

BSB 7.0

BSBOPS203

**DELIVER A
SERVICE TO
CUSTOMERS**

BSBOPS203

Deliver a service to customers

Release 1

Learner Guide

Aspire Version 1.1



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Before you begin

This Learner Guide is based on the unit of competency *BSBOPS203 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.

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	These highlight key 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.
Summaries	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 provides definitions for each foundation skill.

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

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 Greet customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Share information with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Respond to customer requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Develop a rapport with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Identify customer needs	2A Ask questions to identify customer needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Identify urgency and service priorities	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Provide customers with information and options	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Assess limitations in addressing needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3: Provide service to customers	3A Confirm details of service and delivery	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Address problems and delays	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Improve service and products	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4: Process customer feedback	4A Seek and respond to customer feedback	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Record feedback and communication with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C Identify and address unmet customer needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4D Encourage customers to maintain contact with the organisation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Establish contact with customers

- 1A Greet customers
- 1B Share information with customers
- 1C Respond to customer requirements
- 1D Develop rapport with customers

1A Greet customers

The greeting you offer customers is extremely important because it helps establish the initial impression of your business or organisation. Your organisation may have policies and procedures that detail how customers are to be greeted.

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 key to good customer relationships. Every time an employee interacts with a customer, they are contributing to the customer's impression of the organisation.

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. A customer's impression of an organisation and the service it provides begins to be formed from the very first interaction with the customer – the initial greeting.

Greeting face-to-face customers

Customers should always be welcomed with a friendly, professional approach. Prompt customer recognition and attention to their needs should always be offered.

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

Often 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 to them personally or politely ask the customer to wait. When you have worked in an organisation for a while, you become familiar with customers who visit or call regularly. Greeting these customers by name will present a warm, professional image.

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.

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 10.00am.

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.

Greeting customers over the telephone

When talking with customers on the telephone it is important to speak clearly and use a greeting in line with your organisation's procedures.

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

When answering the telephone, 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 telephone.

Be clear and polite	Answer the telephone 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 want 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 want 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.

Organisational policies and procedures relating to customer service

Most organisations will have policies and procedures that detail customer service standards and practices. It is your responsibility to ensure you are aware of and work within such standards.

Organisations exist to meet the needs of customers, and successful organisations detail procedures and policies that ensure all employees are aware of how to make sure customer needs are met.

In customer-facing roles, part of your induction into the organisation will usually include procedures for dealing with customers. The policies and procedures are generally documented in a manual that could be available either in printed or electronic format. 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 or 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
- processes for providing refunds
- processes for dealing with complaints
- access, 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
- antidiscrimination and related policies
- responding to comments or queries via social media.

Legislative requirements

Legislation protects customers from unfair customer service practices. You should ensure you are aware of such legislation and always comply with requirements to protect yourself and your organisation.

All organisations must comply with legislation relating to equal opportunity, antidiscrimination, 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 customers give to an organisation is treated as confidential. Legislation requires you to show courtesy to all customers and to serve them in the order they have been waiting. You should always offer assistance to those who need it (e.g. the elderly or those with a disability), be patient, use clear communication skills and be sensitive to other people's cultures.

There are also laws and regulations that protect consumers from a variety of unscrupulous business practices. The Australian Consumer Law is contained in the *Competition and Consumer Act 2010 (CCA)*, also known as the Australian Consumer Law, or ACL, which exists to 'enhance the welfare of Australians through the promotion of competition and fair trading and provision for consumer protection'.

If you are dealing with the public, you should be aware of the requirement to be open and honest, and not to mislead customers by what you say or even by what you do not say. It should be noted that legislation makes no distinction between interacting with customers face to face, over the telephone, via email or social media. You should ensure that your interactions, regardless of how that interaction happens, meets legislative requirements.

Key provisions of the Australian Consumer Law and other relevant legislation are described in the table below.

Australian Consumer Law (<i>Competition and Consumer Act 2010</i>)	<p>The <i>Competition and Consumer Act 2010</i> details Australian Consumer Law, which:</p> <ul style="list-style-type: none"> ▪ protects customers from misleading or deceptive conduct or advertising by organisations ▪ upholds consumer product warranties and safety standards ▪ protects individuals from unconscionable behaviour (e.g. encouraging vulnerable people to enter into unsuitable contracts) ▪ details the requirement to provide reliable, accurate and complete information to customers ▪ details credit terms and payment conditions, such as lay-by and Afterpay.
Antidiscrimination law	<p>Antidiscrimination law makes it illegal to discriminate, treat people differently or deny access to services on the basis of attributes such as age, disability, race, gender identity, and sexual orientation. The federal legislation is as follows, but relevant state and territory legislation also applies:</p> <ul style="list-style-type: none"> ▪ <i>Age Discrimination Act 2004</i> ▪ <i>Disability Discrimination Act 1992</i> ▪ <i>Racial Discrimination Act 1975</i> ▪ <i>Sex Discrimination Act 1984.</i>
<i>Privacy Act 1988</i>	<ul style="list-style-type: none"> ▪ The <i>Privacy Act 1988</i> protects the privacy and personal information of individuals by: ▪ ensuring organisations only collect information needed to fulfil their service obligations ▪ defining how personal information is to be collected and stored ▪ defining how information collected may be disclosed.
<i>Work Health and Safety Act 2011</i>	<p>The <i>Work Health and Safety Act 2011</i> and relevant state legislation:</p> <ul style="list-style-type: none"> ▪ define the responsibility of organisations to provide a safe workplace for employees, customer, volunteers and visitors ▪ define the responsibility of workers to act in the interests of their own safety and that of others ▪ provide risk and reporting guidelines to prevent and address workplace incidents.

Practice Task 1

Question 1

Which of the following statements are correct? Tick all that apply.

- Customers should always be greeted in line with the procedures and standards defined by your organisation.
- Australian Consumer Law protects customers against being provided false product information.
- When working in a customer service role, it is essential to be familiar with legal and organisational requirements.
- Your initial contact and greeting helps form a customer's overall impression of an organisation.
- Normal customer interaction standards do not apply when liaising with customers using social media.

Question 2

Which of the following statements are key provisions of Australian Consumer Law? Tick all that apply.

- To protect customers from deceptive and misleading behaviour
- To protect vulnerable people against entering into unfair contracts
- To ensure all products in a category are sold at the same price
- To protect people from overspending on their credit card
- To ensure product warranties are upheld

1B Share information with customers

A key element of your customer service role is to determine what information should be provided to your customers. This can be determined by the nature of your role, the needs of your customer and your organisation's policies and procedures.

All customer-facing roles require that you share information with your customers. Key to doing this effectively is understanding what information to share with customers, being able to locate the information quickly and efficiently and sharing it in a manner that is suitable to the needs of your customer.

The information you share with customers will depend on the nature of your role and your organisation. Examples of relevant information are outlined below.

Typical information to be shared with customers includes:

- information about your products and services (e.g. product range, pricing, warranty information, options, purchase or booking information)
- information about your organisation (e.g. opening hours, policies, locations)
- information about their account or membership (e.g. account balances, monies outstanding, membership renewal dates).

Information sharing requirements

Information shared with customers must meet both the requirements of your organisation and the specific needs of your customers.

When sharing information with your customers it is important that the information is communicated in a manner that meets your organisation's requirements, but is also presented in a manner that is accessible and suitable to your customer. Considerations for effective sharing of information are outlined below.

Organisational policies and procedures

- How is the information to be shared (e.g. the use of company brochures, format or templates to be used when responding to written requests, the use of specific terminology and time frames for responses to customer enquiries)?
- What information is appropriate to share (e.g. personal information about clients, staff members, customers)?

Meeting customer needs	<ul style="list-style-type: none"> Is the information provided relevant to the customer's needs and wants (e.g. does it answer their question or solve their problem)? Does the use of specific terminology make the information hard to understand?
Can you provide a full response?	<ul style="list-style-type: none"> Do you need to refer the customer to another staff member to provide a response? Are you aware of legislative requirements applying to the topic?
Is the information accurate and current?	<ul style="list-style-type: none"> Is the information that you share correct and up to date as at the time that you provide the information? Are you providing information that is neither misleading nor false? Have you checked the source of the information to ensure it is reliable? Are you providing factual information only, and not personal opinion or the thoughts of other team members and customers?

Example

Providing travel information

Liam works in a travel agency and is helping a customer, Alan, who has an enquiry about travelling to Sri Lanka. Alan has provided Liam with details about his budget, the things he'd like to see and how long he wants to spend in Sri Lanka.

Liam's organisation's procedures state that all customers are to be given a brochure on the destination they are interested in, along with a written summary of pricing and schedule information.

Liam has prepared information for Alan and spoken with him about the itinerary Liam is proposing. In addition to the brochure and the written quotation, Liam has advised Alan about how the itinerary allows Alan to see all the things he wants to see. Liam has also detailed information about costs associated with making changes to the booking once finalised, travel warnings for the area and suggested insurance Alan may want to purchase.

Practice Task 2

Question 1

Draw a line to match the type of information with its example below.

» Product information

» Details of your business opening hours

» Organisation information

» Amount of money a customer owes

» Account information

» Brochure about an item you sell

Question 2

Which of the following are points to be considered when sharing information with customers?
Tick all that apply.

- Your organisation's policies and procedures
- The method of sharing information that is easiest for you
- Whether the information is presented in a manner the customer can understand
- Whether the information meets the needs of your customer
- Whether you can provide a full and informed response

1C Respond to customer requirements

Using interpersonal skills is essential when identifying and responding to customer needs. Interpersonal skills help us communicate and work with people in a manner that meets their individual needs to achieve the desired results.

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.

The use of interpersonal skills includes effective questioning so you can determine a customer's needs and the best way to respond to them.

Identifying customer requirements

Using a variety of question styles can help you determine the needs of your customers. Using open and closed questions allows you to narrow the options available to identify how you can best serve your customers.

Effective questioning skills will help you identify the needs, wants and preferences of your customers.

There are two kinds of questions: closed questions and open questions. Closed questions can be answered with just 'yes' or 'no', or other single-word responses. Open questions usually require a longer response and help you find out more as to why the customer is there.

You can follow this up by asking more questions until you have clearly identified what the customer needs.

Open questions	Closed questions
<p>Use open questions when you want to find out more information.</p> <p>These questions begin with the words 'how', 'why', 'where', 'what', 'when' or 'who', and they cannot be answered with just 'yes' or 'no'. An example of an open question is, 'What type of kettle are you looking for?'</p> <p>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.</p>	<p>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?'</p>

Interpersonal skills

Interpersonal skills are the communication, listening and interaction skills we use to identify and meet the needs of customers.

Interacting with your customers in a way that shows your interest in them and meets their communication needs is called using effective interpersonal skills. These skills include factors such as your spoken language and body language, listening carefully and demonstrating that you have understood what someone is saying and modifying your approach to meet the communication needs of the person you are speaking with.

Listening carefully to what your customer is saying is one of the most important parts 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 telephone call efficiently. Active listening ensures you understand what the customer is saying and minimises misunderstanding.

Interpersonal skills for effective customer service are outlined below.

Active listening	<ul style="list-style-type: none"> ▪ Show you are listening by smiling, nodding or, on the telephone, by using phrases such as 'of course', 'I understand', etc. ▪ Paraphrase, summarise and ask follow-up questions. ▪ Do not interrupt or make assumptions.
Use appropriate body language	<p>The following body language shows customers you are interested in them:</p> <ul style="list-style-type: none"> ▪ 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 leaning forward slightly, to convey a positive, welcoming manner. <p>You should also take notice of your customer's body language. They may have an angry look if they are complaining about something, or they may look puzzled if they do not understand what you are saying.</p>
Practice integrity and respect	<p>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.</p> <p>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.</p> <p>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.</p>

Responding to diversity

When working in customer-facing roles you need to be able to recognise and respond to the diverse needs of those you serve.

In 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.

When speaking with customers with special needs, you need to take their specific 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 do not; politely ask people to repeat what they have said.

Some other ways to take individual differences into account are listed below.

Display cultural 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 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 telephone 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.

Example

Hearing impaired customers

Gina works in a pet supplies store and is assisting a customer with selecting appropriate food for his new kitten. She has noticed that the client is wearing a hearing aid and has speech patterns indicating he may be hearing impaired.

The store is quite busy and there is music playing over the PA. Recognising that the store environment may make hearing difficult for the customer, Gina makes sure she is always facing directly towards the customer when speaking. She is also careful to speak clearly.

The customer has asked for advice regarding selecting food, bedding and flea medications for the kitten. Gina asks a number of questions about the age, sex and breed of the kitten and offers her advice based on the responses provided.

Practice Task 3

Question 1

List three examples of interpersonal skills used when identifying and responding to specific customer needs.

Question 2

Which of the following statements represent appropriately responding to the needs of customers from diverse backgrounds? Tick all that apply.

- Recognising cultural differences that apply to greeting members of the opposite sex
- Taking the arm of a blind person to assist them without asking first
- Speaking clearly and using simple language with a person who may not speak English fluently
- Assuming a wheelchair user will not be interested in sporting equipment
- Pretending you understand what the customer is saying so as to avoid embarrassment

1D Develop a rapport with customers

Effective customer service relies on being able to develop rapport with customers by showing them that you are interested in addressing their needs.

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

Benefits of building rapport

Building rapport encourages customers to feel valued and comfortable dealing with your organisation. By acting to build rapport you help to turn one-time customers into loyal supporters of your business.

Building rapport with your customers makes them feel that they are valued by your organisation. By going that extra mile to recognise, respond to and address people in a way that shows you know and value them is one of the most effective ways to ensure people become repeat customers or clients.

Building rapport with customers also benefits you in your customer service role. When customers feel comfortable with you and trust you to meet their needs, they are more likely to ask for you by name and come to you with their repeat business.

Benefits of building rapport

- Rapport builds trust and people want to do business with people they like, know and trust.
- By building rapport you are encouraging people to become return and repeat customers.
- Building rapport and providing individualised service means people will often refer their friends and family to you.
- Rapport allows people to feel comfortable expressing opinions and offering feedback to your business.

Tips for building rapport

Demonstrating empathy and showing that you are listening to understand a customer's needs helps build rapport and positive relationships.

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.

Building a good relationship with a customer also means doing a bit extra for them. Once you have established a good rapport, you can build on this using your interpersonal and communication skills.

Tips for building good rapport with customers

- Let the customer know that they can always contact you whenever they need information.
- Use verbal and non-verbal communication skills to tell customers that you are interested in their needs.
- 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.
- Show the customer you remember them the next time they make contact.
- Make a note of the customer's personal information, such as whether they are married. Include this in your conversations.

Example

Showing customers you are interested in their needs

Pet accessories store worker Gina has been talking with a customer, Andrew, about his new kitten. Andrew explains that he has never had a cat before and is a bit unsure about what is involved.

Gina asks Andrew lots of questions about the kitten and why he has decided to get one. Gina is not a cat lover herself, but nevertheless asks Andrew lots of questions about his new kitten and listens patiently as he tells her all about its funny behaviours. Gina encourages Andrew to talk by smiling and nodding as he talks and asking follow-up questions.

After his initial purchase of food, bedding and flea treatments, Andrew comes into the store a number of times and always asks for Gina by name. He has realised that the kitten needs a few extra accessories and knows that Gina will be able to help him. Because Andrew is hearing impaired, he is also confident that Gina will communicate with him in a manner that is appropriate to his needs.

Practice Task 4

Question 1

List three ways you can build rapport and show a customer you are interested in their needs.

Summary

- A customer's initial impressions of an organisation are largely shaped by the greeting they are offered. It is therefore important that you always offer a friendly and professional greeting to customers to your workplace.
- When greeting people on the telephone, be sure to answer their call promptly and use a greeting in line with your organisation's procedures. This typically includes the name of the organisation, your own name and a line such as 'How may I help you?'.
- Most organisations have policies and procedures that dictate how customers are to be greeted and served. You should ensure that you are familiar with the procedures, standards and policies that exist within your organisation.
- Australian Consumer Law and a number of other Acts set out requirements (at both federal and state levels) that determine how customers are to be served.
- When sharing information with customers, understanding what information is to be shared and how to share it is essential.
- The effective use of interpersonal skills is an essential part of successful customer service. Recognising the needs of your customers and responding in a manner that supports and recognises those needs demonstrates to your customers that they are important and valued.
- The use of a variety of questioning styles, such as open and closed questions, will allow you to effectively and efficiently determine your customers' needs.
- Good-quality customer service relies on building relationships with customers. Showing customers that you are interested in them and their needs allows you to develop rapport. Rapport and communication skills sees customers become repeat customers.

Learning Checkpoint 1

Establish contact with customers

Part A

1. Which of the following represent examples of organisational procedures and requirements that apply to greeting customers? Tick all that apply.

- Answering telephone calls promptly and stating the name of the organisation and your own name
- Greeting return customers by name
- When you are very busy, telling customers they need to be patient and wait
- Procedures for responding to customers who want to obtain a refund
- Procedures for greeting customers who have an appointment
- Ignoring customers if you are assisting someone else

2. Which of the following are key provisions of Australian Consumer Law and customer service legislation? Tick all that apply.

- Customer safety is protected under workplace health and safety legislation
- Customers are protected by product warranties and safety standards
- Prices of products must be equal across all retailers
- Advertising must not make false claims about products
- Customers are protected against impulse online buys

3. List three points to consider when sharing relevant information with customers.

4. Which of the following statements are correct? Tick all that apply.
- Maintaining eye contact and using friendly body language are important tools for developing rapport and establishing customer needs.
 - You should always seek advice from others if you cannot accurately answer a customer query.
 - It is not your responsibility to recognise and respond to the communication needs of people from different cultures.
 - Demonstrating empathy shows consideration for another's situation and needs.
 - Cultural differences affect individuals' verbal and non-verbal communication styles.

Part B

Read the case study below and answer the questions that follow.

Case study

Juliette is a customer service officer in a bank. Her role is to greet incoming customers and ascertain their banking needs. She then directs the customers to the service counters or asks them to take a seat while she sees whether the relevant team member is free.

An elderly male customer enters the branch and attempts to head straight to the service counters. Juliette intercepts the customer in line with the bank's policy and asks if she can help. She can see the customer is angry and agitated and not interested in talking to her. He reluctantly stops.

1. Which of the following actions demonstrate a desire to build rapport and show interest in the customer's needs? Tick all that apply.
- Listening patiently to the customer's concerns, using verbal and non-verbal language to show she's listening and understanding
 - Telling the customer she will get in trouble if he does not stop and tell her who he wants to see
 - Asking the customer whether he would like to take a seat while she finds the appropriate person to help him
 - Letting the customer go straight to the counter
 - Telling the customer that he has no right to be rude to her

2. The elderly customer tells Juliette that he wants to see the manager, Mark. Juliette knows that Mark is not in the branch today. What information should Juliette share with the customer? Tick all that apply.

- That Mark is not available today and asking whether someone else can help
- That Mark is not available and offering to take a message
- That Mark has taken the day off because his wife is unwell and asking whether the customer would like Mark's home number
- None, simply telling the customer to come back tomorrow

3. Juliette wants to try to resolve the issue for the customer rather than wait until the manager returns. Provide an example of both an open and a closed question Juliette could ask the customer to help identify his needs.

4. The customer decides he wants to write a note for Mark. Juliette offers him a pen but notices he is struggling to use it because he has arthritis. List two things Juliette could do in response to the customer's need.



Topic 2 | Identify customer needs

- 2A Ask questions to identify customer needs
- 2B Identify urgency and service priorities
- 2C Provide customers with information and options
- 2D Assess limitations in addressing needs

2A Ask questions to identify customer needs

Understanding how to effectively ask questions of your customers will allow you to quickly and fully understand their needs and how you may help them.

As we saw in Topic 1, active listening and questioning are vital skills when communicating with customers. These skills help identify the needs of the customer, so you can provide accurate and relevant information.

When receiving a request, listen carefully so you can 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.

Ask questions and clarify understanding

Sometimes the customer is not able to explain exactly what they want. Part of your role is to ask the right questions so you can provide the right information. This helps you identify the customer's need.

The use of interpersonal skills is important when establishing customer needs. Being patient, listening to what the customer is saying and using non-verbal language are important. Often a customer will want to explain the problem they are hoping to solve rather than talking about the need for a specific product. For example, a customer in a pharmacy may talk about wanting to solve a particular medical condition rather than requesting a specific product. By asking questions, listening to the customer's problems and using your interpersonal skills, you can build rapport and best serve the needs of your customer.

Using open and closed questions

Using a combination of open and closed questions helps you explore a customer's needs so that you can present options that meet with their specific requirements.

Using open and closed questions allows you to explore the customer's requirements so that you can identify their needs and provide customised, specific service.

Closed questions are those that can be answered with short, definite answers, such as 'Yes', 'No', 'Today', 'Tomorrow', etc. Closed questions are often posed as a choice between options; for example, 'Would you prefer me to telephone or email you with a response?'. Closed questions are often used to establish facts, to test understanding and to bring around a closure to a discussion, which is particularly useful in a sales situation; for example, 'Are you happy to proceed with the booking?'.

Open questions usually require a longer response and are often used to determine feeling and opinion. They usually ask someone to think about their response or to expand on a response to an open question; for example, 'Are you being attended to?' (closed question) may be followed up with 'How can I help you today?' (open question).

Examples of closed and open questions are shown below.

Closed questions	Open questions
<ul style="list-style-type: none"> Is Tuesday suitable? Would you prefer morning or evening? Would you prefer to pay by cash or card? Shall I email that to you? Have you visited our website? 	<ul style="list-style-type: none"> What time suits you best? Why does that particular model interest you? What sort of travelling will you be doing? What leads you to that conclusion? How else can I help you today?

Once you have asked questions and think you have an understanding of what the customer is looking for, there are a number of techniques you can use to ensure you have understood correctly and reassure your customer that you have been listening to what they are saying. These tools are also valuable when you have provided information to your customer and are checking to make sure they have understood and/or have all the information they need.

Summarise	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.
Rephrase	Rephrasing is another way of making sure you understand what your customer is asking, and 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 saying what they want to say. People can get very annoyed if they are interrupted.
Ask follow-up questions	Follow-up questions can help clarify the exact needs of the customer. For example, if a customer is looking to purchase a new refrigerator and they have told you the features they are looking for and the size, you may want to ask them about their budget or the colour they prefer.

If the customer has contacted your organisation online, you may need to telephone them to clarify exactly what they want.

Example

Telephone inquiry and response

- Conor:** Hi, Simm Skin Care, this is Conor speaking.
- Customer:** Could you please send me any information you have about skin care for sensitive skin?
- Conor:** Certainly. We've got a general brochure about our sensitive skin care range or you may wish to visit our website.
- Customer:** Can you email a copy to me?
- Conor:** I certainly can. Are you interested in treating a particular condition?
- Customer:** Yes, my daughter has sensitive skin and an acne condition.
- Conor:** Our skin care range is extensively tested and has been shown to be effective in treating acne on sensitive skin. Some products are actually on special at the moment.
- Customer:** When does the special finish?
- Conor:** It finishes tomorrow. so you might want to come in or place an order through our website tonight.
- Customer:** At what time do you close?
- Conor:** We're open until 5.30.
- Customer:** All right. That sounds great. I'll try to come this afternoon.

Practice Task 5

Question 1

Which of the following are examples of questioning techniques that help identify customer needs? Tick all that apply.

- Asking a variety of questions to find out the customer's situation
- Recommending a particular product
- Paraphrasing what the customer has said
- Asking follow-up or clarifying questions
- Telling a customer what they need

2B Identify urgency and service priorities

It should always be your aim to respond to a customer's enquiry as quickly and thoroughly as possible. Identifying the urgency of competing tasks and priorities is an important skill.

The urgency and sensitivity of a customer request will vary. For example, the need for a product repair can range from extremely urgent, where there is a threat to someone's health and safety or the loss of production or revenue, through to non-critical cases where there is no real need for urgency and it is more a matter of inconvenience.

You should always attempt to address a customer's needs as quickly as possible. Leaving it too long to respond can have a number of effects, including the customer deciding to take their business elsewhere, the customer's need no longer existing or leaving a poor perception of your own service and that of your organisation in the mind of the customer. Poor perception can be very damaging to businesses in today's world given how much people post of their experiences on social media and their willingness to leave reviews on Google and other platforms.

Assess the urgency of a request

Understanding the urgency of a request and assessing its priority against other requests is an important skill in customer service. Your organisation may have tools that help you assess urgency or, if you are unsure, the advice of a more experienced colleague can be valuable.

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 send it to them as soon as you can.

When assessing the urgency of a request, consider the following questions:

Identifying the urgency of a request

- When is a response or solution needed by?
- What are the implications of not meeting the deadline?

Seek advice

If you are at all unsure as to how urgent a request is, seek the advice of your supervisor. Sometimes a request may seem minor or insignificant, but it can actually be quite urgent. Your organisation may have policies and procedures that determine how responses are to be prioritised or managed. If you are unsure, seek the advice of your supervisor.

Below are some ways to prioritise requests.

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 1–4, with 1 being the most urgent need
- use an urgency–importance matrix.

Prioritising service requests

Your organisation may have specific methods or tools that allow you to assign priority to service requests.

The urgency versus importance matrix (see below) is a useful tool for prioritising service requests. Once the deadlines and implications of not meeting deadlines have been established, the matrix can be used to determine priorities, rated from 1 to 4, where 1 is the most urgent.

	Urgent	Not urgent
Important	<p>1</p> <ul style="list-style-type: none"> ▪ Requests with tight deadline ▪ Requests with severe implications if not met <p>Examples include:</p> <ul style="list-style-type: none"> ▪ A complaint that has escalated ▪ A large order that has missed a deadline ▪ A product return that is causing a safety issue 	<p>2</p> <ul style="list-style-type: none"> ▪ Requests or enquiries from new or major customers ▪ Bigger requests with longer deadlines <p>Examples include:</p> <ul style="list-style-type: none"> ▪ A tender response with a specific deadline ▪ An important order from a new customer with a long lead time

	Urgent	Not urgent
Not important	<p>3</p> <ul style="list-style-type: none"> Minor or routine enquiries that can be dealt with quickly <p>Examples include:</p> <ul style="list-style-type: none"> Routine enquiries received via social media A question regarding opening hours A query as to whether a low-cost product is in stock 	<p>4</p> <ul style="list-style-type: none"> Other tasks not directly related to customer service <p>Examples include:</p> <ul style="list-style-type: none"> Tidying the office Filing Ordering office supplies Excessive socialising with customers and colleagues

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 help assess the urgency of customer and internal requests. This form uses a rating of 1–4, with 1 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 6 May.	2	2 May	5 May
Sue Shaw	PA system not working	1	2 May	3 May
Harry Figg	Television requires a new part. Has a second television at home.	3	3 May	10 May
Request from office manager	Sort out marketing materials by date	4	4 May	TBC

Practice Task 6

Question 1

Number each quadrant of the urgency–importance matrix according to its definition.

- Other tasks not directly related to customer service
- Short deadline, serious implications if not met
- Major requests with longer deadlines
- Minor or routine enquiries

Question 2

Which of the following statements are correct? Tick all that apply.

- If you are not sure how urgent a task is, use your best judgement.
- A daily task list can help you ensure tasks are addressed according to their urgency.
- You should always seek to respond to requests as quickly as possible.
- Waiting too long to respond to a request does not affect a customer's perception of the organisation.

2C Provide customers with information and options

When providing information to customers it is important you do so in a manner that is clear, tailored to the customer's needs and is in line with your organisation's policies and procedures.

Your communication skills are very important when providing information about options to customers, particularly if the customer is 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.

Organisations have different methods and procedures for providing the 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; or certain inquiries may only be handled by a particular department.

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.

Provide information to customers

The information you provide to customers may include company or product information and be in hard copy or electronic form. Your role as a customer service representative is to ensure you are familiar with the location and contents of such 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.

Product and service materials include:

- product brochures and catalogues
- order forms
- policy documents, such as warranties, returns, service
- price lists
- leaflets and brochures detailing company services
- website links.

Provide options to customers

When providing options to customers, you should ensure that the information you provide, and your communication style, meets their specific needs.

Sometimes a customer requires a range of options or suggestions. Use your knowledge of your organisation's products and services to help the customer 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, more-expensive product, ask the customer whether cost is an issue. Asking further questions helps identify the products and services that match the customer's needs.

Below are some tips for providing information and options to your customers.

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 the customer ask questions and tell you what they want.
Use your judgement	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 policies and procedures	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.

Example

Provide options to customers

- Customer:** Hello, I'd like to speak with Conor please. We spoke on the phone earlier.
- Conor:** Hello, yes, I remember talking with you about your daughter's sensitive skin, right?
- Customer:** Yes, that's right. She's 14 and finds her inflamed skin very trying.
- Conor:** Okay, has she tried other products?
- Customer:** Yes, she's tried XA brand and although it did help, I didn't think it was worth the money. She's tried a few others but they didn't really help.
- Conor:** As I mentioned on the phone, our skin care range is extensively tested and has been shown to be effective in treating sensitive skin. Would your daughter prefer a cream or a soap-based wash?
- Customer:** I think she'd prefer a soap.
- Conor:** We have these two soap-based options, both of which are on special. I recommend the tea tree-based one as it smells very fresh and the tea tree is quite soothing.

Practice Task 7

Question 1

Which of the following are examples of points to be considered when providing information about options to customers? Tick all that apply.

- How to best tailor communications to meet a customer's service needs
- Your organisation's policies and procedures
- Which item offers the highest profit to the organisation
- How to pressure the customer into acting quickly
- Options and solutions that best suit a customer's needs

Question 2

Which of the following statements are correct? Tick all that apply.

- There's no such thing as providing a customer with too much information.
- Some organisations have policies about how to and who can provide options and information to customers.
- Product information may include warranties and service details.
- You should tailor the delivery of information and options to meet the needs of your customer.

2D Assess limitations in addressing needs

In order to provide efficient service to your customers, you should be aware of the limitations to your authority and product knowledge, and know the processes to follow when encountering such limitations.

There may be times when you cannot meet the needs of a customer immediately and need to seek assistance from others in your organisation. There are any number of reasons why you may not be able to address the needs of the customer. Limitations may be imposed by the policies and procedures of your organisation, language difficulties or a lack of product knowledge. Examples of such limitations are outlined below.

Limitations to addressing customer needs

- The customer may want to place a special order or obtain a discount that requires approval from management.
- The customer may want to escalate a customer service complaint.
- The customer may want to return a product outside of your organisation's policies.
- You may not have the specific product knowledge.
- You are unsure what information to provide or how you can help the customer.
- You may experience communication difficulties due to language or diversity factors.

Seek assistance from designated people

There will be instances where you are unable to provide an immediate response to your customer. Knowing who to turn to for specific advice or authority helps ensure a smooth customer service process.

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.

To deal with customer requests promptly, identify the designated people within the organisation who are able to address the specific issue, whether it be product or procedure related or related to other factors. Knowing in advance who has specific product knowledge, who is available to approve discounts or returns and who is able to speak in different languages will make dealing with such limitations a smoother process when they occur. Usually this person will be your direct supervisor; however, if you are unsure, you may need to ask your supervisor, 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.

Redirecting an enquiry

- 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.

Example

Seek advice from colleagues

Conor from Simms Skin Care has been assisting a customer with skin care products for her daughter. Conor has recommended a tea tree-based soap to the customer. The customer, Paulina, has asked Conor about the soap company's animal testing philosophies and regimes.

Conor does not know himself and cannot find any details about animal testing, or the absence of animal testing, on the product labelling or company brochures.

Conor asks Pauline if she would like to leave her telephone number and he will speak with the store owner, Mr Simms, tomorrow and let Pauline know what he finds out.

Practice Task 8

Question 1

List three examples of limitations to addressing customer needs.

Question 2

Which of the following statements are correct? Tick all that apply.

- If you are unsure how to answer a customer, you should make an educated guess.
- If the person you need to consult is not available, tell the customer to come back another time.
- If you have having communication difficulties, seek assistance from a colleague.
- If a customer wants to return a product that does not meet your policies, you should seek advice from your supervisor.

Summary

- Using effective questioning techniques can help you quickly establish a customer's needs. Using techniques such as summarising what has been said, rephrasing and asking follow-up questions can be helpful.
- Interpersonal skills are an important tool in this process because they allow you to build rapport and establish how you can help the customer. Listening patiently, using friendly body language and modifying your approach to meet the customer's needs are all relevant points.
- Learning how to assess the urgency of a request is an important skill. If you are unsure as to the priority to be given to a request, you can use prioritising tools, such as an urgency–importance matrix or ranking process.
- If you are unsure how important a task is, you should seek advice from a colleague or supervisor.
- Part of the customer service process is to provide information and options to your customers. Communication skills are very important in this regard, as is the ability to determine what information to provide.
- Your organisation may have policies and procedures that detail the manner in which information is to be provided.
- When providing information and options, it is important that customers be informed, but not pressured. You should use your judgement to determine how much to say or what information to provide. Information should always be relevant, useful and tailored to meet the needs of your customer.
- There will be times when you cannot provide a response to your customers. You should be aware of the limitations within your role and learn how to address such limitations by seeking additional information or referring to a colleague.

Learning Checkpoint 2

Identify customer needs

Part A

1. What questioning and communication techniques can you use to identify a customer's needs?

2. List the two points that determine the urgency of a request

3. Which of the following are ways in which requests for service can be prioritised? Tick all that apply.

- Keep a daily work plan of priorities
- Use an urgency–importance matrix
- Keep a running list in your head
- Use a form or spreadsheet that tracks needs and requests
- Always process tasks in the order they are received

4. Identify each of the following question types. Select Open or Closed for each one.

- | | | |
|--|--------|----------|
| a) How may I help you? | » Open | » Closed |
| b) What colour do you prefer, blue or red? | » Open | » Closed |
| c) Is \$150 within your budget? | » Open | » Closed |
| d) Would you prefer a Wednesday or Thursday appointment? | » Open | » Closed |
| e) What tasks will you use the computer for? | » Open | » Closed |

Part B

Read the case study below and then answer the questions that follow.

Case study

Angela works in office administration for Thornell Organic Food Stores, a medium-sized retailer of organic fruit, vegetable and deli products. Part of Angela's role is to cover the customer service team during their lunch break.

A customer has come into the store asking about Thornell's range of organic yoghurts, cream and milk products. The customer is particularly interested in finding out about where the products are produced and the ethical treatment of cows and calves before she makes a purchase.

Angela knows her store only deals with suppliers who follow organic and ethical principles, but is not sure how to communicate this to the customer.

1. List three ways Angela could provide the customer with information about the ethical principles of Thornell's suppliers.

2. The customer has asked about the breed of cows used by each supplier, a question Angela is unable to answer. Which of the following methods should Angela use to find out the answer? Tick all that apply.
- Try to identify the breed from the pictures on the labelling
 - Ask a colleague or the store manager if they know
 - Contact the supplier
 - Examine the company brochures or website to see whether the breed is detailed there
 - Tell the customer it does not really matter what breed they are
3. Angela now has located the information the customer is seeking. How should Angela provide the information to the customer? Tick all that apply.
- Telephone the customer with the information
 - Send the customer an email
 - Make a mental note to tell the customer next time she is in the store
 - Only mention it if the customer asks about it again



Topic 3 | Provide service to customers

- 3A Confirm details of service and delivery
- 3B Address problems and delays
- 3C Improve service and products

3A Confirm details of service and delivery

To provide good service, you need to have a thorough knowledge of your organisation's products, services and procedures relating to service and delivery.

The quality of the help and service you provide to customers is vital. It is essential that you confirm all details of the service or product to be provided to a customer and record the information accurately using the correct process.

When confirming details of the service your organisation is to provide, you should, either verbally or in writing, provide a summary of the service agreed and ask that your customer confirm this. This ensures that both the organisation and the customer are clear as to details such as price, extent of the product or service, delivery details, the date on which the service is to be provided, etc.

Recording customer and service details

Most customer-facing roles require that you record customer details from time to time. It is essential that you be able to record complete, accurate details in line with the need of your organisation and the nature of the customer's enquiry.

When recording customer details and details of the service your organisation is providing, you should ensure that the information you collect is accurate, complete and fit for the purpose it is intended. Tips for collecting customer information are outlined below.

Information is complete	<ul style="list-style-type: none"> ▪ Check that you have collected all the information you need to complete the transaction. This may include contact number, delivery address, email address, product options, size or colour, etc. ▪ Ensure that addresses are completed fully, including unit number, postcode or specific delivery details (e.g. leave at the front door).
Information is accurate	<ul style="list-style-type: none"> ▪ Double-check the spelling of all names, including customer name, street and suburb names. ▪ Check that email addresses and telephone numbers have been taken down accurately. ▪ Repeat all details of the order back to the customer or send them a draft via email to ensure all details are accurate.

Service and delivery details are accurate	<ul style="list-style-type: none"> ▪ Confirm the details of delivery or service date. ▪ Advise the customer of follow-up actions in the event of a delay. ▪ Check special requirements regarding delivery (e.g. access to the delivery location) or other special requirements (e.g. dietary requirements on flight bookings).
Follow-up contact	<ul style="list-style-type: none"> ▪ Make sure the customer is clear on follow-up contact points (e.g. if they need to change the delivery date).

Organisational and legislative requirements

Most organisations have procedures that detail how the delivery of service or a product is to be managed. Legislative requirements also apply, such as privacy requirements relating to the collection and storage of personal information.

To assist their employees, most organisations have developed policies and procedures to guide service delivery.

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 (e.g. 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.

Organisational requirements relating to service and delivery may include:

- when payment is due (e.g. at the time of order, after service, after delivery)
- how the order is to be processed (e.g. completion of an order form, use of an online system)
- whether a deposit is required and, if so, how much
- what form of payment is acceptable (e.g. cheque, credit card, cash)
- lead times on orders
- delivery windows (e.g. whether a delivery time is specified or a window (morning or afternoon) is provided)
- what details are to be collected from customers
- clear completion of forms and documentation so that all staff members understand the information.

Maintain privacy of customer information

Personal is any information that may reveal the true identity of a customer – under the national privacy laws, this type of information must be secured and protected from misuse, loss or theft.

It should be remembered that the collection and storage of a customer's personal data is subject to the provisions of the *Privacy Act 1988*, key details of which are outlined below.

Key provision of the *Privacy Act 1988*

- Only collect information that is necessary to serve your customers (e.g. name and delivery address).
- Do not disclose personal details without approval from the customer.
- Use the information only for the purpose it was provided for.
- Protect the information collected.
- Sensitive information (e.g. information about religious or cultural affiliations) is subject to additional requirements.

Example

Policies and procedures at a retailer

Wilson Electrical Retailers sells a wide range of household appliances. The company has a documented procedure that the sales team is to follow each time a customer places an order to be delivered to their home.

When a customer places an order in the store, the team member is to enter the customer's delivery details at the point of sale directly into store's computer system. Before asking for the customer's address details, the sales person is to advise the customer that their details are being collected for delivery purposes only and will not be used for marketing. The sales person then ask the customer whether they would like to receive promotional materials; if the customer answers in the affirmative, a box is then ticked within the customer's online profile to indicate that they are happy to receive promotional emails.

The sales team member checks all details with the customer, including the spelling of their surname, street and suburb. The sales team member also repeats email addresses and telephone numbers back to the customer to ensure they have been recorded correctly.

Practice Task 9

Question 1

List three organisational requirements that may apply to confirming service and delivery details with a customer.

Question 2

Which of the following are key provisions of the *Privacy Act 1988*? Tick all that apply.

- Organisations should only collect information that is necessary.
- Organisations do not need approval to disclose personal details to other companies.
- Organisations must use information only for the purpose it was provided for.
- Organisations must take steps to protect the information collected.
- Organisations can collect religious affiliation information so appropriate season's greetings can be sent.

3B Address 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 person responding to the customer.

Problems and delays can occur when fulfilling all sorts of customer needs. Problems could be anything from a product not being available, to parts not in stock or a wait time 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 needs immediately, listen to what they have to say and avoid becoming defensive or putting the blame on someone else. Demonstrating empathy and understanding for their frustration will often help diffuse the situation.

Identifying potential issues

A key step in addressing problems and delays is to recognise common situations that may lead to problems and to take steps to avoid them in advance.

Recognising in advance when a problem or delay may occur can help limit potential negativity in the mind of the customer and shorten the time taken to reach a resolution. Be wary of leaving a time gap or saying you will get back to someone in 10 minutes with the information they require, then finding you cannot get the information you need in that time and follow-up a couple of hours later. In this situation, the customer would have the right to feel let down because you have not delivered on a promise.

By understanding common pitfalls and problems in the customer service process you can recognise when situations are likely to cause problems. For example, when working in a hair salon you may recognise that certain times of the year are very busy. That knowledge will allow you to warn customers that they may not be able to make an appointment at short notice.

Tips for overcoming problems and delays

Taking steps to overcome problems and delays and maintaining a positive customer impression are important parts of the customer service process.

It is only natural that customers will feel disappointed or even let down when a problem or delay occurs with their service. It is your role to minimise this disappointment and work to ensure your customers remain satisfied with your organisation's service.

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. 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 problems and delays

- Treat customers with genuine empathy, courtesy, patience, honesty and fairness.
- Inform the customer of a problem or delay as soon as it is identified.
- Inform the customer in person and do not leave a message or rely on email.
- Before you speak to the customer, and keeping in mind the effect the problem or delay will have on them, gather all the appropriate information.
- Tell the customer how the problem or delay will be handled and advise them of when to expect a resolution.
- Advise the customer you are taking full responsibility for dealing with the problem or delay.
- Keep the customer informed of progress.
- Always work within relevant government regulations and ensure customers' rights are protected as per your organisation's customer service policies and procedures.
- Follow up with customers after delivery to ensure they are satisfied.

Example

Joan's delayed response from a gymnasium

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 10 days. The information was not at reception two weeks later and Joan was told to ask again in a week – but the information was not available then either.

Eileen has recently commenced as a shift receptionist at the gymnasium and was on duty when Joan again came in last week. Joan was very frustrated that the information she had asked for on numerous occasions had not been provided.

Eileen apologised for the delay and made a commitment to Joan to email the information to her by the end of the week. She took down Joan's email address and telephone number and double-checked the details with her.

Eileen prepared the information and emailed it to Joan on Friday morning. She then telephoned Joan that same day to confirm the information had been received, to again apologise for the delay and to ask whether Joan had any follow-up queries.

Practice Task 10

Question 1

Number each step from 1 to 5 in the order you would follow when advising a customer of a delay in delivery of a product.

- Follow up after delivery to ensure the customer is satisfied
- Keep the customer informed of progress within agreed time frames
- Identify the delay and gather all relevant information
- Apologise and take responsibility for the delay
- Notify the customer of the delay and when a resolution is expected

3C Improve service 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. Continual improvement leads to more satisfied customers.

Employees who deal with internal and external customers on a day-to-day basis are often the best people to identify opportunities to improve products and services. Better products and services lead to customer loyalty and an increased number of customers.

Identify opportunities to improve service and products

Your experience in dealing with customers will often provide opportunities to identify areas for improvement. These may include procedural changes, adjustments to the ways products are displayed or improvements to service and warranties.

When working in customer-facing roles, you will be able to identify and act on 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 alternative service options provided by your company in more detail. 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. Other methods to identify opportunities for improvement include evaluating commonly occurring customer queries or complaints and recognising common purchase patterns or procedural aspects, such as ordering and delivery processes.

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

Warranties, guarantees and support	Providing additional guarantee or warranty periods, or tailoring the support services to meet the exact requirements of the customer
Packaging options	Providing alternative packaging or an option to deliver the product unwrapped if that is the customer's preference
Pricing options	Providing pricing options to increase flexibility and meet customers' budget constraints (e.g. shops selling electronic equipment may provide a reduced price for customers purchasing both a television and a DVD player or a discount may be given to long-term customers)

Delivery procedures	Tailoring delivery procedures for the goods and services to meet customer needs; 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 may 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	Reading customer feedback and complaints to identify opportunities; something you read may spark an idea as to how you can improve a service or product for a customer

Take action to improve service

Once you have identified areas in which customer service can be improved, you should consider how you can act to implement these improvements.

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

When you have an idea that may 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.

Ways in which improvements to service can be implemented are outlined below.

Options for implementing service improvements:

- discussion in team meetings
- formal presentation of ideas and benefits to management
- staff mentoring, where the staff member with the idea supports other staff to implement the improvement
- formal staff training sessions
- modifying procedure documents.

Example

Present ideas in a written proposal

Suggestion to reassess the layout of the shop floor for the Fabulous Frock Shop

Reasons for suggestion

- In the past 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 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:

- reassess 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 the number of articles available for sale, lay-by and the return policy on sale items, as well as any other information related to catalogue items.

Benefits for the customer

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

Benefits for the organisation

- increased sales and profits
- increase in return customers
- benefit gained from catalogue.

Practice Task 11

Question 1

Describe two ways opportunities for product or service quality improvements may be identified.

Question 2

Which of the following are options for actioning service improvements? Tick all that apply.

- Mentoring staff members
- Threatening to issue warnings to staff who do not adopt new practices or procedures
- Writing a submission to management that details suggested improvements and benefits
- Making changes yourself and leaving others to make their own changes
- Discussing in team meetings
- Team training sessions

Summary

- When recording customer service details it is essential that you record all the details required and check that the information you have collected is accurate.
- Most organisations have procedures relating to how and what information is to be collected. This may include filling out specific forms, collecting information in a certain format and adhering to all relevant provisions of the *Privacy Act 1988*.
- Problems and delays are often unavoidable, and you should ensure you take steps to make such occurrences as stress free as possible for your customer.
- Proactive collection of all details relating to the delay and early notification of the issue and the proposed response will help make delays more palatable to your customers.
- You should remember that delays and problems are likely to be very frustrating to your customer. Techniques such as taking responsibility, demonstrating empathy and committing to keep the customer updated as to order progress can help diffuse their anger.
- When working on the frontline with customers, you are often well positioned to recognise areas where service and products can be improved or enhanced. Commonly occurring customer questions and complaints often provide opportunities for improvement.
- Once you have identified ways in which a service can be improved, you should discuss these with your supervisor or manager. Additional actions can include making a written submission to management, discussing ideas in a team meeting or modifying procedural documents.

Learning Checkpoint 3

Provide service to customers

Part A

1. List two provisions of the *Privacy Act 1988* that relate to collecting and recording customer information.

2. Which of the following are examples of organisational requirements that may apply to confirming the delivery of a refrigerator? Tick all that apply.

- Collecting all details using relevant forms and processes
- Double-checking spelling and telephone numbers
- Advising the customer of the delivery date and time window
- Asking the customer whether there are stairs at their house
- Asking the customer for their social media profile
- Asking the customer for their date of birth

Part B

Read the case study below and answer the questions that follow.

Case study

Kevin works for a company that designs and fits out office interiors. He has been meeting with a new customer, Valerie, about the office furniture and partitions for her company's new corporate headquarters. Valerie has selected all the required items and is finalising her order with Kevin. Kevin has advised that the items will arrive in approximately 4 weeks, after which time Kevin will arrange installation.

1. List three pieces of information Kevin should record in order to efficiently follow up with Valerie about her order.

2. After Valerie leaves, Kevin places the order and is advised that the chairs Valerie has chosen will not be available for three months. Which of the following options are appropriate steps for Kevin to take? Tick all that apply.

- Research suitable alternatives
- Try to find the chairs at another wholesaler
- Offer a refund without first offering a substitution
- Wait a few weeks and see what happens
- Contact Valerie promptly and discuss options with her

3. Describe how Kevin can follow up with Valerie to ensure she receives all her items and is happy with the service.

4. Which of the following represent opportunities arising from this situation that may improve the quality of service provided by Kevin's employer? Tick all that apply.

- Modify the order process to ensure stock availability is checked before an order is placed by a customer.
- Investigate alternative wholesale suppliers of popular products.
- Tell customers what products they should order.
- Cancel orders when products are not immediately available.
- Monitor enquiries for a particular product and consider holding stock if customers ask for it regularly.
- Educate team members as to typical product ordering lead times.

5. List two actions Kevin could take to implement the improvements identified in Question 4.



Topic 4 | Process customer feedback

- 4A Seek and respond to customer feedback
- 4B Record feedback and communications with customers
- 4C Identify and address unmet customer needs
- 4D Encourage customers to maintain contact with the organisation

4A Seek and respond to customer feedback

Feedback from customers may be received in a variety of forms and can be either positive or negative. Regardless of the nature of feedback, it is important that you respond to and action the feedback in line with your organisation's policies, procedures and legal responsibilities.

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. Feedback, either positive or negative (a complaint), may relate to the sale of goods, delivery requirements, the provision of a service, invoicing and pricing or the quality of customer service or service provision.

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.

Why is feedback important to an organisation?

Feedback from customers shows an organisation how they are performing and offers an opportunity to improve products, services and processes.

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 an 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 may use the comments in promotional campaigns or when they are speaking with other customers.

Conversely, 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 the organisation do to get the customer back?

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.

Seeking and receiving feedback

Feedback can take many forms and can either come from internal customers (your colleagues) or your external customers.

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.

Successful organisations take a proactive approach to feedback. Rather than waiting for customers to offer their opinion, they actively ask customers to provide them with feedback. This allows organisations to quickly identify where they are performing well and areas in which they need to improve. Examples of methods by which feedback can be sought are outlined below.

Methods of seeking feedback from customers

- Surveying clients to ask about the organisation's performance, products or service
- Asking a customer to leave a review following a purchase
- Asking a customer to complete feedback cards in restaurants or accommodation venues
- Asking a customer how they feel about the product or service (e.g. a waiter in a restaurant)
- Providing opportunities for automated feedback responses at the end of a telephone call or online interaction
- Responding to customers' comments on your organisation's social media page

Types of feedback

Feedback comes in a variety of forms and may be positive or negative. You and your organisation may receive external feedback from your customers or clients, as well as internal feedback from others within your organisation.

The types of feedback your organisation receives will vary according to the nature of the organisation and the products or services it offers.

It is easy to think of all feedback as being negative, but sometimes customers will offer positive feedback for a job well done. Feedback may come from those outside your organisation or your internal customers (i.e. those you work with).

The following table describes some of the feedback an organisation may 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.'

Respond to customer feedback

It is essential that all feedback is addressed promptly and thoroughly. It may be possible to respond to and address some feedback immediately, whereas other types of feedback may require referral or investigation prior to a response.

An organisation's image and its relationship with its customers can be affected 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. This is particularly relevant where feedback includes serious concerns, such as a product or service being harmful or causing damage.

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 the feedback 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 the email 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. There may be guidelines as to how quickly you are required to respond to customer feedback.

Follow organisational and legal procedures

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 your customers.

Dealing with feedback promptly and courteously is crucial to an organisation's success. Policies and procedures help 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. This will encourage the customer 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, whereas 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.

Typical points addressed in organisational policies and procedures may include the following:

Your responsibilities	Should you deal with the feedback yourself? Find out what type of feedback you have responsibility for. This 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 may 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 may 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 timelines	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 the communication techniques to use. These may be contained within a customer service charter.

Legislative requirements applying to feedback

Serious feedback from customers may have legal ramifications or require a response in line with legislated requirements.

Some types of feedback require that the organisation respond in a specific manner as defined by legislation. An example of this is honouring warranties associated with products or recalling products that are found to have a potentially dangerous flaw or fault.

Organisational policies should address legal commitments in the event of a serious complaint, such as one that has legal or ethical ramifications. 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.

Example

The customer service charter

Many organisations have a customer service charter. This document outlines how the organisation will communicate and work with its customers. It details the services that the organisation will provide to its customers, how that service will be delivered and what outcomes customers can expect to receive.

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

Practice Task 12

Question 1

Which of the following statements are correct? Tick all that apply.

- Seeking feedback is a proactive approach to understanding how an organisation can improve its products and services.
- Serious complaints, such as a product that has caused harm or damage, may have legal ramifications.
- Asking a customer to complete a survey is one way in which feedback can be sought.
- Only negative feedback needs a response.

Question 2

List three ways in which customer feedback may be sought.

4B Record feedback and communication with customers

In order to respond to and address feedback it is important to accurately and thoroughly record all details required to address the feedback received.

When recording customer feedback, it is important to capture all the details of the feedback offered. Accurately recording details shows your customer that you are serious about their feedback and allows you to follow your organisation's procedures for responding to that feedback. Your organisation's procedures may detail how feedback and communication with customers is to be recorded (e.g. completing a feedback or customer contact form).

Details to be recorded will vary according to the nature of the organisation and the method by which feedback or communication is to be recorded. 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.

Recording customer feedback accurately and completely

It is essential that all customer details, communication and feedback be recorded completely and accurately so that further action can be taken.

As we saw in Topic 3A, accurate and complete recording of relevant details, such as name and contact details, plus a complete record of communication and feedback, is essential. 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. In such instances, 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.

Common methods for recording feedback and communication are outlined below.

Common methods for recording customer communication and feedback

- Using a customer relationship management (CRM) system that holds a customer's details, records of transactions and communications
- Using a feedback or complaints register
- Using your organisation's feedback form
- Storing written records in customer files

Guidelines for recording customer information

Any information recorded about a customer must be clear, accurate and factual.

Any information that you record about a customer will form an official record of evidence for the organisation that you work for. It is therefore important that you check and correct any information to ensure it is clear, accurate and factual.

Under the *Privacy Act 1988*, organisations are legally required to supply customers with information about their personal account upon any reasonable request. As stated in Australian Privacy Principle (APP) 12, consumers have a general right of access to their own personal information; in addition, consumers have the right to have that information corrected if it is inaccurate, incomplete or out of date (APP13).

Breaches of the *Privacy Act 1988* can lead to large fines for you and your business; therefore, it is important to follow your organisation's guidelines and be careful with details when leaving notes on an account or recording customer feedback.

When writing notes and entering customer feedback, it is important to:

- check your work for accuracy and ensure that names, dates, reference numbers and other information are recorded correctly
- ensure you complete all fields on the organisational form
- avoid bias and unprofessional language
- consider who is going to read your record and make sure it is professional and appropriate
- try to record the feedback straight away; that way, the information will be fresh in your mind and you will be able to record it more accurately.

Example

Using a customer complaints form

A customer complaints form may look like the following example.

Customer complaints form					
Date: 3/10/16		Received by: (Officer's name) Josh Leyton			
How received:	<input type="checkbox"/> Visit	<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Telephone	<input type="checkbox"/> Fax	<input type="checkbox"/> Letter
Customer name: Mrs Evelyn Guthridge					
Organisation: -					
Organisation/home address: 25 Bedford Parade Bardon QLD 4065		Contact details: Phone: 07 1111 0000 Fax: - Email: -			
Invoice number: 32100		Order date: 28/9			
Product/service: 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			
Additional information: Customer said an agreement was made to receive a 15 per cent discount.					
Immediate action: Told customer we will investigate. Thanks for calling. Will get back as soon as possible. Read file for record of transaction.					
Further action required: Contact customer with result.					
Customer service officer: J Leyton					

Practice Task 13

Question 1

Which of the following are appropriate methods of recording customer feedback and communication? Tick all that apply.

- Writing details on a sticky note
- Making a mental note of the details
- Recording details in a customer feedback register
- Using a customer relationship management system
- Checking all information to ensure it is accurate, clear and based on the facts

Question 2

A customer has telephoned your office to make a complaint about a staff member. List at least three details you should record for follow up.

4C Identify and address unmet customer needs

An important part of customer service is being able to identify and address a customer's unmet needs. This includes effectively communicating the limitations of the service or products you offer and exploring alternative services and products.

After you have recorded your communication with or feedback from a customer, you should seek to identify whether the 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 to ask the customer appropriate questions. Determine exactly what the customer is asking for and clearly explain what you can offer. In this way you will be able to identify precisely what the customer wants.

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

Identify unmet needs

You need to explore a customer's needs and look for alternative ways of helping them that is in line with your organisation's policy.

By examining and reflecting on feedback received from a customer you may identify an opportunity to satisfy some unmet needs. By identifying these unmet needs, you give your organisation a chance to increase their business by building a loyal, ongoing customer relationship.

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

Type of need	Example
An organisation may not be able to meet a customer's specific request	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Barney's Financial Services tells the customer that it does not provide in-home consultations Ace Printing Services explains that it does not offer online print setting

Type of need	Example
An organisation may not be able to supply the product the customer has asked for	<ul style="list-style-type: none"> Blakes Management Training does not offer a course in financial management at diploma level SLM Social Media does not work with interstate clients
An organisation may not be able to supply the product the customer needs at the time they require it	<ul style="list-style-type: none"> Fareena's Interior Decorating cannot deliver a proposal within a week 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 a customer requires	<ul style="list-style-type: none"> Erikson Medical Wholesalers cannot supply a large bulk order of disposable gloves at short notice
An organisation may not be able to offer a refund	<ul style="list-style-type: none"> John's Physiotherapy does not offer a money back guarantee on physiotherapy treatment
An organisation may not accept returns	<ul style="list-style-type: none"> The notices displayed prominently in Jewels Boutique say 'Select with care. No returns accepted.'

Provide options to meet unmet needs

Once it has been determined that your customer's needs have not been met, you should explore options to satisfy those needs. Key to doing this effectively is to have a solid understanding of your organisation and its products, services and policies.

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 prevent a loss in 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 may suggest they purchase the basic model that is cheaper, but is good value for money and meets their needs.

Always consider other ways of dealing with unmet needs, such as other arrangements that you can offer that are in line with your organisational policies and procedures. 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.

Example

BizOps customer service procedure

The following procedure is taken from the BizOps customer service policy, explaining how staff should respond to customers by offering alternative solutions based on a range of situations.

You cannot 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.'

You cannot arrange a meeting with the person the customer 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.'

You cannot 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.'

You cannot 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.'

Suggest other options

Often a customer may not be aware of alternative products or service that will meet their needs. Effective customer service involves being able to explore and identify alternative offerings to satisfy your customers' needs.

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 the customer's objection was. For example, if they have said that the product is too expensive, do not 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 do not want to push the customer 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 alternative options include:

- advising the customer about cheaper products or services that meet some of their needs
- 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.

Practice Task 14

Question 1

Which of the following are ways in which you can identify a customer's unmet needs? Tick all that apply.

- Reviewing comments on your company's social media pages
- Reviewing records of customer communications
- Examining monthly sales figures
- Asking customers about their needs and preferences
- Making assumptions about customers' needs based on their appearance

Question 2

Number each step from 1 to 4 in the order you would follow to identify customer needs and propose alternative solutions

- Explain the benefits of an alternative product and how it may meet their needs
- Propose an alternative product
- Receive feedback that the customer is unhappy about the available product choices
- Discuss the customer's needs in order to understand what they want a product to do

4D Encourage customers to maintain contact with the organisation

Part of effective customer service is continuing to service your customers' needs long beyond their initial purchase or engagement with your business.

Providing quality service to customers is the most effective way to ensure they become repeat customers. Once people have experienced personalised, caring service from an organisation, it is unlikely that they will look elsewhere when next looking for a similar product or service. It is said that the cost of keeping a customer is much less than the cost of obtaining a new one, so servicing your customers long beyond their initial purchase makes good business sense.

Your existing customers can be your biggest source of new customers. By looking after and keeping in touch with your customer base, you make it easy for them to refer their friends and family to your service.

Encourage customers to keep in touch

There are many methods by which you can encourage customers to maintain contact with your organisation. The methods you choose will depend on the nature of your business and the preferences of your clients.

There are a number of ways that this process can be enhanced so that your organisation remains at the top of your customers' minds, as outlined below.

Newsletters and emails

Sending a regular newsletter or email to your customer database is an excellent way to encourage customers to keep in touch. You should ensure you have your customers' permission to email them for promotional purposes because unsolicited emails can be annoying to your customers. Your emails should offer information and value that only your subscribers receive (e.g. first notification of sales, discount codes, additional information not publicly available, etc.)

Customer-only events

VIP events, such as private sales, breakfasts or coffee mornings for customers, help reinforce to your customers that you value their business. Such events provide you the opportunity to showcase new products, services or your customers' expertise. These events also allow your customers to mingle and share their experiences of your business with each other.

Social media

Encouraging your customers to like your social media pages can form part of your sales or new customer on-boarding process. Offering valuable information exclusively through your social media channels gives your customers a reason to follow and engage with your social media accounts. You should avoid using your social media platforms purely as a promotional platform because this can be off-putting to some.

Remind your customers that they are always welcome

Offering a friendly face and reminding your customers that they are always welcome to come into your business to ask questions, browse or just say hello reminds them that they are valued – and not just for the dollar value they bring.

Be a source of valuable information

Whether it is via email, telephone or social media, be a source of valuable information for your customers. For example, if you are a real estate agent, encourage your customers to ask your advice on the property market, even if this does not mean a sale. Providing advice positions you as an expert in your field and reinforces to your customers that you are reliable, helpful and there to service their needs. This may lead to you gaining their business again in the future or referrals to their friends when they are looking to buy or sell.

Offer marketing material

Giveaways such as branded pens, sticky notes and mugs are a way for the brand to always be visible and top of mind for your customers. Ensure the products you use as giveaways fit with your brand and the needs of your customers.

Example

Encourage customers to keep in touch

Sporty Souls Physiotherapy has developed a new customer retention process that all its team members are required to follow whenever a new client engages with the business.

Part of this process is that both the attending physiotherapist and the front counter staff are to encourage new members to follow Sporty Souls on Facebook and Instagram. Physiotherapists are encouraged to mention that the business shares tips for wellbeing and exercise related to participation in sport, whereas front counter staff are to mention that Sporty Souls offers regular information evenings about the latest thinking in the management of sports injuries. All staff are also required to encourage customers to leave a review on Facebook.

Practice Task 15

Question 1

Which of the following statements are correct? Tick all that apply.

- Customers can be encouraged to follow an organisation's social media page for the latest updates.
- Email newsletters should only be sent with a customer's permission.
- Winning a new customer is always more beneficial than retaining an existing one.
- Your existing customers can be excellent advocates for your business.
- Providing valuable information after a sale is a waste because the purchase has already been made.

Summary

- Feedback from customers is an excellent source of information that can be used to improve and enhance your products, services and support to your customers. Feedback shows you how your organisation is performing and highlights areas requiring improvement.
- Successful organisations do not wait for customers to offer feedback: they proactively seek it out by asking their customers how they are performing.
- Feedback can be sought via customer engagement surveys, encouraging customers to leave a review, automated feedback prompts at the end of a telephone call or responding to comments on social media.
- It is essential that you respond to all feedback, both good and bad. An organisation's relationship with a customer can depend on how the organisation responds to feedback offered.
- If your customer has had a poor experience, but you accept responsibility and work with them to rectify the situation, you may find that the customer will be satisfied and remain loyal.
- Your organisation may have policies and procedures that detail how feedback is to be managed. Such policies may detail the extent of your scope to respond to feedback, to whom complaints are to be referred, timelines for response, etc.
- You should accurately and completely record all details of communication and feedback from customers. Accurate recording means that you are able to ensure relevant action is taken and responses are fed back to the customer.
- Evaluation of feedback received allows you to determine how your products or services are failing to meet customer needs. Reflection on feedback received may show where opportunities exist to improve products or services or customer management processes.
- Once the unmet need has been evaluated you should compile options to present to your customer to address their needs. This may include alternative products, delivery times or service options. In presenting such options you should highlight how the option presented meets the customer's needs.
- Encouraging customers to maintain contact with your organisation helps ensure that first-time customers become repeat customers. People will remember the service you offer them long after that initial purchase if you take steps to remain at the top of your customers' minds.

Learning Checkpoint 4

Process customer feedback

Part A

1. Which of the following are appropriate methods of seeking feedback from customers? Tick all that apply.
 - Sending a client at your aged care facility a message from your personal Facebook account.
 - Encouraging a customer to leave a review about your restaurant on your website.
 - Asking a customer to fill out a feedback form before you cut their hair.
 - Telephoning a customer after they have had their car serviced at your garage.
 - Asking visitors to an exhibition to complete an exit survey.

2. Which of the following statements are correct? Tick all that apply.
 - Organisational procedures may include the time frame in which feedback must be responded to.
 - You should identify your scope of responsibilities with respect to responding to feedback.
 - Serious feedback, such as that with legal ramifications (e.g. a product that has caused damage or harm), should always be referred to a senior manager.
 - A CRM system allows detailed tracking of customer details, communication and feedback.
 - Communication and feedback should only include minimal details so as to save time.

3. Draw a line to match each unmet customer need with its potential solution.

- | | |
|---|---|
| » Product is out of stock | » Offer to take their details in the event that a customer cancels |
| » Restaurant is fully booked | » Advise which staff members are available |
| » Preferred nail technician is on leave | » Offer to keep the customer informed and commit to following up daily |
| » Delivery of chair will be delayed | » Show the customer alternative products and describe how these products meet their needs |

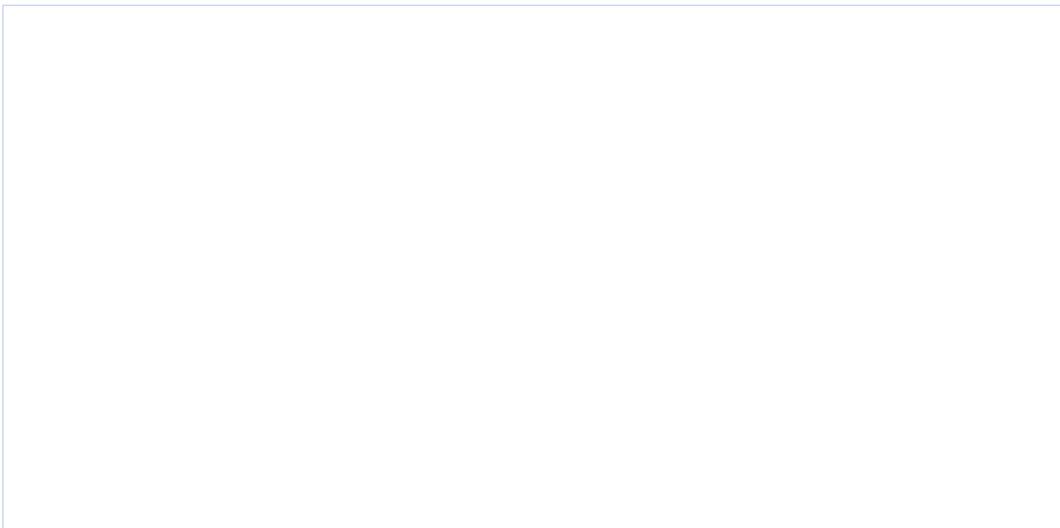
Part B

Read the case study below and answer the questions that follow.

Case study

Angela works as an administrative support officer in the corporate conference team of a large city hotel. She is aware that the conference market is very crowded with a number of hotels all competing for the same companies' business. Angela has been asked by her manager to research how the hotel is perceived by customers in the corporate conference market.

1. List three ways Angela could seek feedback from the corporate customers.



2. A customer has telephoned Angela following their stay and said that a staff member was bitten by bed bugs while staying at the hotel. Which of the following details should Angela record during her telephone conversation? Tick all that apply.

- Name of customer
- Their telephone number
- The dates they stayed at the property
- How old they are
- Their home address
- The nature of their complaint

3. The customer advises that she will be seeking legal advice if she is not happy with the response received from the hotel. Which of the following are appropriate steps for Angela to take? Tick all that apply.

- Refer the complaint to her supervisor or hotel legal team
- Apologise to the customer and seek to negotiate a mutually suitable outcome
- Ignore it; some people just like to complain
- Deny that the bites could have come from the hotel

4. Describe how Angela can encourage customers to maintain contact with the hotel for future conference needs.

5. During a team meeting, suggestions were sought for ways to encourage conference customers to stay on for a few more nights after their conference. Which of the following steps are appropriate actions for Angela to take in order to encourage customers to stay longer? Tick all that apply.
- Explain to customers that they should stay longer because it makes their stay more profitable for the hotel
 - Highlight local attractions and things people can do in the local area
 - Review feedback to see whether any negative commentary may be contributing to short stay length
 - Refuse future bookings from people who only stay one night
 - Suggest that the hotel bundle three-night stays at a discount price

