advice and information as possible, then let them ask questions and tell you what they want.

### **Use your judgment**

Use your judgment and assess how much to say. Sometimes a customer may not have a lot of time to listen to advice, may not be interested in knowing anything more or may just want a quick answer.

### **Provide relevant information**

Keep in mind there is a difference between giving a customer a lot of information on products and services, and providing relevant information to meet their needs. Giving the customer too much information may make them think they are being pressured into buying a more expensive or bigger item, rather than trying to answer their question. Some organisations may have a policy of promoting alternative, fancier products and services.

### **Follow organisational policy**

Consider your role and responsibilities when providing options to customers. It may be organisational policy that you supply only initial information before forwarding the customer to someone else in the department.

## Product and service materials

Most organisations produce material to promote the products and services they offer. These can range from a basic one-page flyer to a website. You should be familiar with this material so you can answer inquiries and respond to customers promptly. Always ask someone if you are not sure of the meaning or if there is terminology unfamiliar to you. Having sound literacy skills is crucial in a customer service role.

You should know what form the material is available in, where it is located and who is responsible for updating it and keeping a ready supply. Materials can be in many forms including paper, DVD and other electronic forms. You should not have to waste valuable time locating it, especially if the request is by telephone or in person. The material may be kept in locations such as the front desk, the library, in a storeroom or in a filing system, or available for download on a website.

Product and service materials include:

- product brochures
- catalogues
- order forms
- policy documents
- price lists
- leaflets and brochures detailing company services
- website links.

## Product and service information

Some organisations require customer service and sales staff to keep a personal collection of brochures, catalogues, price lists and services lists at their desks, so the information is readily available. The information should always be up to date.

Remember, every time you deal with a customer, you affect their impression of the organisation. Satisfying customers quickly and efficiently gives them a good feeling about the organisation.

Organisations with websites should tell their customers about the website and the information it contains. They should also make sure this information is current.

Information in product and service materials includes:

- your business details
- descriptions of the range of products and services offered
- policy statements including service charters, and policies
- price lists
- technical specifications
- user manuals
- instruction guides
- rules and regulations
- advertising.

## Practice task 8

Read the following case study, then answer the questions that follow.

### Case study

#### Chambers Ltd

#### Sales department – Procedures for sending information to customers

##### General inquiries

Send a prepared package of information to anyone who calls asking for information. The information pack includes a brochure, price list, specific information sheets on products and services, and a product catalogue.

##### Particular customer groups

Specific types of information should be sent to specific customers on request. For example, people who have attended a recent seminar presented by our organisation may need follow-up brochures.

##### Sending information urgently

Email or courier information if a customer needs it urgently. Be aware of the organisation's procedures in these cases.

##### Redirecting inquiries

If your department or area cannot supply the requested information, direct the customer to the appropriate person in the relevant department or area, or to our website.

##### Following up requests for information

If the information or material requested is not immediately available, send the information as soon as it is, preferably within two weeks. Information received too late may mean losing a customer.

1. What is Chambers Ltd's procedure for sending information urgently?

2. Who should you direct customers to if you cannot help them?

3. If information is not available at the time it is requested, when should it be sent or provided to the customer?

## 2D Identify personal limitations in addressing customer needs and seeking assistance

There may be times when you cannot meet the needs of a customer immediately and need to seek assistance from others in your organisation. To deal with customer requests promptly, identify the designated people within the organisation who have responsibility for particular products or services.



### Redirect an inquiry

Sometimes it is not possible to respond to a request and help the customer immediately. The information requested may be specific to a particular area and the person the customer needs to speak to is unavailable. The information may need to be checked with someone else before it is given to the customer.

You may redirect an inquiry to your manager or supervisor, or someone who is experienced and has specific or detailed knowledge related to a particular product or service. Your knowledge of the organisation should help you select the right person. If you are unsure, you may need to consult the organisational chart or ask a colleague.

If the appropriate person is not available, explain this to the customer and tell them the other ways you can help them. Remember to follow the correct procedures for contacting another person within the organisation. No matter what action is taken, always promote a positive image of the organisation by acting promptly and courteously.

Here are some ways to redirect an inquiry.



- Take relevant details from the customer, such as their name and contact number, and refer this information as soon as possible to the appropriate person.



- Recommend another person or department that can help.



- Provide the appropriate person's details, such as telephone number and office location, if the customer needs an appointment.



- Explain to the customer how the inquiry or complaint is being dealt with and be sure they are happy with the solution you suggest.

## Improve your performance

It is also important that you continually improve your performance by taking control of your own learning and seeking ways to develop or learn new skills. Self-management is a crucial skill in today's business environment and one that employers value highly.

Seek learning and development opportunities whenever possible.

## Improve your performance

It is also important that you continually improve your performance by taking control of your own learning and seeking ways to develop or learn new skills. Self-management is a crucial skill in today's business environment and one that employers value highly.

Seek learning and development opportunities, such as the examples below.

### How to seek learning and development opportunities

Watch how experienced staff deal with customers and observe the strategies they use.

Take action to improve using feedback received from your manager.

Discuss ideas you have to improve work practices with your manager at your performance appraisal sessions.

Identify professional development opportunities such as attending conferences, taking short courses or enrolling in a course that leads to a qualification. You can do this by researching on the Internet, asking colleagues, or by reading course information.

Seek a mentor to guide your career.



## Practice task 9

Read the case study, then answer the questions that follow.

### Case study

Olinda has just started working for a small tour company. A customer comes into the office and asks for information about a tour to Yandibup, a place Olinda has never heard of. Her supervisor is not in the office and Olinda starts to feel nervous. She tells the customer she is not familiar with Yandibup but her supervisor will be able to help when she returns in an hour. The customer says he can't wait that long. Olinda takes the customer's details and tells him she or her supervisor will call him as soon as possible.

Olinda has a very busy afternoon and completely forgets to tell her supervisor. When she does remember the customer's request the following week, she has lost the note with his phone number.

1. How do you think the customer in this case study would react? How would you react?

2. Imagine you have sent a customer some information they requested about your organisation's services. What follow-up procedure could you use?

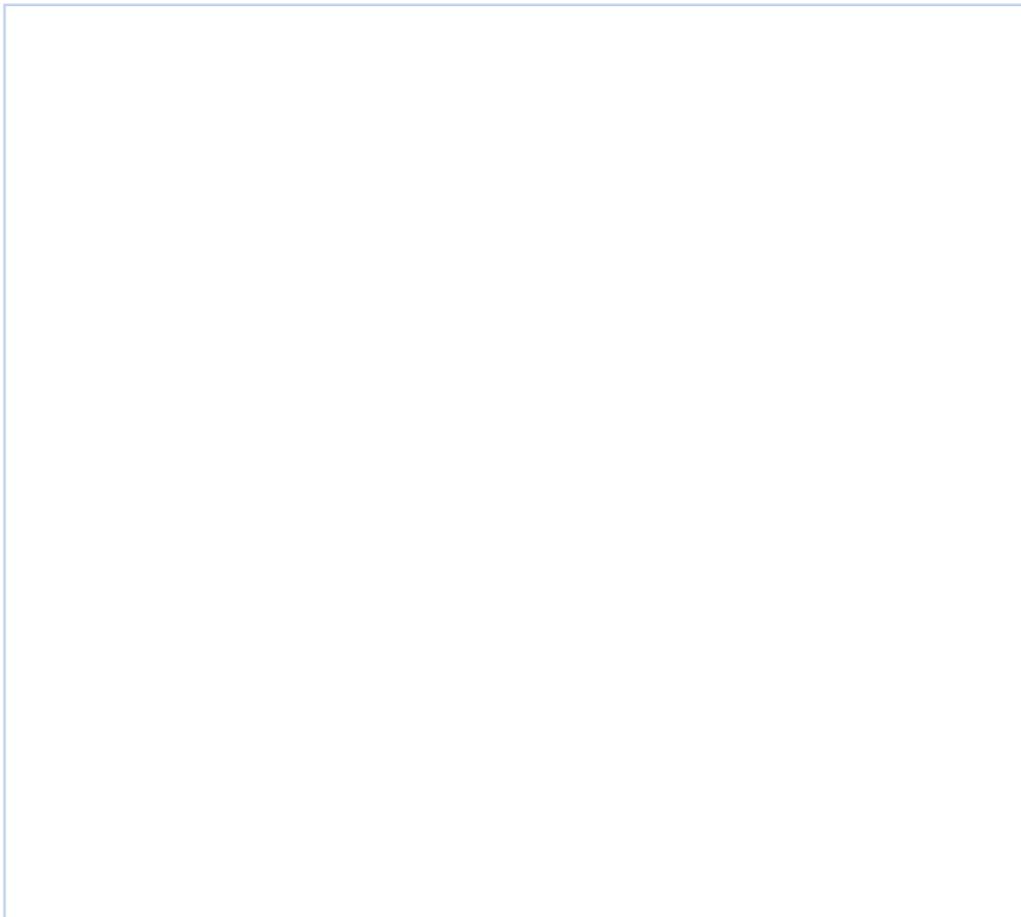
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*continued ...*

3. You require information for a customer from a person in another department of your organisation, but they are unavailable. What could you do?



4. How could Olinda improve her work performance?



## Summary

1. Active listening and questioning assist you to determine a customer's needs.
2. Information requested by a customer should be provided as promptly as possible.
3. It may be necessary to prioritise some requests, as some customer needs are more urgent than others.
4. When you are unsure how to meet the needs of a customer, always refer this to the designated person at your workplace.

## Learning checkpoint 2 Identify customer needs

This learning checkpoint allows you to review your skills and knowledge required to identify customer needs.

### Part A

1. List the questions you would ask to find out exactly what the customer wants in each of the following cases:
  - A woman visits the office and says, 'I'd like to speak to someone about your new product'.

- A man telephones his local council and says, 'I'd like some more information about rubbish services in my area'.

- An employee working in the sales department calls you and says, 'I need a database of clients'.

- You receive a fax that says, 'Could you please send me information about paper stock suitable for a small brochure as well as prices?' How would you find out exactly what this customer wants?

2. You receive a letter from a customer requesting general information about a service your organisation offers. The customer also requests an appointment with someone in the organisation to discuss the information. What steps would you take to supply the information as requested and so meet the customer's needs? Write a list of the steps in point form.

3. Think about how you could manage the way you do your job. Write a paragraph about how you intend to improve your performance with customers.

4. Explain three ways you could assess customer needs for urgency in order to identify your priorities for service delivery.

## Part B

Read the case study, then answer the questions that follow.

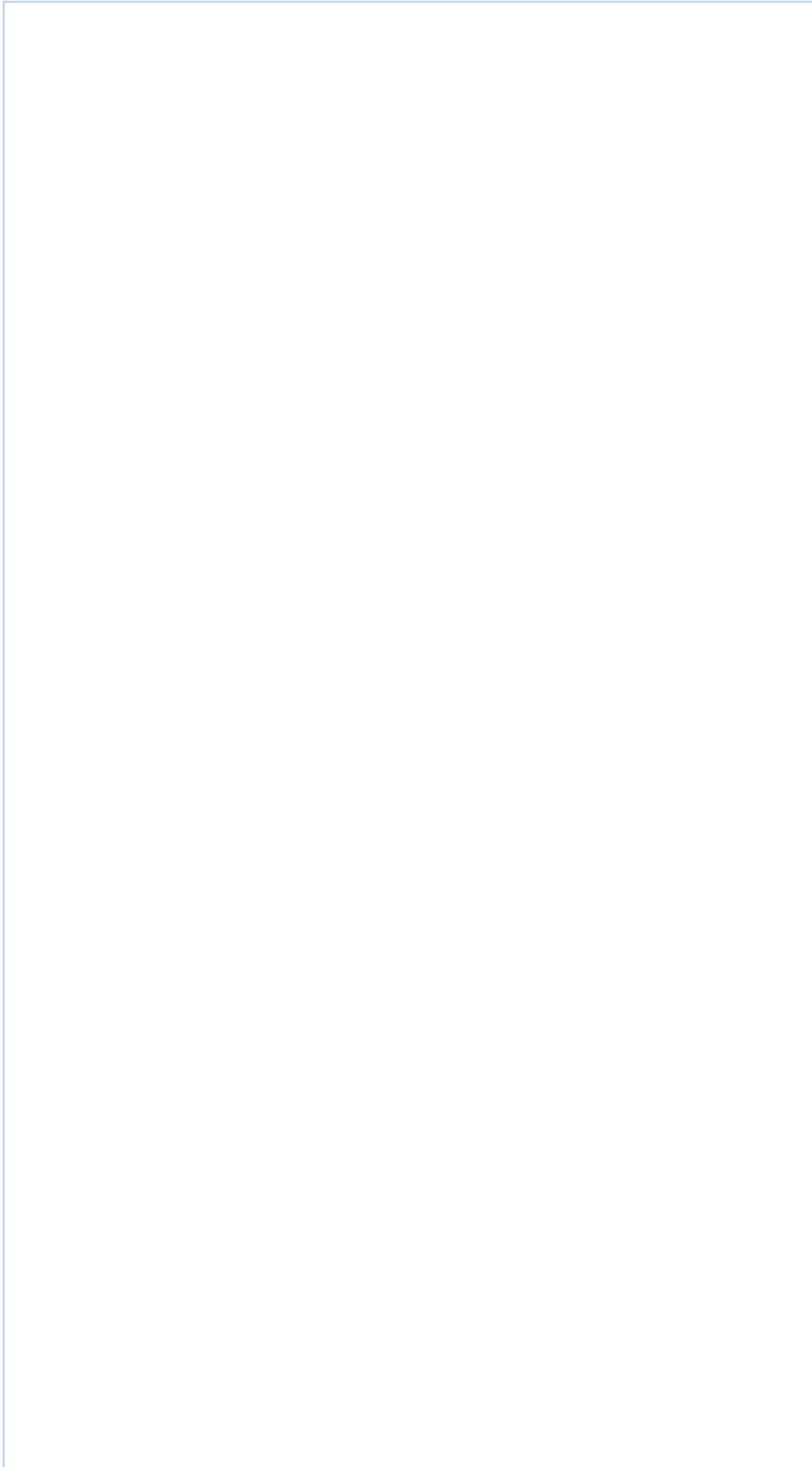
### Case study

You are on the inquiry desk at Ollie's Office Supplies. The company has just advertised a new colour printer, the ColourMaster 2020, which is selling for \$950 with a one-year warranty. You receive the following telephone calls.

- A caller asks about a trade-in. You're not prepared for this and have no idea what to say.
- A caller asks about the price and features of the printer.
- A caller asks technical questions about the colour density. Only the equipment manager knows these details.
- A caller telephones to say he's interested in the type of printer but it's too expensive for his needs.

1. Write a paragraph for each situation, describing how you would deal with each call.





2. Think of three workplace situations when a customer may request information.
- For each situation, list the questions that should be asked.
  - For each situation, describe the actions that should be taken.



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## Topic 3

### Deliver a service to customers

It is essential that an organisation provides a service to customers that meets their needs. Good service gives you satisfied customers. Satisfied customers are loyal and recommend your organisation to others. This is what every business wants. It is free advertising of the most effective kind. It is important to let customers know clearly, concisely and within an agreed time frame if there are going to be any problems or delays in providing the goods or services they need. When you are meeting a customer's needs, you should keep an eye out for opportunities to improve the quality of the service or products.

In this topic you will learn how to:

- 3A Provide prompt customer service
- 3B Provide information regarding problems and delays
- 3C Communicate with customers in an appropriate manner
- 3D Identify opportunities to improve the quality of services and products

# 3A

## Provide prompt customer service

The quality of the help and service you provide to customers is vital. To provide good service, you need to have a thorough knowledge of the products and services of the organisation and all details related to these such as price, availability and delivery. To assist their employees, most organisations have developed policies and procedures to guide service delivery.



### Organisational requirements

An organisation has methods and procedures for dealing with customers. These policies and procedures take into account legislative requirements such as workplace health and safety (WHS), privacy laws and consumer protection laws.

They also explain how to deal with customers in particular circumstances, such as when to refer a customer to someone else and what to do when the person the customer needs is not available. Some organisations establish customer service standards that outline such things.

Customer service standards include guidelines on how to:

- make telephone calls to customers
- answer customers' calls
- make arrangements to visit a customer
- make arrangements for the repair of items
- discuss products and services
- arrange payments and deliveries
- make arrangements for replacements and refunds
- offer discounts or special offers.

## Make a telephone call to customers

Before making a telephone call, be prepared. This shows the person being contacted you are organised and efficient. Write down the information you want to communicate before you call. This could be who you need to speak to and the important points you want to make.

Below are some tips for making phone calls.

Before making a telephone call	During the telephone call
<p>Before making a telephone call to a customer, you need to:</p> <ul style="list-style-type: none"><li>• know who you want to talk to – if you don't know the name of the person, you should write the name of the position; for example, the accounts clerk or Ms Pezzano's secretary</li><li>• know what you want to say – the reason for the call</li><li>• have a list of the information you need in front of you</li><li>• have a pen and some paper handy.</li></ul>	<p>As the call is made, your organisation's procedures should be followed. For example, you should:</p> <ul style="list-style-type: none"><li>• greet the person</li><li>• introduce yourself</li><li>• tell the person the name of your organisation</li><li>• clearly explain the reason for the call.</li></ul> <p>The person you are speaking with may transfer you or continue taking your call. You should write down the details of the call and any information that you provide and the customer gives to you.</p>

## Answer customers' calls

The receptionist is often the first point of contact the customer has with an organisation. Most organisations have a policy for answering the telephone. This may include answering the phone within three rings, giving a specific greeting, saying the name of the organisation in a specific way, saying your name and asking how you may help. A clear voice and a pleasant manner are very important. Never use slang.

You will usually be expected to greet the customer politely, identify your organisation, give your name, and make the customer feel welcome by offering assistance.



### Examples of organisational standards for answering calls

Answer all calls quickly, ideally within 10 seconds. When customer calls are answered with a recorded announcement, the customer should speak to a person within 30 seconds of the call being answered.

Ensure the customer quickly speaks to the person who can best deal with them.

Where calls are to be answered by an answering service or voicemail that requires the customer to leave a message, ensure you return the call to the customer ideally within four hours.

If customers' calls are not answered immediately, and they are put on hold, ensure that they are acknowledged during the waiting period and apologise for the delay when they are answered.

## Common procedures for answering calls

The following procedures tell you what to do in some common situations when you are answering a call from a customer.

### Putting a customer on hold

Sometimes a customer may need to be put on hold while you find out some information or take another call. You should tell the customer what is being done and that it will not be for long. If they have to be on hold longer than you first thought, get back to the customer and explain the situation.

### Transferring a customer

If the customer needs to be transferred to someone else, explain this to them, then place them on hold while briefly describing the situation to the person they will be transferred to. This means the customer won't have to explain the situation all over again to someone new. If the extension you call is busy, ask the caller whether they would like to wait. If they say no, ask them to leave their number so the person can call them back.

### Screening a call

There may be times when a staff member does not want a call transferred to them. If this happens, explain to the customer that the person is in a meeting and suggest someone else they can be transferred to, or take a message.

### Ending a call

Ending a call also requires courtesy. Remember this may be the customer's first experience dealing with your organisation, so you should always end a call politely.

## Make arrangements to visit a customer

Once the customer's needs have been identified, it may be necessary for you or someone else from the organisation to visit a customer. There are a number of guidelines that may be included in an organisation's policies and procedures to deal with these visits.

How to make arrangements to visit a customer:

- Make a time to visit that best suits the customer.
- Provide the customer with the name and contact details of the person who will be visiting them.
- If the arrangements have been made well in advance, then you should confirm the visit. Ideally this should be done about two days beforehand.

## Arrange for the repair of items

Successfully dealing with repair issues ensures excellent customer service.

Below are some guidelines relating to repairs to items and equipment that may be included in an organisation's policies and procedures.

### Examples of guidelines relating to repairs

- Advise the customer where they can report a problem.
- All staff should know how best to handle the problem to ensure the customer's inquiry can be dealt with effectively.
- Make it easy for customers to describe their problems.
- Advise the customer what you will do next and the process involved in making the repairs.
- Provide the customer with a contact number to call for easy reference if they have queries during the repair process.
- Once the item has been repaired (ideally within two days), follow up with the customer to check everything is working as they require.

## Example: make arrangements for repairs

Jones Motors recently sold a new vehicle to a customer. Soon afterwards, it broke down and Jones Motors arranged the urgent replacement of parts to meet the customer's critical departure deadline. The customer was impressed that the business took his departure deadline seriously and gave information to reassure them that the deadline would be met.

Peta: We should be able to get your new car back on the road by this afternoon.

John: I appreciate your prompt response in getting repairs organised.

Peta: This shouldn't happen with new cars.

John: I was concerned that the breakdown was going to delay my trip.

Peta: That's why we need to repair quickly. We know it is important for your business.

John: I must have sounded annoyed when I called you about it yesterday.

Peta: That's okay. Our policy is to minimise the negative experiences that a car breakdown can create.

John: Well, I do feel like a valued customer and that you took my needs seriously.

Peta: We want you to keep coming back to Jones Motors. Your business is important to us.



## Know about the organisation's products

To provide a prompt service, you need to know everything about the products or services of the organisation. Product or service knowledge can also extend to being able to use measurements or dimensions to determine customer requirements. You may also need to make calculations to make sure the service fits a customer's budget.

If your organisation handles many products, you need to be familiar with everything available in order to meet your customers' needs and to provide a prompt service. For example, a music store may stock CDs, DVDs, videos, posters, headphones and sound systems. There are many things you should know about the products your organisation provides.

What you should know about the organisation's products:

- the price, range of prices and comparison of prices
- availability of the products and/or services and details such as size, colour, warranty, conditions, etc.
- payment and delivery details
- how to calculate the area of a room and advise on product suitability for those dimensions
- special offers available
- replacements and refunds
- returns
- extra services.

## Know about the organisation's services

If your organisation offers a service, you need to provide information on the type and range of services offered. For example, a consultancy firm may provide employment assistance, career advice and job placement. A local council may provide information and advice about government regulations, as well as a range of services such as rubbish removal.

Organisations also offer services to internal customers. For example, in a large organisation there may be departments responsible for specific information such as accounts and sales. The sales department may supply other departments with sales figures, customer records or debtors' information.

Many organisations provide both a product and a service. For example, a chemist may sell pharmaceutical goods as well as hiring out equipment such as crutches. A shop selling household cleaners may offer a cleaning service. A company may sell computer software as well as providing workshops on how to use it.



## Price

Many organisations have a price list that details the cost of all products and services offered. Most organisations also list the prices on the product's order form. You need the most current price list to provide the correct information. Prices may change from time to time for many reasons. There may be specials on a certain range of products or a price increase. Some organisations have a website that shows a current price list.

Sometimes it is necessary to get more information from a customer before a price can be provided. For example, your organisation may have a discount for bulk purchases so you need to know the quantity the customer requires.

Here are some other factors relating to price.

Prices relevant to external customers	Prices relevant to internal customers
<ul style="list-style-type: none"> <li>• Cost of products</li> <li>• Cost of services</li> <li>• Discount for bulk purchases</li> <li>• Cost price for suppliers</li> </ul>	<ul style="list-style-type: none"> <li>• Stationery</li> <li>• Office equipment</li> <li>• Travel</li> <li>• Accommodation</li> </ul>

## Product availability

Knowing the availability of products and services is very important. You need to give customers the exact details of the availability of items.

What you should know about product availability
<ul style="list-style-type: none"> <li>• Products that are in stock and products that have a waiting time of days or even months.</li> <li>• Whether a single item will be available but a bulk product order will take longer.</li> <li>• Whether a product may only be available in certain areas. Generally this information is written on the product catalogue.</li> <li>• Whether the organisation offers services outside business hours. Customers may want to make an appointment to organise a quote for a service.</li> </ul>

## Payment and delivery details

Organisations have policies and procedures for receiving and making payments, forwarding information and handling a product. This includes packaging, delivery and mailing details, as well as the most appropriate delivery method (a courier service, personal delivery or email). Different organisations have different payment and handling methods. You need to know who is responsible for the delivery of products so an inquiry can be redirected if the customer wants more information.

Customer queries may relate to:

- when payment is due or will be made
- the method of payment; for example, prior to delivery or following delivery
- what form of payment is acceptable; for example, cheque, credit card, cash
- how urgent orders are processed
- the process for establishing an account
- how long it takes for a product to be delivered
- why a product has not arrived when ordered.

## Special offers

Many organisations offer special deals to customers that benefit both the organisation and the customer. When customers contact your organisation, you should inform them of any current specials and, if relevant to their needs, explain how the special offer may help them.

Examples of special offers include:



Buy two and get one free!



Join now and get one month's free membership!



Purchase 50 or more and get a 10 per cent discount!



- Book early to receive our discount rate!

## Replacements and refunds

Most organisations have a policy for the refund or replacement of items. These policies should be based on Australian consumer laws.

Instead of offering a refund, some organisations offer customers a credit note to purchase alternative products and services, or an exchange where they can swap the item for something else. Being able to tell customers they are eligible for a replacement product or a refund helps improve customer service.

You should be familiar with any replacement and refund policies and procedures your organisation has.

Customers may receive a refund for goods that are:

- faulty
- damaged
- incomplete
- delivered late
- not as ordered.

## Returns

Certain conditions can apply to customers who want to return goods. Perhaps they have realised they have ordered the wrong item or received the incorrect number of items. Returns may be accepted only if they are returned clean and in the original packaging.

Replacement goods may be sent immediately, with an additional 10 per cent discount on future purchases. Again, the value of the returned goods may be able to be credited or refunded to the customer.

Returns policies should be based on Australian consumer laws, protecting both the consumer and the organisation. Make sure you strictly follow your organisation's policies and procedures and refer customers to your supervisor if you cannot satisfy them.

Left hand	Right hand
If the fault lies with the customer (they ordered the wrong product), the returned goods may be accepted if the customer pays the postage.	If the fault lies with the organisation (it delivered the wrong product), a courier may be ordered to collect the goods.



## Extra services available

An organisation may offer extra services. Sometimes this comes at no extra cost to customers. For example, a product or service may be available at a lesser amount if the customer is purchasing something else.

Know what is on offer in your organisation in order to provide the maximum amount of information to customers. Keep a copy of any specials, discounts or company advertisements so you can quickly refer to the details when a customer asks.

Examples of extra services include:

- a product or service may be available at a lesser amount if the customer is purchasing something else
- a computer company may offer a help-desk service on computer sales
- a product may come with free in-store demonstrations or a demonstration video
- a training manual may come with a CD-ROM.

## Practice task 10

Obtain a copy of your organisation's refund or replacement policy. If you are not in the workforce, obtain a refund or replacement policy from another organisation of your choice. Describe the main details of the policy.



## 3B

### Provide information regarding problems and delays

Problems or delays are a common feature of everyday business and customers expect them to be acknowledged promptly. Responsibility for the problem or delay should be taken by the organisation and a reasonable solution offered.



### Deal with problems and delays

Problems and delays can occur when fulfilling all sorts of customer needs. Problems could be anything from a product not being available, parts not in stock or a wait for the service to be provided to the appropriate person not being available to provide the specific information or advice.

If a customer becomes emotional or angry that you cannot meet their need immediately, listen to what they have to say and avoid becoming defensive or putting the blame on someone else.

Remember, in some cases you can regain, maintain or increase customer satisfaction by handling problems and delays extremely well.

Below are some tips for handling customer problems and delays.

### Tips for handling customer problems and delays

**1**

Treat customers with genuine empathy, courtesy, patience, honesty and fairness.

**2**

Inform the customer of a problem or delay as soon as it is identified.

**3**

Inform the customer in person and do not leave a message or rely on email.

**4**

Before you speak to the customer, and keeping in mind the impact the problem or delay will have on them, gather all the appropriate information.

**5**

Tell the customer how it will be handled and advise them of when to expect a resolution to the problem or delay.

**6**

Advise the customer you are taking full responsibility for dealing with the problem or delay.

**7**

Keep the customer informed of progress.

**8**

Always work within relevant government regulations and ensure customers' rights are protected as per your organisation's customer service policies and procedures.

## Appropriate time frames

Inform the customer of a problem or delay as soon as it identified. Be wary of leaving a time gap or saying you will get to someone in 10 minutes with the information they require, finding you cannot get the information you need in that time follow up a couple of hours later. In this situation, the customer have the right to feel let down as you have not delivered on promise.



Remember you have taken full responsibility for the problem and need to keep the customer informed and up to date as to when you will be able to deliver the product or service.

### Practice task 11

Read the case study, then answer the question that follows.

#### Case study

In January, Joan requested a printout from her gymnasium of her previous year's payments. The gym receptionist recorded her request and Joan was told the information would be available for her at reception in ten days. The information was not at reception two weeks later and Joan was told to ask again in a week – but it was not available then either. Two months passed with no information being provided.

As the receptionist who dealt with Joan at the two-month point, outline in dot-point form how you would deal with this delay.

# 3C

## Communicate with customers in an appropriate manner

Delivering a service to customers may be providing information on the telephone or via email or mail. It may be serving a customer in a shop, repairing a car or a home appliance, or assisting a customer with a technical problem over the telephone. It may be providing an internal customer with information. No matter what area of customer service you are involved with, your communication must be clear and courteous.

It is essential that you learn to communicate clearly, specifically and in a courteous manner when providing a direct customer service.



### Communicate clearly and concisely

When dealing with a customer, remember to use plain, understandable language, as long and complicated sentences may confuse people.

You need to consider who you are dealing with and what is appropriate to a specific audience or person. You may use different words when providing a service to a child or adjust your communication when dealing face-to-face with a person who has a hearing impairment.

The list below provides you with a guide to the correct word to choose when striving to communicate in a clear and concise manner.

Communication should be:

- clear
- complete
- concise
- concrete
- correct
- courteous.

## Be courteous

Being courteous is showing regard for others in manners, speech and behaviour. The saying 'Treat others the same way you want them to treat you' is a worthwhile reminder when dealing with customers. Even if you are having a bad day, an effort needs to be made to deal with customers in a courteous manner.

Here are some points to remember when dealing with customers.

### Focus your attention

Focus your full attention on your customer, not just when dealing with people face-to-face but also on the phone. Phone customers can detect when you are not giving them your full attention.

### Watch your tone of voice

Watch the tone of your voice and avoid speaking in a condescending way or using a sarcastic tone.

### Use body language

Make your body language match your words.

### Ask questions

Ask the customer how they would like a problem to be resolved. If they insist on being unreasonable, politely repeat what you can do for them.

### Remain calm

When dealing with complaints, remain pleasant, caring, patient and sympathetic.

### Display friendliness

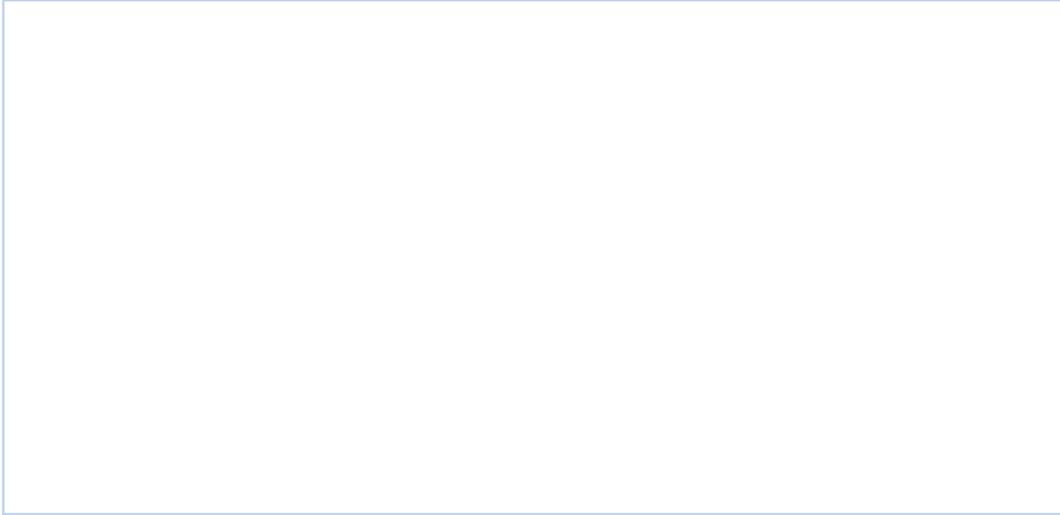
Display friendliness and be approachable. However, being friendly does not mean being overly familiar. Even if a customer is upset, do not touch them.

## Practice task 12

Some examples of discourteous behaviour are:

- providing information to a customer while looking away from them
- saying to an internal customer 'Here is the monthly information' as you walk away
- not listening to the ideas of a potential customer and trying to force your ideas onto them as it is easier for you.

Outline three specific examples of courteous behaviour and three specific examples of discourteous behaviour you have encountered.



## 3D Identify opportunities to improve the quality of services and products

As an employee who is dealing with customers, you should always look for opportunities to improve the quality of your company's services or products. Better products and services lead to customer loyalty and an increased number of customers. You will be able to immediately act on some simple ideas while dealing with the customer. These include showing them new stock that has not been advertised or put on the showroom floor, or explaining alternate service options provided by your company in more detail.



### Opportunities for improvement

Employees who deal with internal and external customers on a day-to-day basis are often the best people to identify these opportunities. Just focusing on what you hear from customers, and noting what you are not able to provide to fulfil their needs, can highlight opportunities that you can act upon.

Different ways in which opportunities for improvement can present themselves are outlined here.

**Warranties, guarantees and support services**

The opportunity here might be when you provide the customer with an additional year's guarantee or warranty, or tailor the support services to meet the exact requirements of the customer.

**Packaging options**

This is when you offer alternative packaging or an option to deliver the product unwrapped if that is the customer's preference.

**Pricing options**

Pricing options can provide more flexibility and meet the customer's budget constraints. Pricing can often be adjusted when buying more than one product or organising for a service to be provided over a set period of time. For example, shops that sell electronic equipment may provide a reduced price if purchasing both a television and a DVD player. Also, a discount might be given to long-term customers.

**Delivery procedures**

Delivery procedures for the goods and services can be tailored to meet the needs of the customer. One such example is where a conference centre adjusts its services to meet the needs of a couple's wedding reception as well as the needs of people organising a dental conference.

**Product information**

Providing product information may be all that is required. You might realise that a customer has not been provided sufficient information, or has no knowledge that your organisation provides a particular service or sells a particular product.

**Complaints records**

Complaint recording systems can provide opportunities. To identify an opportunity, you need to take the time to read customer feedback and complaints. Something you read may spark an idea as to how you can improve a service or product for a customer.

## Record and present your ideas

Opportunities that you identify in your interactions with customers may apply to one individual customer or you might have an idea that will improve a particular process or identify an important piece of information that is missing from a brochure.

These ideas need to be jotted down as soon as you think of them, as often they are forgotten during the day. Having a notebook close by to record these ideas is a good idea.

When you have an idea that might improve a particular process, product or service, you should discuss the idea with your supervisor, who may suggest you present it at a team meeting for further discussion and sharing with others.

Presenting your ideas in writing can assist you to clarify your ideas. In your proposal clearly explain your idea and outline the benefits for the customers and the organisation. Use point form in your proposal where applicable so that your idea is presented clearly and concisely.

### How to record and present your ideas

1. Write the idea down as soon as you think of it.
2. Discuss the idea with your supervisor or manager.
3. Share and discuss the idea with others.
4. Present your ideas in a written proposal.

## Example: present ideas in a written proposal

### **Suggestion to re-assess the layout of the shop floor for the Fabulous Frock Shop**

#### **Reasons for suggestion**

- In the last fortnight I have noticed many customers browsing for a few minutes and then coming to me or other customer service assistants to ask where the ZAC brand of clothing is located in the shop. This brand has been advertised in our latest catalogue and the advertising is bringing many more customers to the store, but they cannot find the stock.
- All of the customer service assistants feel that they have not been provided with adequate information about the sale and other items mentioned in the catalogues, and are not able to provide the customers with details such as lay-by, deposit required, stock numbers and transferring from other stores.

#### **Suggestion**

I suggest that when brands such as ZAC are advertised in the latest catalogue, we:

- re-assess the placement of brands on the showroom floor
- put the brands that are mentioned in the catalogue or are on sale in a prominent place on the showroom floor
- brief all customer service assistants on the specials and featured catalogue brands, before they are displayed, in such things as number of articles available for sale, lay-by and return policy on sale items and any other information related to catalogue items.

#### **Benefits for the customer**

- they don't waste time looking for brands
- it reduces their frustration
- it provides more confidence in the customer service assistants
- they are happy and satisfied.

#### **Benefits for the organisation**

- increased sales and profits
- increase in return customers
- benefit gained from catalogue
- happy, confident and competent customer service assistants.



## Practice task 13

1. Provide examples of how you have identified opportunities for improvement when delivering a service to customers, and how these opportunities occurred.  
If you are not in the workforce, interview a person who has regular contact with customers and ask them for their ideas and experience, or choose an organisation you are familiar with and come up with some ideas of your own.



*continued ...*

... continued

2. Plan a written proposal for an improvement you have identified that relates to your place of work, your learning organisation, or an organisation you are familiar with.

Use the previous example as a guide and write your answer in this table.

<b>Identified area in need of improvement</b>	
<b>Reason/s for suggestion/s</b>	
<b>Suggestion/s</b>	
<b>Benefits for the customer</b>	
<b>Benefits for the organisation</b>	

## Summary

1. Organisational procedures and guidelines will inform how you provide prompt customer service.
2. Product knowledge is essential when delivering a service to customers.
3. Inform the customer of the problem or delay as soon as it is identified.
4. Use plain, understandable language in your dealings with customers.
5. Employees who deal with internal and external customers are best placed to identify opportunities to improve the quality of service and products.

## Learning checkpoint 3

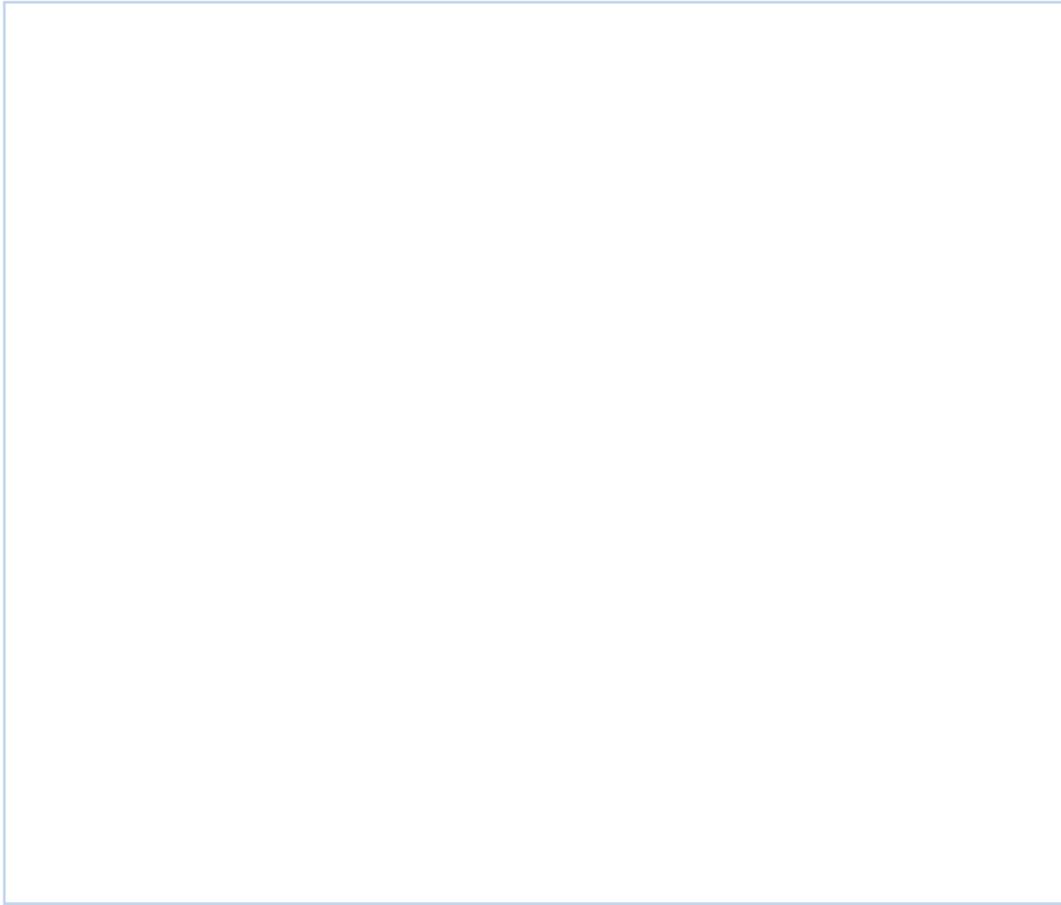
### Deliver a service to customers

This learning checkpoint allows you to review your skills and knowledge required to deliver a service to customers.

#### Part A

1. Explain your organisation's procedures for each of the following:
  - answering the telephone
  - greeting a client
  - contacting another person within the organisation
  - handling confidential information
  - providing specific information
  - sending information urgently
  - redirecting inquiries when you are unable to provide answers for customers.

If you are not currently in the workforce, explain the procedures of an organisation you have previously worked for, or one you are familiar with.



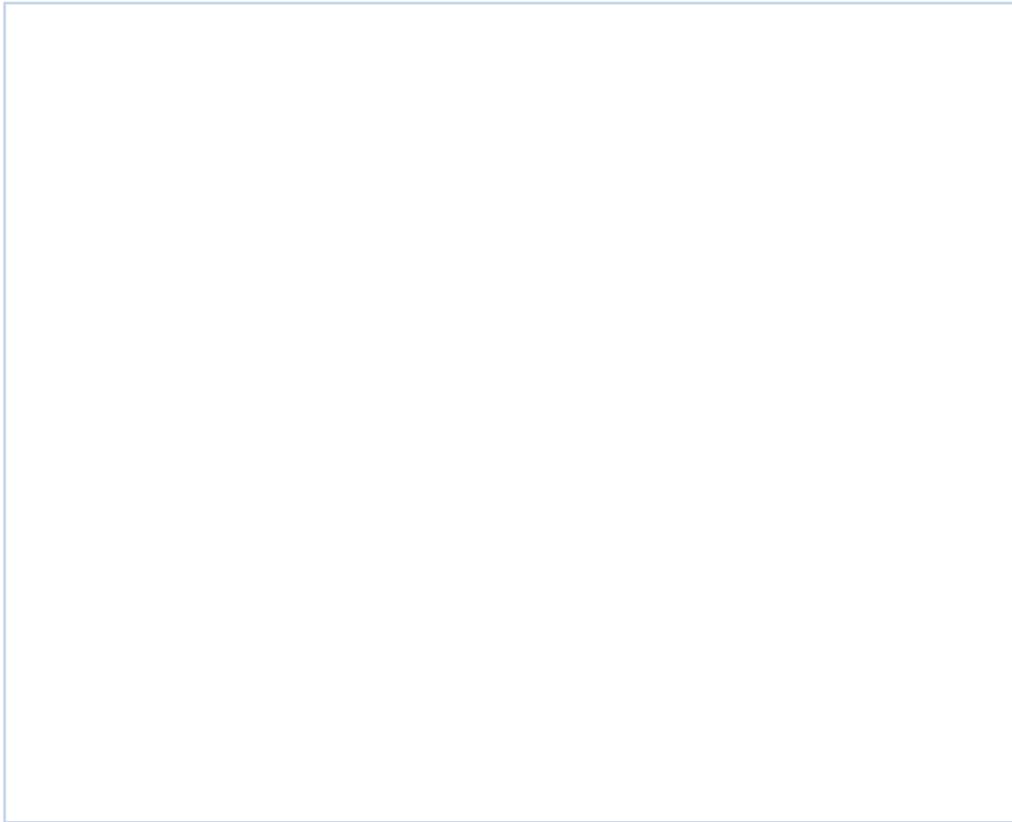
## Part B

Read the case studies, then answer the questions that follow.

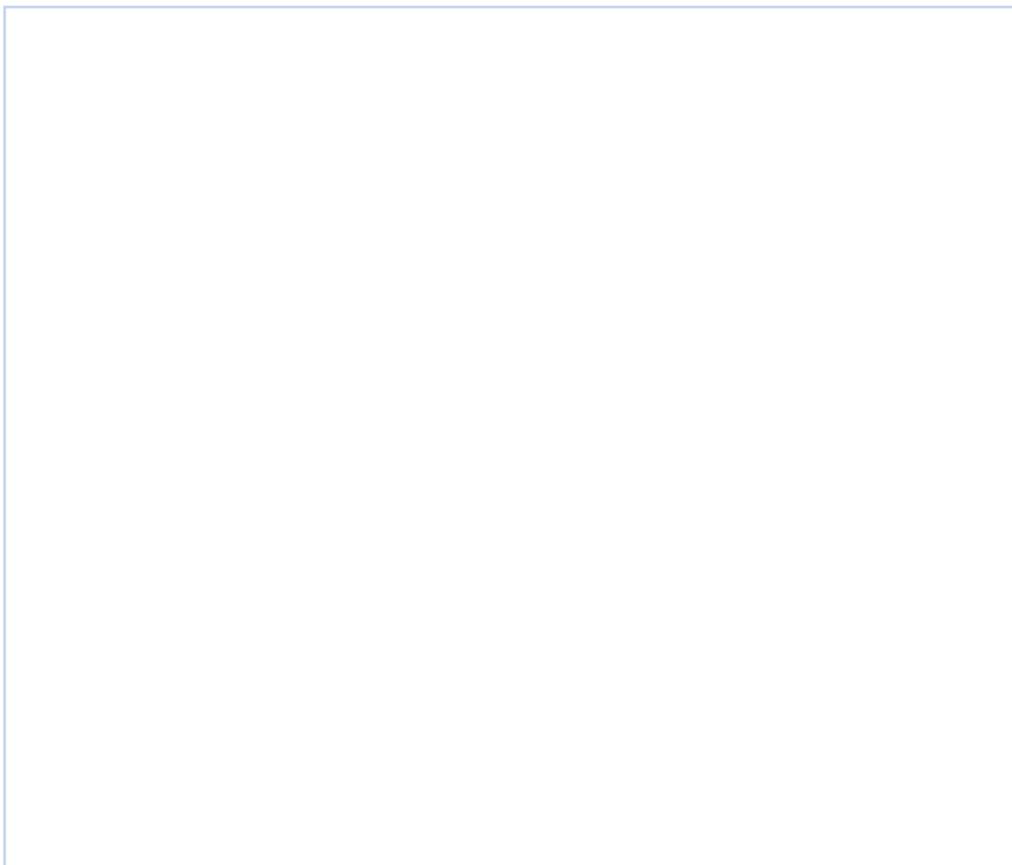
### Case study

A client telephones Clayton Financial Brokers requesting information about a superannuation package. The office assistant briefly explains the package and offers to send a comprehensive information brochure immediately. She advises the client that if further information is needed, she can call and make an appointment with the superannuation specialist Mr George Firth. Two weeks later the client calls to say she has still not received the information.

1. What steps should the office assistant take to satisfy this client?



2. What steps could the assistant have taken to avoid this problem?



### Case study

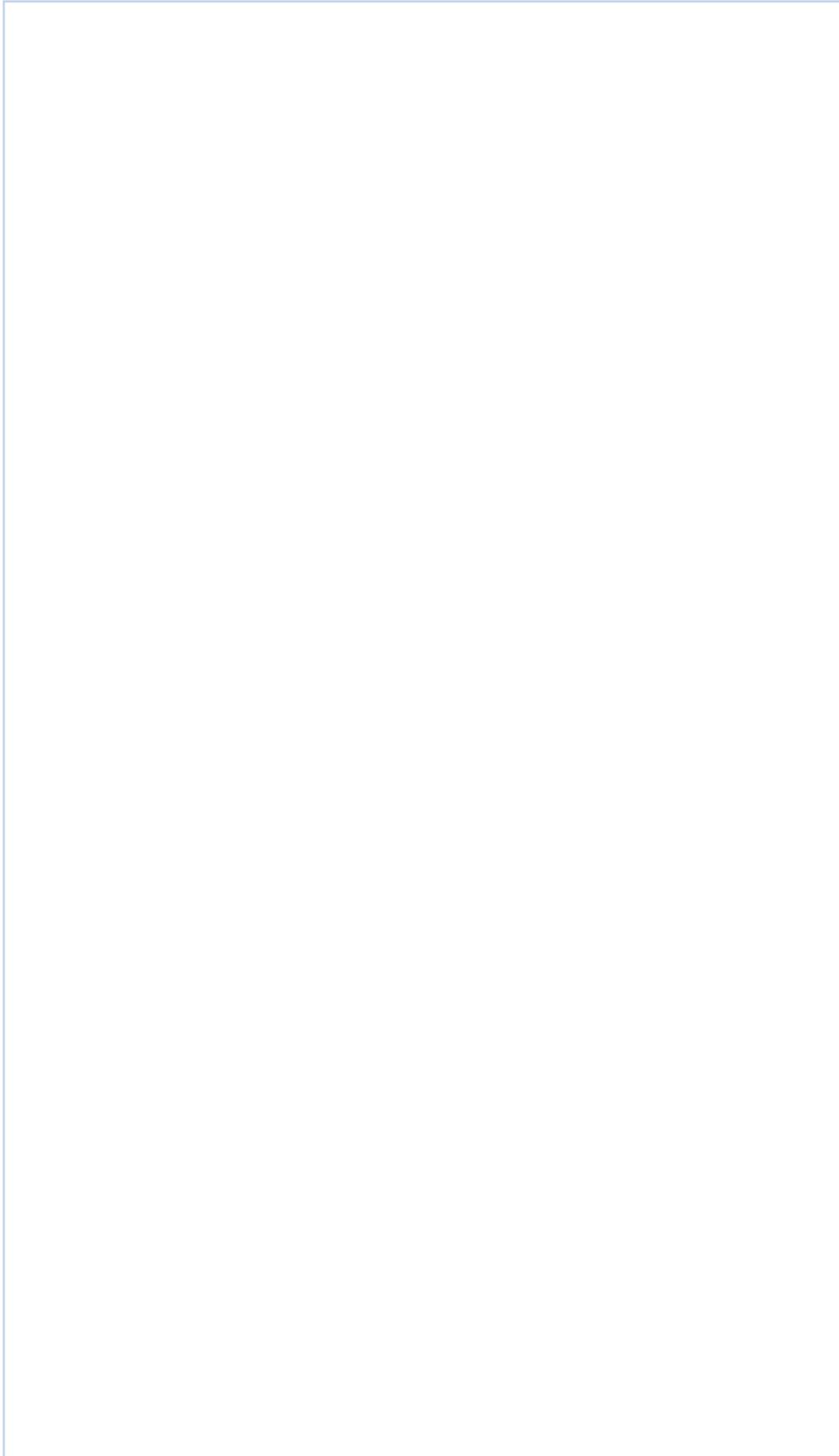
A visitor to Walsh's Real Estate asks for information about a property advertised in the newspaper. The visitor appears to be in a hurry. The agent responsible for the property is out of the office and is not expected to return until late afternoon. The receptionist apologises for the absence, explains that the agent will not be available until 4.00 pm and returns to work. The customer is anxious to get the information and leaves, very annoyed.

3. What do you think the receptionist did that was right?

4. What do you think the receptionist did that was wrong?

5. What do you think the customer now thinks of Walsh's Real Estate?

6. Describe the steps the receptionist could have taken to keep the customer happy.



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## Topic 4

# Process customer feedback

Feedback is the term used to describe the comments an organisation receives from its customers about the customer service the organisation provides, the organisation's products and services, or a situation the customer has experienced when dealing with the organisation.

An essential part of any business operation is to gather the feedback received from customers. This feedback is crucial to the success of a service-oriented business and allows an organisation to ensure that the service being provided to customers is meeting their needs.

Feedback needs to be followed up and dealt with promptly. Therefore, it is vital that customer service employees recognise feedback when it appears, as it comes in many different forms and from a wide range of sources. Organisations will have procedures to guide you when recording and dealing with customer feedback and communication.

In this topic you will learn how to:

- 4A Recognise customer feedback promptly and handle comments sensitively
- 4B Record accurate feedback and communication between customers and the organisation
- 4C Identify any unmet customer needs
- 4D Assist customers to make contact with other services

## 4A Recognise customer feedback promptly and handle comments sensitively

When people think of feedback, they often think of the complaints and criticisms that customers make. But feedback can also be positive and organisations often receive compliments and praise from satisfied customers. Also, organisations often ask their customers to give them feedback so they can see how they are performing and where they might need to make improvements.

Feedback, either positive or negative (a complaint), may relate to damaged goods or delivery problems, delays in the provision of a service, invoicing errors or the quality of customer service or service provision.

Other types of feedback may take longer to deal with. For example, it may be necessary to collect sufficient information and give it to a supervisor before a decision can be made about a customer's query and before the customer can be notified. There may be a number of survey forms, requiring time to collate, analyse and decide what action needs to be taken.

You may need to refer feedback of a serious nature to your manager or a colleague with suitable expertise. Feedback that requires sensitive handling may need to be referred to the organisation's legal advisor.



### Types of feedback

As well as receiving feedback from external customers, feedback can come from internal customers – your colleagues, supervisor or manager. For example, you may receive feedback from your manager about the quality of the work you have done or the way you handled a customer. A team member may thank you for completing an important task quickly.

The following table describes some of the feedback an organisation might receive from both internal and external customers.

Type of feedback	External example	Internal example
Compliments	'I really appreciate the effort you put into making sure I received the goods in time.'	'Thanks for helping out when we were so busy.'
Complaints	'I'm always kept on hold when I call your organisation.'	'I've been waiting a week for the information I asked you to get for me.'
Advice and suggestions	'Will your organisation introduce payment online? It would be so much easier for me.'	'I liked the way you set out the report but I'd like more graphics such as charts and graphs next time.'
Criticism	'Your products are far too expensive.' 'Every other store I know offers after-hours delivery.'	'I didn't like the way you spoke to that customer just then.'
Testimonial	'Toby's Tyres always provides top class service – and the best tyres in the business. I'd never go anywhere else.' Mr Blake Fewster, Milltown	'Caroline is our customer service officer of the month. Well done Caroline. Customers were pleased with the help you gave them when we were implementing our new online payment system.'
Surveys, questionnaires	A feedback form completed by a participant at a seminar.	A skills audit completed by staff.

## Why is feedback important to an organisation?

Organisations that meet their customers' needs and show that they are genuinely trying to provide good service are more likely to be successful.

When the feedback that is given is incorporated into the organisation's operations, it should lead to improved products, more-efficient processes, improved services and satisfied customers. For example, positive comments received about products should be relayed to the sales and marketing staff, who might use the comments in promotional campaigns or when they are speaking with other customers.

On the other hand, negative comments should be followed up to see why customers complained. This could bring about changes such as an improved product or a new pricing policy. It is especially important to get feedback from lapsed customers; that is, those who have stopped buying from you. Why did they leave? Where did the organisation go wrong? What can it do to get the customer back?

All positive and negative feedback is important.

All feedback allows an organisation the opportunity to:

- examine its strengths and weaknesses
- reflect on the service it provides
- understand its customers better
- take steps to improve its performance.

## Develop customer loyalty

Responding effectively to feedback also allows an organisation to build a relationship of trust and confidence with its customers. Developing and maintaining customer loyalty is essential. There is an old saying that it takes twice as much effort to gain new customers as it does to keep existing ones, so it makes sense to listen to what your customers are saying to you and use the information to improve your services. Loyal customers will refer others to your organisation. Word of mouth is extremely useful because your existing customers do a lot of the selling for you. It is also true that it only takes one poorly handled situation for an organisation to lose a customer after years of loyal service.



## Different forms of feedback

There are many different types of feedback that organisations receive every day from their existing customers, potential customers, suppliers, contractors, consultants and anyone else who deals with the organisation. Feedback is often unsolicited. That means the organisation has not asked for it. Sometimes this feedback is positive ('Thanks for sending the order so promptly') and sometimes it is negative ('Your salesperson was very rude to me').

All employees have a responsibility to be familiar with the various types of feedback their organisation receives so they can respond to it in an appropriate way. Every time an employee handles a customer's feedback, they are contributing to the customer's perception of the organisation. Good customer relations are developed from the day-to-day treatment of customers' comments, complaints and suggestions.

### Compliments

When customers believe that an organisation has given them excellent service or they are delighted with a product, they sometimes contact the organisation and tell them. They might write a formal thank-you letter or telephone to express their appreciation personally. You'll often receive a compliment on the spot: 'Thanks for phoning your other store. That's saved me heaps of time.' Your colleagues might also pass on compliments. For example, your supervisor might praise you for putting in an extra effort to make sure a catalogue went out on time, or for the way you handled a customer's request. Team members might thank you for completing your part of a project on time.

### Testimonials

Some feedback is given in the form of a testimonial. This is a formal statement written by a customer that compliments the organisation, such as 'Watson's Removalists helped our company move with a minimum of fuss. We'd certainly use them again'. Many organisations use testimonials in their marketing campaigns.

### Advice, suggestions or opinions

Customers often pass on advice or give suggestions. For example:

- 'The conference was great but next time it would be better if each session was longer.'
- 'I think it would be a good idea if you packaged the pens as single items rather than in packs of five.'
- 'Have you ever thought of having some quiet music playing while shoppers browse? It's always very quiet.'
- 'I think our team is working well, but perhaps we can use everyone's skills more.'

This type of feedback is useful because it might highlight something your organisation has not thought about before.

### Surveys and questionnaires

In many instances organisations specifically ask customers to provide feedback to them in the form of surveys, questionnaires and customer satisfaction cards. This is often the best way of finding out what customers really think about your organisation.

- A card might be included with each product, asking customers what they think of the product they have just purchased.
- A questionnaire might be distributed after a conference, seminar or training session the organisation has presented to see what people liked, what they didn't like and what could be done to improve future sessions.

**Website responses**

Many organisations give customers the opportunity to provide feedback via the organisation's website.

- Survey forms are often sent to customers to research their satisfaction with the service the organisation currently provides, their expectations and suggestions they have for improvement.
- Some surveys might be conducted over the telephone.
- Some organisations ask customers to complete a customer feedback card to identify how well they think the organisation handled the feedback they gave.

**Focus groups**

Some organisations run focus groups to gauge customers' opinions on a range of topics. Selected customers meet to discuss products and services in a non-threatening environment, while their observations and suggestions are observed and documented by a market researcher or a member of the organisation.

## Complaints and criticisms

The most common forms of feedback received from customers (both internal and external) are complaints and criticisms. These will depend on the type of goods and services your organisation offers.

Some feedback may be extremely serious. For example, your organisation may be accused of neglecting workplace safety, of harassment, or of not providing equal opportunity. These are important matters that need to be referred to those with experience and expertise in these areas.

Common complaints and criticisms may include:

- faulty products
- poor client service
- poor response to information request
- administrative errors, such as incorrect invoices
- warehouse or distribution problems
- general workplace conditions, such as lack of lighting
- incorrect descriptions of products
- slow delivery or delivery errors
- repeated complaints from the same client
- service errors, such as the poor quality of a repair
- system errors such as late mail distribution
- limited access and equity standards.

## Recognise and handle customer feedback

An organisation's image and its relationship with its customers can be influenced by the way it handles the feedback it receives. Listening, understanding what the customer is saying and responding promptly are essential aspects of this. For example, an immediate and polite response to a complaint or criticism lets the customer know that you value their point of view and are keen to satisfy them. Ignoring feedback or believing the customer is wrong could be damaging to the organisation.

### Treat customer feedback seriously and professionally

Keep in mind why it is essential that all feedback your organisation receives is taken seriously and is handled sensitively, courteously and promptly. If you treat the feedback you are given in a professional manner, you will make a difference and keep, rather than lose, that customer.

### Follow up informal feedback as soon as you receive it

In many instances you will need to refer it to an appropriate person, such as your supervisor, a colleague or a person in another department. In the case of an email containing feedback, you may need to forward it to the relevant person.

### Recognise different types of feedback and handle appropriately

Learn to recognise all the different types of feedback that come into the organisation or that you receive from colleagues, and know the best way to handle them. All customer feedback should be recognised promptly. Follow any procedures that have been set down for staff to follow. There may be guidelines as to how quickly you are required to respond to customer feedback.

## Approaches for handling complaints

Your role in handling feedback is very important. In fact, each staff member has a responsibility to make customers feel that their comments are welcome and will be listened to.

Approaches for handling customer complaints:

- Speak to the customer in person.
- Treat the customer with genuine empathy, courtesy, patience, honesty and fairness.
- Tell the customer how you will handle the complaint, what will happen next and when.

- Investigate the situation before you speak to the customer (if possible) by checking records or speaking to a colleague.
- Don't jump to conclusions, lay blame or become defensive.
- Negotiate solutions that are to everyone's satisfaction.
- Thank the customer for raising their complaint with you and show them that you understand.
- Respond to the complaint promptly.
- Listen intently and ask questions to clarify and summarise.
- Keep the customer updated on progress and act quickly on promises

## Handle serious complaints

When developing a complaints handling policy, an organisation must consider its legal, ethical and personal business commitments to ensure the organisation's rights and responsibilities are understood when dealing with serious complaints.

A customer may report a very serious fault that has caused someone injury, has legal implications or relates to complicated financial matters. Or perhaps the complaint comes from a major customer and needs to be handled sensitively.

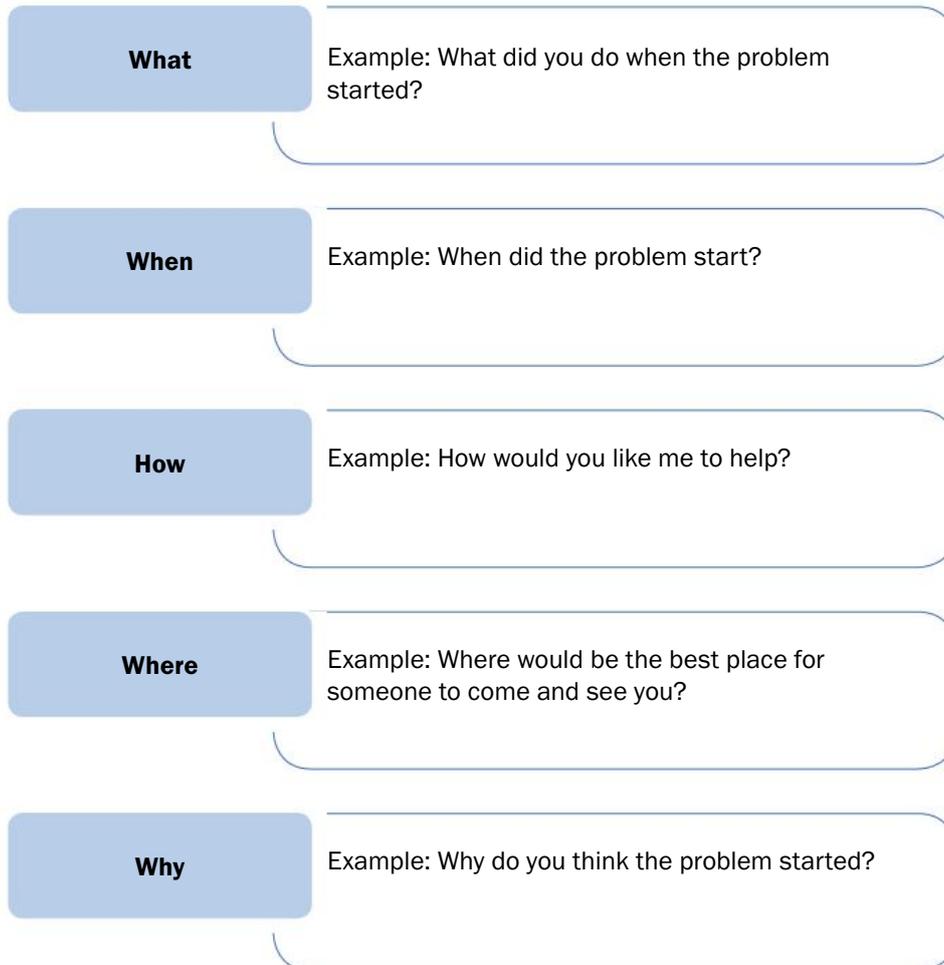
Serious complaints will have to be referred to a senior person, such as the customer service manager, a supervisor or the executive director. You may need to be given precise instructions that explain what to do in serious situations. This means you need to know the type of complaints you are able to solve. Your responsibility will probably be limited.



## Ask the right questions

Encourage customers to explain the problem and what they would like to happen; don't rely solely on the complaint form information. Ensure that you clearly understand the complaint.

Use questions that start with what, when, how, where and why.



## Apologise

Apologise sincerely for any inconvenience caused. Even if the customer's complaint is not justified, make a good impression by showing concern. Your supervisor will be able to help you with some standard phrases to use when apologising.

Some standard phrases to use may include:

- I'm terribly sorry for the inconvenience.
- Thank you. This issue has made me quite upset.
- I'm sorry this has upset you. I understand what you are saying.



## Follow organisational procedures

Dealing with feedback promptly and courteously is crucial to an organisation's success. Most organisations have policies and procedures for handling customer feedback. It is important that you understand and follow the procedures so you can develop and maintain a productive relationship with all of your customers, both internal and external to the organisation.

Policies and procedures assist you to respond effectively to feedback, showing the customer that the organisation is serious about the feedback received and is keen to resolve any difficulties. Customers will know that you will follow up promptly and that you care about their concerns. This will encourage the customers to continue doing business with your organisation. Remember, how you respond to feedback reflects on the organisation's image.

Some organisations have formal, documented structures in place while others will deal with the information informally through discussions and meetings. Organisational procedures in your workplace may include specific guidelines for receiving, handling and responding to customer feedback.

### Take responsibility

Should you deal with the feedback yourself? Find out what type of feedback you have responsibility for. It may be answering routine requests, following up a complaint, collating feedback forms or letting the customer know what is being done.

### Refer feedback

Should you refer the information to someone else in the organisation? Find out when you need to refer feedback to someone else. You may need to refer a query or serious matter to a colleague with specific expertise or responsibility.

### Respond appropriately

Are there procedures for the way you must respond? For example, you might have to telephone regular customers with a personal apology if they have complained. If a customer asks you to change the spelling of their name, you might need to give the correct details to the person responsible for updating the database.

### Follow up

Do you need to send the customer anything, such as a letter or a free product in response to their feedback? For example, you may be required to send a thank-you letter to every customer who completes a survey or compliments the organisation. You may need to send a free gift or give a customer a discount if they have experienced poor customer service.

### Know time lines

Is there a policy stating the time frame required for responding to a customer? For example, all emails must be responded to within 24 hours or all feedback must be dealt with within five working days.

### Follow procedures

Are there administrative procedures to follow? For example, all correspondence must be on the organisation's letterhead; always have your manager sign a letter to a customer who has complained.

### Use the feedback

Are there opportunities to discuss the feedback and identify where improvements should be made? For example, will your team leader hold a meeting to discuss specific feedback? Do you need to prepare a report for your manager to describe a particular customer complaint?

### Communicate effectively

The most important aspect of dealing with feedback is communication. Your organisation may have developed specific instructions on how to reply, the manner to adopt and communication techniques to use. These might be contained within a customer service charter.

## Example: the customer service charter

Item	How will we do this?
Respond promptly, appropriately and accurately to feedback	<ul style="list-style-type: none"><li>• Thank the customer for the feedback.</li><li>• Resolve the customer feedback if it is within your role and responsibilities.</li><li>• Refer the customer to the appropriate person or department when relevant.</li><li>• Complete and sign a customer feedback form and refer to your manager.</li><li>• Use company letterhead for all correspondence.</li><li>• Send the customer a follow-up letter after the feedback has been recorded and action taken.</li></ul>



## Practice task 14

1. Consider the different types of customer feedback provided in this table. How would you respond to each item of feedback?

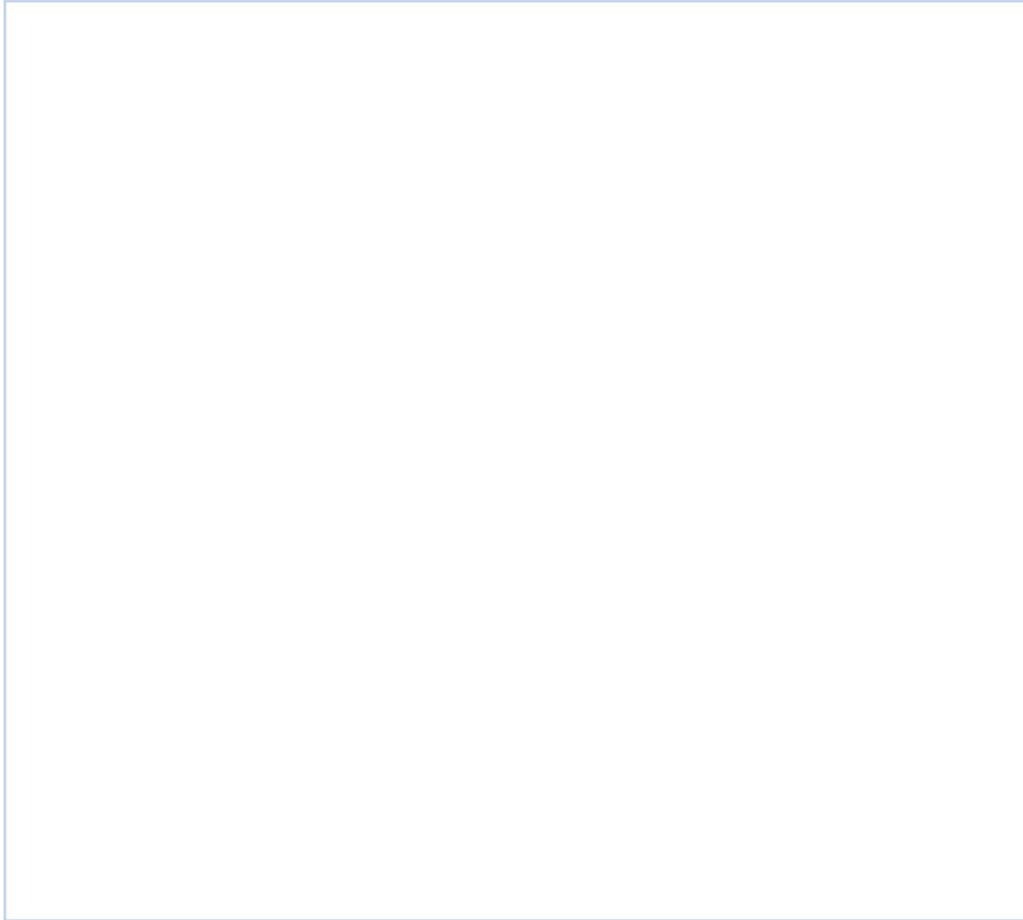
Type of feedback	Example	Response
Compliments	'I really appreciate the effort you put into making sure I received the goods in time.'	
Complaints	'I'm always kept on hold when I call your organisation.'	
Advice and suggestions	'Will your organisation introduce payment online? It would be so much easier for me.'	
Criticism	'Your products are far too expensive.' 'Every other store I know offers after-hours delivery.'	
Testimonial	'Toby's Tyres always provides top class service – and the best tyres in the business. I'd never go anywhere else.' Mr Blake Fewster, Milltown	
Surveys, questionnaires	A feedback form completed by a participant at a seminar.	

2. Think about a time when you have received feedback from a customer. Outline who the feedback was from and whether it was positive or negative.

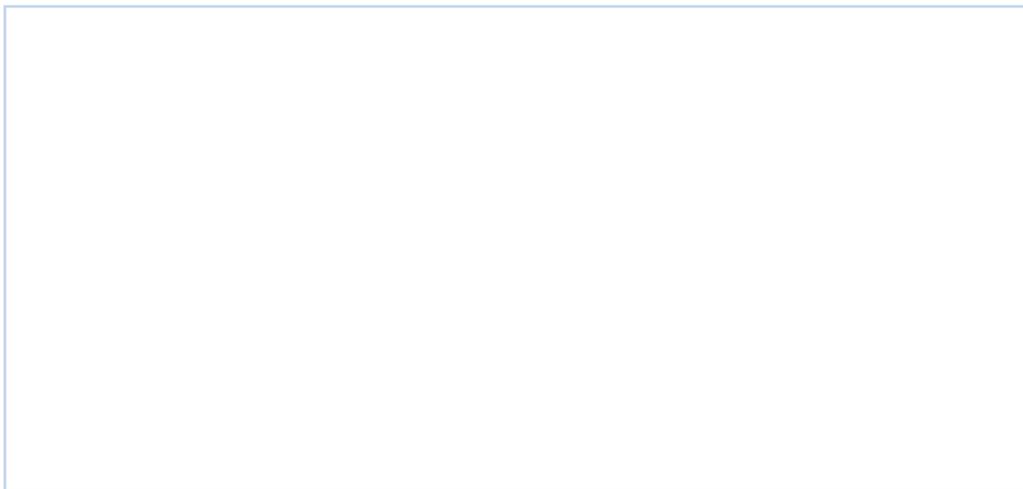
*continued ...*

*... continued*

3. List three examples of positive feedback and three of negative feedback.



4. Describe how you would handle a customer who is complaining and upset.



## 4B

### Record accurate feedback and communication between customers and the organisation

Some organisations have specific customer satisfaction or complaint forms that make it easy for them to keep accurate records of what their customers are telling them. However, some organisations rely on the informal notes taken when a customer calls to discuss a problem or present a compliment.

Regardless of the manner in which the feedback is collected, the information must be clearly and accurately recorded. In some instances, the feedback may relate to a matter that must be followed up by an external agent such as the police, a work health and safety officer or a lawyer, so it is essential that the information gathered is correct, documented clearly and easy to understand. Such records form an important part of an organisation's operations.



#### Keep accurate records

There may be serious consequences if accurate records are not kept. For example, if a customer sues your organisation or a customer has injured themselves on your premises, you will need accurate records. Documented evidence may include the customer's statement, witness statements, photographs and your organisation's response. All evidence must be clearly labelled and filed.

Even if the consequences do not relate to a legal issue, poor record keeping can lead to a dissatisfied customer who may take their business elsewhere. Keeping records of customer feedback is important so the organisation can identify if any patterns are occurring; that is, if the same type of feedback is being given by a number of customers.

Sometimes, an organisation may receive a number of complaints about a specific situation. For example, an external courier service the organisation uses may continually deliver products late. Customers complain and each complaint is documented. By keeping track of the complaints, the organisation can see how its image is being damaged by the courier company.

Keeping accurate records can:

- help resolve the customer's concerns promptly
- be a useful record of what has been done to assist the customer
- identify where an organisation is performing well
- identify where an organisation needs to improve its performance
- be useful if the matter needs to be followed up by external personnel
- contribute to a good relationship between the customer and the organisation.

## Record complaints

Your organisation may have a general complaints form to be completed or a number of different complaints record forms to be filled out, each one relating to a specific type of complaint. Alternatively, individual departments may record different details.

The recording system could be paper-based, in which a form or notebook is filled in by hand, or details could be entered directly into a computer that has electronic forms to fill out.

Be sure to note if the feedback needs an urgent response. In some cases, you may need to contact the appropriate person straightaway and clearly explain the situation to them. For example, if a complaint is made about a slippery floor surface in the entrance to your office, you might contact your organisation's work health and safety officer, explain the nature of the call and transfer the customer to them. Describe the situation so the person you are talking to has enough information to deal confidently with the customer.

Whatever the complaint is, the details must be recorded accurately so that:

- people know what has happened
- the complaint can be referred to later
- the complaint will not be forgotten
- proof of dates, details and actions are available (especially important for serious complaints).

## Example: using a customer complaints form

A customer complaints form might look like the following example.

Customer complaints form	
<b>Date:</b> 3/10/16	<b>Received by:</b> (Officer's name) Josh Leyton
<b>How received:</b> <input type="checkbox"/> Visit	<input type="checkbox"/> Email
<input checked="" type="checkbox"/> Telephone	<input type="checkbox"/> Fax
<input type="checkbox"/> Letter	
<b>Customer name:</b> Mrs Evelyn Guthridge	
<b>Organisation:</b> -	
<b>Organisation/home address:</b> 25 Bedford Parade Barton QLD 4065	<b>Contact details:</b> Phone: 07 1111 0000 Fax: - Email: -
<b>Invoice number:</b> 32100	<b>Order date:</b> 28/9
<b>Product/service:</b> Galvanised iron garden shed Model FA32	
<input type="checkbox"/> Missing goods	<input type="checkbox"/> Overcharged
<input type="checkbox"/> Damaged goods	<input type="checkbox"/> Wrong goods delivered
<input checked="" type="checkbox"/> No discount given	<input type="checkbox"/> Service not as specified
<b>Additional information:</b> Customer said an agreement was made to receive a 15 per cent discount.	
<b>Immediate action:</b> Told customer we will investigate. Thanks for calling. Will get back as soon as possible. Read file for record of transaction.	
<b>Further action required:</b> Contact customer with result.	
<b>Customer service officer:</b> J Leyton	

## Record informal feedback

Informal feedback is received from a customer face-to-face, over the telephone or in an email, rather than through a formal process. It is a good idea to get into the habit of keeping a notepad and pen near you at all times. This makes it easy to record any conversation you might have with a customer.

Ensure you record the correct spelling of the customer's name, organisation and contact details. Don't be afraid to ask them to repeat anything that is not clear to you. If you use any personal shorthand, for example 'cus' for 'customers', be sure you write the word fully when you are typing up your notes. Other people may not know what you mean. Use your listening, speaking and questioning skills to identify and clarify the information.

If there is no official form for the type of feedback you are recording, write up your notes in full as soon as the conversation has ended.

You should record:

- the customer's name, spelt correctly
- their organisation (if applicable)
- their contact details
- the date
- the customer's feedback
- your response
- the action/s you will take.

## Transfer the information

Depending on your organisation's policies and procedures you might have to transfer the information to a specific feedback form, an online form or a database. Some organisations use a software program that includes a section to record customer comments. Some feedback forms may be coded so the organisation can identify different types of feedback.

Some people prefer to record the essential facts as they are speaking with the customer, then transfer the information into the official form as soon as the conversation has ended. By doing this straightaway, the conversation is clear in your mind. It is easy to forget something if you decide to have a coffee break first or if someone comes to talk to you. Trying to rely on your memory can be risky. It is also preferable to type the feedback, as handwriting may be difficult for other people to read.

## Record formal feedback

Formal feedback is when someone follows a defined procedure to give you feedback. Some organisations have a customer satisfaction form on their website. Sometimes feedback sheets or cards are used.

How you deal with feedback documents depends on your role in the organisation. Completed surveys, questionnaires and customer satisfaction forms need to be collated and read, and appropriate action needs to be taken. It may be your job to enter the details from any feedback forms into a database or onto another form. You may need to pass them on to a colleague or your supervisor who will analyse the information and prepare a report. It may be your role to monitor the number of responses the organisation receives electronically and the type of feedback that is sent.

### Surveys

Surveys are easy to set up, send out, analyse and scale. Organisations may create long or short surveys that ask purposeful open-ended questions. Surveys may be accessible online or in print form.

### Feedback forms

Feedback forms make it easy for customers to notify an organisation when something isn't working quite right. Customer feedback forms may be online, or could be located in print form at an organisation's reception area to make complaints or suggestions. When you receive customer feedback forms, check that all sections have been filled in. Often an organisation gives customers the option of whether they wish to include their name or not.

### Online user activity

Organisations can record formal feedback using website analytics software. By looking at the activity of individual website users, an organisation can identify the reason why certain outcomes occur.

### Reaching out directly

Reaching out to customers directly through telephone interviews, focus groups or live product reviews allows an organisation to discover contextual information that cannot be accessed using surveys or analytics information. It is best practice to do this in person so that the customer can explain their thoughts, feelings and concerns about a particular product or service.

## Example: customer feedback form

### Jennings & Sons

#### Customer feedback form

Your comments are important to us. Please email/fax the completed sheet back to us on jenningsandsons@gmail.com.au or 08 1010 2020, or use the postage-paid envelope enclosed.

**Name:** Gloria Tranng

**Organisation:**

**Address:** 34 Wattle Street, South Field

**Telephone:** 5555 1111

**Fax:** 5543 1212

**Email:** gtranng@btmail.com.au

**How did you hear about our Wizard Weeder?** In the Winter Catalogue/dropped in letterbox

**Was the Wizard Weeder easy to order?** Yes

**Was the Wizard Weeder delivered on time and in good condition?** Yes

**Does the Wizard Weeder meet your needs?** Yes

**Have you any suggestions for improving the Wizard Weeder?** I'd like it to come in more colours – especially silver

**Are you happy with the customer service you received; for example, do you have any suggestions on how we could improve our ordering or distribution processes?**  
I'd like delivery to have been quicker – four days seems a bit much for an inner-city delivery.

**Further comments:**

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## Example: customer's reaction to a training session

### Executive training

#### Using email as a business tool

We welcome your comments about our training program. Please take a few minutes to complete this evaluation form. The information you provide will help us continue to offer the highest quality professional-development programs.

**Name:**

**Organisation:**

**How did you hear about the training program; for example, from a flyer, by email, through the company's newsletter, from a colleague?**

---

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**Did the presentation provide you with the information you needed?**

---

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**What other issues do you think should have been covered?**

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**Were the exercises given useful in helping you learn how to implement an email policy?**

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**Was there sufficient opportunity for you to practise the skills?**

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**Were there sufficient opportunities given for discussion, questions and answers?**

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**Please comment on the venue, parking, location, facilities and cost.**

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**Thank you for taking the time to complete this evaluation.**

## Record other types of information

There may be further types of evidence or information you need to record.

These may include:

- a work health and safety report
- a witness statement
- a police report
- signed affidavits
- photographs
- copies of relevant legislation
- taped records.

## Taped records

Taped records are very important as these might be required in a legal matter.

All tapes should be clearly labelled with:

- the date and time of the interview
- who was being recorded
- who was also present at the recording
- what matter was being discussed.

## File feedback information

Customer feedback is no use unless it is put into some sort of system that will ensure it ends up with the right person, and doesn't get lost. Organisations differ in how they organise this information. Some keep a paper-based filing system, others rely on an electronic system, and some will use a combination of both.

The two most important things to remember are:

- all records must be kept
- records must be stored for easy access.

In addition to the records of conversations, complaint forms and satisfaction cards, there may be other relevant material that needs to be filed. This might include witness statements, examples or photographs of what the customer was referring to, or signed documents from someone external to the organisation, such as a lawyer or police officer. These may need to be stored in a locked confidential file.

## Practice task 15

Read the case study, then answer the questions that follow.

### Case study

Tenille was delighted when a new customer telephoned to place an order for some goods and then complimented the organisation on the quality of its products.

'Thanks,' Tenille said. 'It's always nice to receive a compliment like that, and it helps to know our customers are satisfied.'

Tenille knew that it was important for the organisation to know about this. Customer complaints were recorded on a special form, but there was no procedure for dealing with compliments. Everyone just said 'Thanks' to the customer and left it at that. Tenille decided to write down the customer's name, what they had purchased and what they had said and hand it to her manager. She thought the manager might like to let everyone know so they could share in the positive feedback.

Tenille also suggested to her manager that the organisation should keep a database for recording positive comments.

1. Why is it important to record positive feedback?

2. List the three types of formal feedback and three types of informal feedback that an organisation should record and file.

3. Why is it important to record taped conversations?

## 4C Identify any unmet customer needs

After you have recorded a customer's request, you need to know if your organisation can or cannot meet the customer's needs. To make sure you understand exactly what the customer has asked for, use your communication skills, ask them appropriate questions to determine exactly what they are asking for and clearly explain what you can offer. In this way you will be able to identify precisely what they want.

It is important to keep a record of all requests. Management may wish to consider the request and see if it is something they can offer in the future. If management receives a number of calls requesting after-hours delivery in the evening, they may investigate the feasibility of introducing such a service.

### Example: ask the customer questions

A customer contacts Barry's Barbecues and asks if they deliver after 6.00 pm because that's the only time someone will be at home to take delivery. Jade, the customer service officer, explains that their last delivery is 5.30 pm.

But instead of hanging up, Jade continues to ask the customer questions to identify exactly what they want. The answer: they want the barbecue delivered when they are home.

So Jade explains that Barry's Barbecues has an early delivery starting at 7.30 am. The customer says that this is suitable, but emphasises that they must come exactly at this time.

While in this case, the customer's needs were able to be satisfactorily met, the sale would almost certainly have been lost if the officer had simply hung up after the initial query. By questioning the customer to identify what they really wanted, the officer was able to offer an alternative time which met their needs.



## Examples of unmet needs

You may realise an opportunity to satisfy some unmet needs of customers. By identifying these unmet needs, you give your organisation a chance to increase their business.

Some examples of unmet needs that you may encounter in your organisation are described below.

Unmet needs	Example
An organisation may not be able to meet a customer's specific request	City South Medical Centre could not make an appointment for a customer at the time they asked for. Telcard's HR officer was not available when the customer wanted to see her.
An organisation may not be able to provide the service the customer has asked for	Barney's Discount Store tells the customer that it does not provide home deliveries. Charley's Cash-n-Carry explains that it does not offer online purchasing.
An organisation may not be able to supply the product the customer has asked for	Blakes Management Training does not offer a course in financial management at diploma level. Adama's Cafe does not have gluten-free products.
An organisation may not be able to supply the product the customer needs at the time they require it	Fareena's Furnishings cannot deliver a lounge suite the next day when the customer wants it as they are waiting on supplies from the manufacturer. Marina's report will not be ready for her manager until the end of the week.
An organisation may not be able to supply the quantity of products they require	The Perfect Office, a small office supply shop, does not have sufficient quantities at present to meet a large bulk order.
An organisation may not be able to offer a refund	The conditions of the items on sale at Home and Hearth clearly stipulated 'no refunds available'.
An organisation may not accept returns	The notices displayed prominently in Jewels Boutique say 'select with care. No returns accepted.'
An organisation may not be able to provide a free product	Precious, a small gift store, cannot afford to give away free products.

## Your responsibility for dealing with unmet needs

Understand the level of responsibility you have in your job role.

Your organisation will have specific policies and procedures you must follow. Remember, your knowledge of the roles and responsibilities of staff will help you identify the most appropriate person to assist the customer.

### What are your responsibilities for dealing with unmet needs?

Can you advise and recommend alternative products to customers?

Can you initially suggest alternatives, and then ask the customer if they need to talk to anyone else?

Are you only responsible for recording customer contact details and the request they have made when they contact the organisation?

Do you need to refer the customer to someone else in the organisation who will be able to explain more fully what your organisation can offer?

Can you refer the customer to another company if what they have asked for is not provided by your organisation?

## Provide options to meet unmet needs

Always consider other ways of dealing with unmet needs, such as other arrangements that you can offer. Sometimes your suggestions may still not satisfy the customer, but at least you will have shown your readiness to do all you can to help them.

Below are examples of how you can offer alternative suggestions to the customer.

### Unmet needs

1

**You can't supply the product the customer needs at the time they require it.**

Option: 'I'm sorry, our delivery timetable is absolutely full on Monday. However, we will put you as our first delivery on Tuesday.'

2

**You can't arrange a meeting with the person they requested.**

Option: 'I'm sorry. Angie is on holiday. But Ben is taking over her clients and he'll be happy to see you straightaway.'

3

**You can't accept returns.**

Option: 'Although we don't accept returns on sale items, we can give you a discount on a similar item.'

4

**You can't visit a customer.**

Option: 'I'm sorry. We don't have a representative in your state. Please visit our website and let us know if there's anything you don't understand. We have a list of frequently asked questions. I'll send you our catalogue and price list as well as a sample product.'

5

**You can't give a refund.**

Option: 'I'm sorry. We're unable to give you a refund, but we can credit your invoice with the amount and it will be deducted next time you make a purchase.'

## Provide options

Sometimes, the customer may not be aware that there are other product or service options available, so it is up to you to let them know the full range of your organisation's products and services. You could save a loss of sales if you discuss how other products or services could be just as suitable for meeting the customer's needs as the original product or service they requested.

You should have a clear understanding of what your organisation offers. Keep a copy of your organisation's products and services catalogues, brochures, flyers or handouts near you whenever you are in the workplace. You will then have detailed information to refer to.

For example, if a customer provides feedback that the model you have suggested is far too expensive, you might suggest they purchase the basic model that is cheaper, but is good value for money and meets their needs.

You should be familiar with:

- the features of the products and services such as purpose, size, colours, attachments, models and cost
- the benefits of the products and services such as how they service will help the customer
- options such as different packaging options, special offers, add-ons and extra services
- payment options such as credit card, cheque, cash, money order, payment on delivery and direct debit
- new products and services that the organisation has just released.

## Suggest alternatives

Remember that customer service is not about advising a customer to purchase the most expensive product or the deluxe service. It is about offering what is most suitable to meet their needs. If the customer has already let you know that the product or service is too expensive, the payment option is not suitable or the product does not meet their needs, it is up to you to suggest alternatives.

Keep in mind what their objection was. For example, if they have said that the product is too expensive, don't offer another equally expensive product as an alternative. When suggesting an alternative, spend time discussing with the customer exactly how the product or service you are suggesting will meet their needs. You don't want to push them into a purchase only to have them complain later that the product or service was not at all suitable for them. If this happens, the customer is unlikely to return to your organisation.

Ways of suggesting alternatives include:

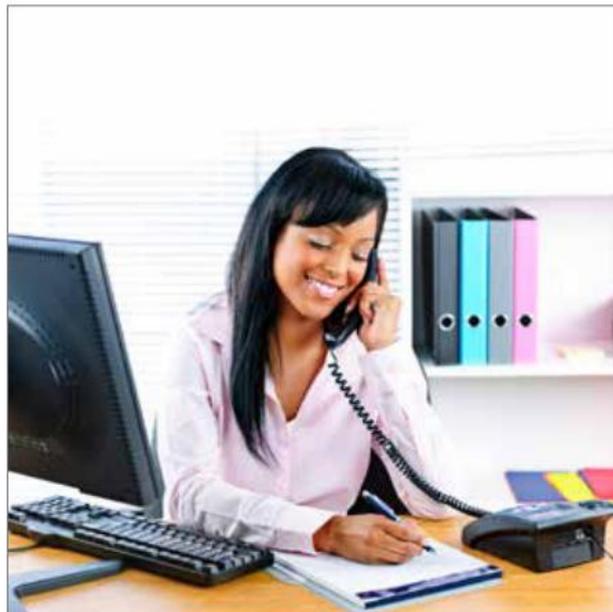
- advising the customer about cheaper options
- explaining the differences between the basic and advanced models
- explaining the differences between the types of service offered such as standard, premium and deluxe
- describing the choices available such as colours, sizes, automatic or manual, attachments and payment options
- suggesting the customer consider a newly released product
- recommending more appropriate arrangements such as purchasing a one-year licence, buying individual items instead of sets or paying by instalments.



### Example: consider the needs of internal customers

Caroline is responsible for making the car hire arrangements in her organisation. One of the managers has asked for a specific model with particular features. The car hire firm advises her that this is unavailable. Instead of accepting this, Caroline asks them to fax her a list of suitable alternatives. She records the options available and then provides the manager with the list from which he can choose an alternative hire car.

Caroline used her initiative to resolve what could have been a frustrating situation. Train yourself to think of different ways of resolving difficulties.



## Provide explanations to the customer

You may not be able to satisfy all customers. But this should not prevent you from giving them good service.

Often the customer will be disappointed when you tell them you cannot meet their needs. Most customers will accept what you say, but some may become angry or threaten the organisation with a lawsuit. The important thing to remember is to remain calm and be polite. Put yourself in the customer's position and be sensitive to their feelings.

### Remain positive

Be as positive as you can in your response to the customer. Explain clearly and in a steady voice why their needs cannot be met at that time. For example, if they have asked about online purchasing – a service your organisation doesn't provide – you may need to tell them that, while the organisation doesn't currently offer online purchasing, it has listened to customer requests and is in the process of introducing such a scheme.

### Communicate policies

You may need to draw the customer's attention to your policies. For example, 'I'm sorry we're unable to give you your money back but that was a condition of the sale. However, we could exchange the item for a similarly priced one if you would like.'

### Offer alternatives

You will not always be able to meet the customer's needs. However, as a rule, never respond by saying your organisation cannot meet their needs and end the conversation. Talk to them and see if there is another product or service that you do offer, or an arrangement that could be made that might suit their needs just as well. For example, you may not be able to get them an appointment for 2.00 pm but you can give them one for 4.30 pm and tell them that you will contact them if there is a cancellation.

**Apologise**

Sometimes there will be no alternative other than to apologise and tell the customer that you cannot meet their immediate needs.

## Practice task 16

1. Collect four examples of feedback from your organisation that indicate that there is an unmet need. If you are not in the workforce, collect examples from an organisation you are familiar with. You could also research different organisations on the internet and discover unmet needs recorded in customer testimonials.

For each example obtained, list the actions you could take to meet the customer's needs. Record your answers in this table.

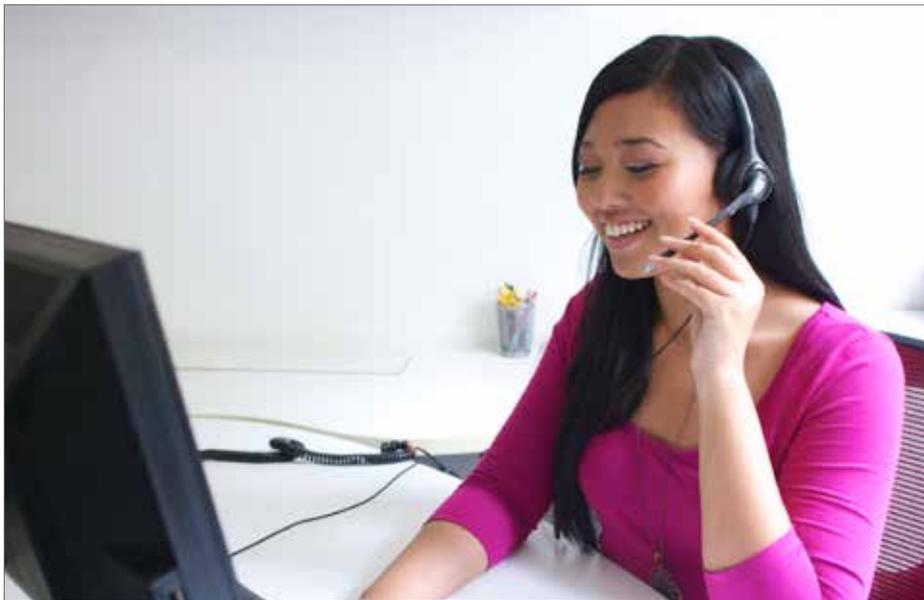
Example	Unmet need	Actions taken to meet customer's need

2. Consider what might happen if you suggest an alternative product to a customer without explaining that it attracts additional delivery charges. Describe the consequences of this, including:
  - What might the customer do?
  - What impact will this have on the organisation now and in the future?
  - What should the organisation do to make sure this never happens again?

## 4D Assist customers to make contact with other services

To encourage good customer relations and to ensure the customer will return to your organisation, explain clearly why your organisation cannot meet their needs and then suggest ways to help them. For example, you might give them the name of another company you know that specialises in the product or service they want or the information they need. Helping customers in this way will ensure they think well of your organisation so they will be more likely to return, even though you couldn't help them this time.

When recommending other companies, you should be aware of any policies and procedures that your organisation has about referring customers elsewhere.



## Practice task 17

1. Have you ever contacted an organisation and been referred to another organisation, department, or somewhere else?

2. If so, did you feel grateful to this organisation for helping you, even though they couldn't supply you with what you wanted?

3. Did you continue to do business with the organisation?

## Summary

1. Customer feedback should be promptly and sensitively dealt with.
2. Customer feedback may come in many forms, including suggestions, complaints, requests or compliments.
3. Customer feedback is important to the success of a service-oriented organisation.
4. Recognising and accurately recording customer feedback allows unmet needs to be promptly dealt with and other products or services to be offered to the customer.
5. An organisation may not be able to provide the service or product and may refer the customer to another organisation.
6. The organisation's policies and procedures must be understood and adhered to when meeting unmet customer needs.

## Learning checkpoint 4

### Process customer feedback

This learning checkpoint allows you to review your skills and knowledge required to process customer feedback.

#### Part A

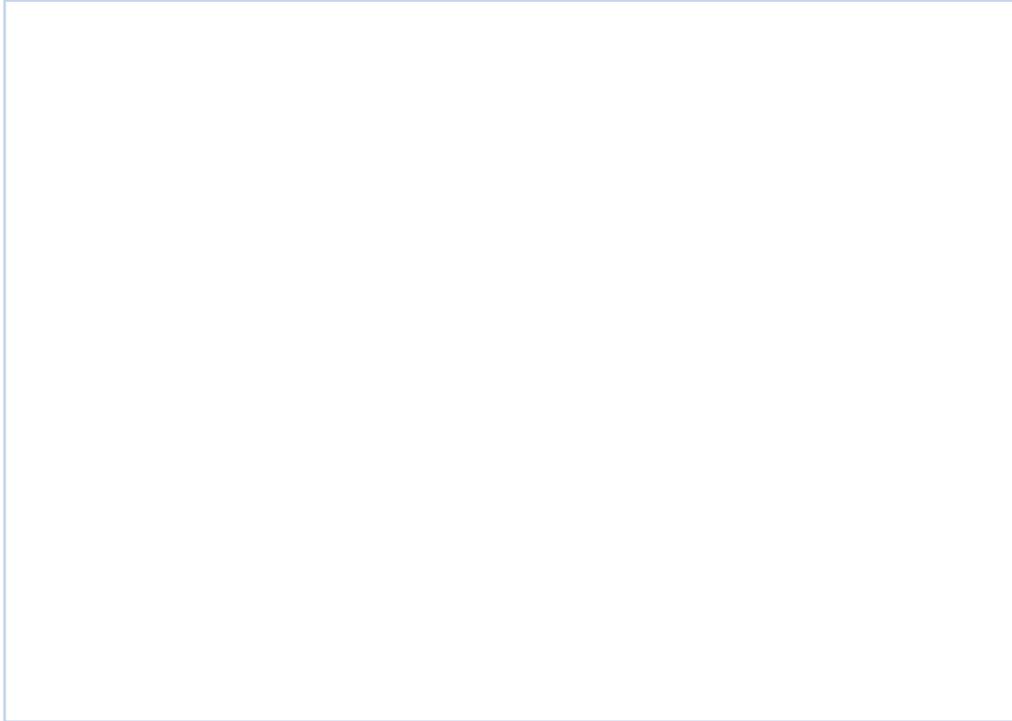
1. Explain what you understand by the term 'customer feedback'.

2. Why do you think customer feedback is important to an organisation?

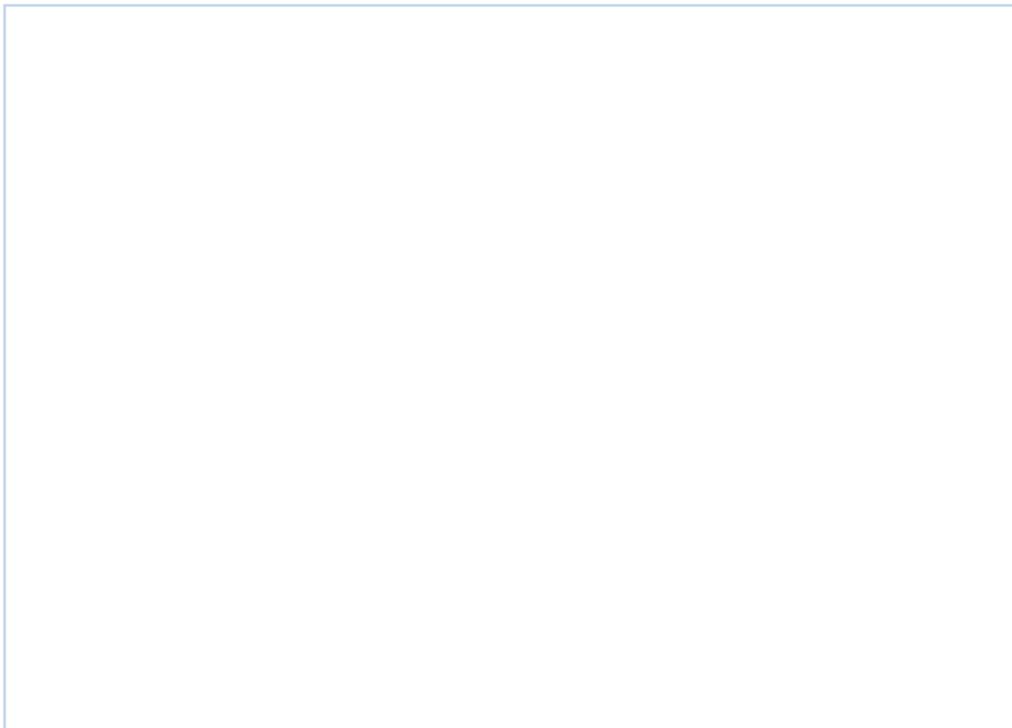
3. Complete the following table.

Situation	Type of feedback	Most appropriate method of response	Why you chose that method
'I'm amazed at being kept on hold every time I ring.'			
'You've got to make sure you plan your work better. This is the second occasion you haven't completed work on time.'			
'Thanks for advising me. You really understood what I was saying.'			
'Why won't your business accept cash? I don't have a credit card.'			

4. Describe how an employee would respond to a customer who calls their organisation to ask for a refund because they weren't satisfied with the product they purchased and want to return it. In your answer, mention any policy, procedure or legislation an employee needs to be aware of when responding to the customer.



5. Explain why it is essential to keep accurate and easy-to-read records of customer feedback. In your answer, mention what might happen if accurate records are not kept.



6. Select an organisation where you have been a customer. List the options you have when paying them. Describe the action you would take if you worked for that organisation and a customer tells you that they do not have a credit card.

## Part B

Read the scenarios, then answer the questions that follow.

### Scenario 1

You are a receptionist at Rent-An-Office, a company that specialises in leasing and hiring office equipment, furniture and furnishings.

Mr Byron McGill of 5/123 Avalon Heights telephones Rent-An-Office. He has recently used your company's services to establish a new office for his company Party Tricks. He is unhappy that some of the items he ordered were missing (a bookcase and two paintings) and his request for a 2.00 pm delivery was ignored.

1. Record the relevant information on a customer complaints form. You may use the following template or source one from your workplace, a book or the internet. You may need to add in further details such as the items that were ordered, the date, and so on.

### Customer complaints form

**Date:** \_\_\_\_\_ **Received by:** (Officer's name)

\_\_\_\_\_

**How received:**    Visit       Email       Telephone       Fax       Letter

**Customer name:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

**Organisation/home address:**      **Contact details:**

\_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_ Fax: \_\_\_\_\_

\_\_\_\_\_ Email: \_\_\_\_\_

**Invoice number:** \_\_\_\_\_ **Order date:** \_\_\_\_\_

**Product/service:**

\_\_\_\_\_  
\_\_\_\_\_

**Complaint:**

\_\_\_\_\_  
\_\_\_\_\_

**Immediate action:**

\_\_\_\_\_  
\_\_\_\_\_

**Further action required:**

\_\_\_\_\_  
\_\_\_\_\_

**Recommended:**

\_\_\_\_\_  
\_\_\_\_\_

2. Describe how Mr McGill's needs can be met.

### Scenario 2

You work for a small health retreat that offers a variety of services and a range of prices. They always try to meet the customers' needs. But sometimes a customer will want something that only a larger resort could offer.

One day, a customer telephoned and asked for a session on stress management, a massage and a yoga lesson. However, the company does not offer yoga lessons. You know that another company in town offers these but you don't want to lose the customer. You also know that you mustn't say anything to deceive the customer.

3. What action would you take to try to satisfy the customer? Include a discussion of the suitability of other products. Make a recommendation to meet their needs.

4. Explain how your recommendation was consistent with policies and current legislation. Mention any specific legislation your recommendation complied with.

