

**BSBOPS304**

**DELIVER AND  
MONITOR A  
SERVICE TO  
CUSTOMERS**

# **BSBOPS304**

## **Deliver and monitor 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 *BSBOPS304 Deliver and monitor a service for customers*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: [www.training.gov.au](http://www.training.gov.au).

### How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	<ul style="list-style-type: none"> <li>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.</li> </ul>
Examples	<ul style="list-style-type: none"> <li>These highlight key learning points and provide realistic examples of workplace situations.</li> </ul>
Practice Tasks	<ul style="list-style-type: none"> <li>Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which Practice Tasks to complete.</li> </ul>
Summaries	<ul style="list-style-type: none"> <li>Key learning points are provided at the end of each topic.</li> </ul>
Learning Checkpoints	<ul style="list-style-type: none"> <li>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.</li> </ul>

## 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
Learning	<ul style="list-style-type: none"> <li>Identifies and follows up on opportunities to improve work practices and outcomes</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>Provides information or advice using structure and language to suit the audience</li> <li>Asks questions and listens to gain information or confirm understanding</li> </ul>
Reading	<ul style="list-style-type: none"> <li>Evaluates textual information to determine customer service requirements</li> <li>Proofreads texts for clarity of meaning and accuracy of grammar and punctuation</li> </ul>
Writing	<ul style="list-style-type: none"> <li>Completes responses to customer complaints in required format</li> <li>Prepares reports using sequencing, format and words to communicate recommendations clearly and effectively</li> </ul>
Planning and organising	<ul style="list-style-type: none"> <li>Complies with organisational policies and procedures relevant to role</li> <li>Plans and implements systems to gather and organise information</li> </ul>
Problem-solving	<ul style="list-style-type: none"> <li>Uses problem solving skills to analyse and respond to customer complaints or enquiries</li> </ul>
Teamwork	<ul style="list-style-type: none"> <li>Selects and uses appropriate communication conventions to establish connections, build rapport, seek information and develop professional working relationships</li> <li>Adjusts personal communication style in response to the opinions, values and particular needs of others</li> </ul>

## What do you already know?

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

Topic	Key outcome	Rate your confidence in each section
Topic 1: Identify customer needs	1A Identify and clarify customer needs and expectations	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Determine the urgency of a request	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Match customer needs with appropriate products or services	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Seek assistance to meet customer needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Deliver customer service	2A Follow organisational and legislative requirements of customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Establish a rapport with customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Handle customer complaints	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Deliver a high-quality service to customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2E Promote products and services	<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: Evaluate customer service delivery	3A Review customer satisfaction by analysing verifiable evidence	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Seek and respond to customer feedback	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Identify opportunities to enhance the quality of customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Document recommendations for customer service improvements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3E Submit recommendations for improvements to customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



## Topic 1 | Identify customer needs

- 1A Identify and clarify customer needs and expectations
- 1B Determine the urgency of a request
- 1C Match customer needs with appropriate products or services
- 1D Seek assistance to meet customer needs

# 1A Identify and clarify customer needs and expectations

---

Understanding who your customers are and what they expect from your service or product is key to building long-term relationships.

## Identifying your customers

Customers can be defined as internal or external.

Internal customers are people you provide services for your organisation, whereas external customers purchase your organisation's products and/or services.

Customers may be from other organisations, businesses or government departments. They may be corporate clients, individual members of the public, consultants, contractors or suppliers.

Regardless of whether the person is internal or external to the organisation, it is important to recognise the key to success is how you service the customer.

## Internal customers

Every job role requires an employee to provide good customer service to their colleagues.

Some employees never deal directly with the public. Their 'customers' are fellow staff members.

For example, although most employees in commercial companies these days have basic computer skills, an administrative expert might contribute specialised work, such as dealing with spreadsheets, databases, reports or graphic design. The expert delivers a service (specialised work) to the customers (colleagues).

In a similar way, employees of every kind deliver services to 'internal' customers. Support for internal customers strongly affects the quality of the service delivered to external customers.

## Organisational plan or chart

Get to know your internal customers by understanding your organisation's plan or chart.

Gathering accurate data on internal customers is vital for the smooth running of an organisation. An organisational chart identifies the roles of different staff members, departments and branches, providing a quick guide to internal customers.

All employees depend on services provided somewhere else in the organisation in order to deliver their own services.

Become familiar with the names of staff who can supply accurate information or services, and ensure you know how to locate these people quickly. A current staff directory is generally distributed by an office manager in hard copy or placed on the organisation's intranet.

There is a direct link between internal staff satisfaction and external customer satisfaction. Any staff members who receive high-quality services in their own organisation will be more motivated to deliver high-quality services to their external clients.

## External customers

Data on external customers can build more effective customer relationships.

External customers are people indirectly connected to your organisation who purchase products, services or advice from your company.

Getting to know your customers can be a challenge, especially for organisations with thousands of clients. If the organisation is dealing with external customers, it is advantageous to establish and maintain accurate data in a client management system (CMS). Knowing specific details about your customers saves time and assists in building effective customer relationships.

A customer database may include:

- the customer's name and preferred title; for example, Ms, Mr, Dr
- contact details
- type of business
- type of product or service purchased or accessed
- payment preference and history, where applicable
- customer service record; for example, satisfaction, complaints
- whether the customer has any special arrangements; for example, discounts
- personal details, such as birthdays or special interests.

## Clarifying what customers really want

In order to meet a customer's needs, it is important to find out what they want.

Internal and external customers require different services from an organisation.

Let's explore why a customer may be motivated to contact you.

External customers may seek information relating to:	Internal customers may seek:
<ul style="list-style-type: none"> <li>▪ the organisation and what it does</li> <li>▪ office opening hours</li> <li>▪ contact details</li> <li>▪ products and/or services offered (general or specific)</li> <li>▪ prices</li> <li>▪ delivery details</li> <li>▪ payment options</li> <li>▪ obtaining a refund</li> <li>▪ returning products</li> <li>▪ making a complaint</li> <li>▪ speaking to someone responsible for a product</li> <li>▪ where they can make a complaint</li> <li>▪ arranging an appointment.</li> </ul>	<ul style="list-style-type: none"> <li>▪ information about your department or area; for example, if you work in a sales department, you may need to provide sales figures to other departments</li> <li>▪ specific information; for example, the cost of an item or safety instructions</li> <li>▪ research information; for example, details on catering firms or government policy</li> <li>▪ a report your department has prepared</li> <li>▪ information regarding a particular customer.</li> </ul>

There are two ways of finding out what customers really want: conducting market research and using effective communication skills.

## Conducting market research

Many organisations invest in market research to identify who and where their primary customers are and how they use their products.

### Use of market research

- The information gathered from market research helps businesses understand their customers and is used to guide business decisions.

### What is market research?

- Market research is an efficient way to collect information about your market, competition and environment.

### Aim of market research

- The aim of market research is to identify customer needs and to develop a database of information. The database usually includes where customers are located, their buying patterns and their preferences. A customer database enables organisations to understand who their external customers are, where they can be found, what they buy and how they buy.
- An accurate database of external customers and their profiles is required to effectively conduct market research. Some organisations have this information; others purchase databases from companies that specialise in this area.

### Occurrence of market research

- Market research is not an activity conducted only once; it is usually an ongoing study.

When an organisation is conducting market research, it should look at conducting both primary and secondary research.

## Primary research

Primary research is conducted by or on behalf of organisations themselves, targeting existing and potential customers. It collates customer expectations and experiences directly related to an organisation's products or services.

Methods used to collect original data include:

- focus groups – to identify the need to add safety features to a product, provide different colours and/or sizes, and recommend other variations
- customer surveys – to identify difficulties and offer ideas to enhance customer service
- research into the competition – for example, competitors' solutions to customer problems, use of technology and trade in niche markets
- research into product trends – for example, whether a new model is being planned or if a product is to be superseded.

## Secondary research

Secondary research is information or data that has already been gathered, and sometimes analysed, by others; it is often free or available at a minimal cost.

Secondary information can be found on the internet or in organisation newsletters, magazines and trade journals; television and radio programs; and notes from consultants or professional bodies.

Organisations that carry out and document research for the public include:

- government agencies; for example, the Australian Bureau of Statistics or Austrade
- employer bodies; for example, the Australian Chamber of Commerce and Industry or the Business Council of Australia
- specific research bodies; for example, the National Centre for Vocational Education Research or the Children's Nutrition Research Centre
- universities.

## Using effective communication skills

**Understanding your customers' needs, wants and motivations relies on effective communication skills.**

Effective communication strategies include actively listening to customers, reading and using body language, asking questions and summarising information.

### Listening effectively

Listening to a customer is probably the most important aspect of dealing with queries over the phone or face-to-face. Good listening skills can save time and help establish stronger business relationships. Unfortunately, some people are so eager to talk to a customer and supply them with information that they don't listen to the customer's request.

The impact of being listened to can have a powerful effect on customers.

### Listening carefully

- When you listen actively to customers, you:
- show that they are important and worthwhile
  - demonstrate that you are interested in who they are
  - help to reduce emotions and anger
  - assist them in developing trust and confidence in the relationship.

### Not listening carefully

If you do not listen actively to customers there is a risk that you will misunderstand what they are saying, which could result in providing the wrong information.

When people don't listen carefully, they may:

- hear only part of what the other person is saying
- hear information incorrectly
- assume they know what the other person is going to say and interrupt or complete their sentence
- forget what the other person has already said.

## How to listen

Here are some tips on how to listen effectively to customers.

<b>Take notes</b>	<ul style="list-style-type: none"> <li>• It is sometimes difficult to remember everything a customer says, especially if the conversation is long. Always record the important aspects of what is being discussed and the action that will be taken. This can be used for later reference.</li> <li>• Taking notes shows the customer that you are listening to what is being said.</li> </ul>
<b>Get rid of distractions</b>	<ul style="list-style-type: none"> <li>• Do whatever it takes to eliminate distractions when listening to others.</li> <li>• It is always hard to listen well if there are distractions such as a noisy machine or loud music.</li> </ul>
<b>Take time to listen</b>	<ul style="list-style-type: none"> <li>• Think about a time when you were trying to communicate an important message and the listener was busy. Did you feel that you were given sufficient attention?</li> <li>• Customers need assurance that they are being listened to and understood. When speaking face to face, build that assurance by nodding appropriately and telling them that you understand, if you do.</li> <li>• You can also ask the customer to repeat essential details, such as document particulars or invoice numbers. On the phone, repeating words or using phrases such as 'yes', 'uh huh', 'I agree' or 'of course' has a similar effect. These expressions are often referred to as 'verbal nods'.</li> </ul>

<b>Listen fully</b>	<ul style="list-style-type: none"> <li>• Every piece of communication gives a clue about how a person thinks and feels. A wise person will also hear what is going on. For example, if a person with a doctor's appointment has been waiting a long time, he may ask the receptionist, 'Am I ever going to see the doctor?' If the receptionist is listening carefully, she will hear that the patient is trying to communicate that he is frustrated and angry that he has waited so long. Her response should stop or ease the patient's frustration.</li> </ul>
<b>Listen to what is not being said</b>	<ul style="list-style-type: none"> <li>• When a person is upset, they will leave out vital parts of information.</li> <li>• If you are dealing with an upset customer, always ask questions to access the information that may be missing.</li> </ul>
<b>Do not make judgments or get defensive</b>	<ul style="list-style-type: none"> <li>• Always listen to your customers, regardless of their age, where they come from, what they look like or how they sound. The same applies when a person is critical and abusive.</li> <li>• The best form of defence is to listen without any reaction. This will help to get the conversation back on track.</li> </ul>
<b>Listen in silence</b>	<ul style="list-style-type: none"> <li>• Keeping quiet while the other person speaks is a good sign that you are listening. However, this does not mean you should be silent for long periods of time.</li> <li>• Good listening skills are shown by not interrupting and responding after the person has finished talking.</li> </ul>

## Body language

**Listening and understanding customers involves paying close attention to not only what they say, but how they say it.**

Did you know that a significant amount of our communication is conveyed through body language?

Watch your customers' body language. Look at how they stand, their gestures and their facial expressions. They may not be saying anything; however, by focusing on their body language, you can often pick up whether they are happy or unhappy, impatient, relaxed, inquiring, decisive, angry, frustrated, confused, clear, and so on.

Here are some body language cues to pay attention to:

- voice, pace of speech, tone and volume
- appearance
- facial expression
- eye contact
- posture
- the way you move
- the gestures you make.

## Ask questions

Some customers may have difficulty explaining what they want to know or they may not be sure which service or product would be suitable. Other customers may be difficult to understand due to language issues or sound quality if using the phone. Customers may also have difficulty understanding what you are saying.

Asking questions will clarify whether:

- you have understood what the customer has said
- the customer has understood what you have said
- you have correctly identified what the customer needs.

Questions are often classified as being 'open' questions or 'closed' questions. They are used in different situations to elicit specific types of information.

Here are some descriptions and examples of closed and open questions.

### Closed questions

Closed questions are questions that can be answered with 'yes' or 'no' or in very few words. They are used to start a conversation and obtain routine details from the customer. For example:

- Have you used our products before?
- Are you paying by credit card?
- Would you prefer a 10.30am or 2.30pm appointment?

### Open questions

Open questions are useful for obtaining more information and focusing on what the customer wants. These questions require a person to explain or describe what they want in more detail. They usually begin with 'what', 'how', 'why', 'when', 'where' or 'tell me about ...'. For example:

- How can I help you?
- How do you keep track of your customers at the moment?
- Why are you looking to change providers?
- What kind of food would you like served at the reception?
- Where are some places you have listed on your bucket list?
- Could you tell me a bit more about the products you are using at the moment?

## Example

### Ask questions to identify customer needs

Michael works for an events management company that organises seminars and conferences for businesses. A customer, Sondra, phones, wanting a quote for a two-day seminar for her firm, which is bringing together 20 of its representatives from around the country.

Michael explains the various options and costs associated with:

- venues – their capacity, location and accessibility
- equipment available for hire
- availability of technical support
- catering
- services offered by the company, such as travel and accommodation arrangements, sourcing keynote or after-dinner speakers, printing agendas and session handouts, and arranging for a trade exhibition at lunchtime.

Michael asks Sondra questions to ensure that the image he has of this seminar is similar to the one she envisages. He finds out:

- the purpose and subject of the seminar
- when it will take place
- where the client would like the seminar to be held; for example, a beach resort, city convention centre, rooms in an educational institution or local council buildings
- what style of after-dinner speaker would suit the seminar attendees – humorous, motivational or business-focused
- what equipment will be needed
- the style and price of catering required.

The answers to these questions provide Michael with a deeper understanding of Sondra's needs. Focusing on Sondra's responses prevents him from wasting time offering her unsuitable services and helps Sondra create a successful occasion.

## Summarising a discussion

Summarising usually takes place at the end of an interaction with a customer; however, it can also take place if you need to clarify information along the way. This involves repeating in your own words, or paraphrasing, the key details or requests.

You can even tell the customer what you are doing; for example, you might say, 'I'll just repeat that to make sure I understand. You are interested in the 10-day leisure cruise around the Whitsunday Islands, commencing on the third of April. Is that correct?'

By summarising, you:

- allow yourself to be sure you have heard correctly
- reassure the customer that they have been listened to
- allow the customer to clarify any misinformation
- reduce misunderstandings.

## Practice Task 1

### Question 1

---

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

- There are two types of customers: internal and external.
- Internal customers exist in organisations.
- External customers can be identified from an organisational chart.
- Customers can be from other organisations, businesses or government departments.
- Details of internal customers are usually kept on a client management system.

## Question 2

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List three methods of conducting primary market research.

## Question 3

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What are four key strategies for communicating effectively with customers?

## Question 4

---

Your manager has asked you to conduct some secondary market research on a product. Tick all the sources you could use for secondary research.

- Newspapers
- Public research
- Journals
- Customer interviews
- Focus groups

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

## Case study

Jonah is working in a travel agency. An executive assistant (EA) calls from a marketing company and says he has been asked to book a working trip for his boss to attend a conference in Europe.

## Question 5

---

List three closed questions and three open questions Jonah could ask the customer.

# 1B Determine the urgency of a request

---

**Prioritising customers' requests and meeting their timelines is critical to retaining customers.**

In today's world people often expect their needs to be met immediately. Technology is frequently blamed for this. The internet can meet the need for information in a matter of seconds; banking can be done online or over the phone; fast food is delivered to your door. In the business world, customers look for suppliers who can provide a quality product or service quickly.

However, this is not always possible, especially when dealing with large numbers of customers, so understanding deadlines, prioritising service and dealing with possible delays are critical skills for building any business and retaining customers.

## Responding immediately

**Responding immediately is a general rule of good customer service.**

When talking with a customer, always find out whether they have an urgent requirement. Get the necessary information by listening and asking questions.

Where possible, ensure that you have information on hand to meet the customer's needs. Sometimes it will be easy to provide the requested information, product or service very quickly, if not immediately.

Your customers want to be reassured that you understand the urgency of their request and that you will do everything in your power to ensure that something will be done.

## Delivering what you promise

**Special deals or offers for customers are key in competitive markets.**

As part of their marketing strategies, some companies promise to deliver goods or services within a specific time; for example, a 24-hour turnaround or within one week of placing the order. When this information is known by a customer, there are greater risks in not meeting the timelines. The organisation's credibility is at stake.

The person taking the request needs to identify any factor that might interfere with the organisation meeting its promise; for example, if the customer lives in a remote part of Australia where delivery services are infrequent.

Clarifying the urgency of an internal customer's request is necessary so that tasks are allocated fairly, and only truly urgent tasks are attended to out of schedule. It is also necessary so that, where possible, special needs can be met without disadvantaging other customers.

## Handling delays

Delays are often unavoidable. How you handle delays will impact your customer loyalty.

Reasons for delays may include:

- information needing to be obtained from someone else before it can be passed on to the customer
- another person having to confirm availability before an appointment can be verified
- the product a customer has ordered not having arrived from the supplier
- a replacement product having to be authorised by a more senior person.

## Keeping the customer informed

Effective communication strategies can be applied to deal with delays and retain customer confidence.

Delays can be particularly frustrating for customers, so it is important to use communication skills effectively to explain the delay.

If you become aware that a customer's requests are delayed:

- contact the customer immediately
- explain the reason for the delay
- empathise with the impact on the customer
- propose solutions to alleviate the customer's stress
- ask questions to determine the best course of action.

If the customer will not accept your alternate course of action, contact your manager.

## Practice Task 2

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

### Case study

A customer purchases a printer and a computer from a small IT retail outlet. A condition of the purchase is that two training sessions will be provided within one week of the delivery of the goods. After 10 days the customer has not been contacted by a specialist about the training session. She calls to complain.

The receptionist receives the call, obtains details from the customer (including the date of purchase and the products purchased) and explains to the customer that he will transfer her to the specialist concerned. The specialist is busy on another call and the customer says she is not happy to wait.

### Question 1

---

What options are open to the receptionist now? Tick the correct answers to identify how the receptionist could respond to the customer's request.

- Listening carefully to the customer and empathising with her situation
- Demonstrating understanding to alleviate the customer's stress
- Finding an alternative specialist to speak to the customer straight away
- Obtaining the necessary information from someone else and passing it on to the customer
- Asking the customer to call back at a more convenient time

### Question 2

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What is the likely outcome if the customer hangs up in anger at this point?

### Question 3

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If the situation cannot be resolved, the customer could (tick all that apply):

- go to the company CEO
- make a complaint
- provide negative feedback to the organisation
- damage the organisation's reputation through word of mouth.

### Question 4

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If this lack of follow-up is a common occurrence, should the receptionist talk to the manager about the matter? Explain your answer.

# 1C Match customer needs with appropriate products or services

---

In order to provide accurate and relevant information to customers, you need an excellent understanding of the products and/or services your organisation offers.

Customers are more likely to trust salespeople who are knowledgeable and confident in the products and services being offered.

## Understanding your organisation

Become an expert on your organisation.

Information about the organisation and its purpose can be found in annual reports, business plans, organisation newsletters, induction kits, promotional material and the organisation's external website.

For new employees, most organisations conduct induction programs that cover all areas associated with the business. In larger firms, new staff members are often rotated through different departments before taking up the position they were hired for.

Workplace rotations enable employees to learn:

- what the organisation offers
- what each area contributes to the organisation's output
- how their new role contributes to the organisation.

## Maintaining confidentiality

Understanding what information is suitable for the public is critical for good customer service, for keeping your job and for protecting your company.

All organisations have information about their products and services that should not be given to people outside the organisation. For example, your organisation may be producing a new product and does not want details released before a certain date.

It is extremely important to find out the policies and procedures relating to the release of your organisation's information, product or service.

### What you can do to ensure you maintain confidentiality

- Ensure that the correct procedures are followed and that you only give out appropriate, non-confidential information.
- Know your duties and responsibilities regarding confidentiality, as defined in your employment contract.
- Ask your trainer, manager or colleague to advise what is and isn't confidential.
- Find out why the information is confidential and what to do if a customer's query relates to this information.

## Understanding products and services

Being knowledgeable about products and services builds confidence.

It is important that you keep up to date with product development so you can identify trends as they occur and are able to explain to customers when a new product or service is coming on the market. Equally important is the ability to analyse the market and know where your products and services are positioned so you can target appropriate customers.

## Providing promotional material

Supplying promotional material quickly encourages a proactive image of an organisation.

Promotional material may include online advertisements, social media releases, brochures, flyers, catalogues, order forms, policy documents, paper-based or electronic price lists, presentation packs and websites.

Some organisations require staff to keep a collection of brochures, catalogues, price lists and available services at their desks. Alternatively, specific areas may be set aside for storing frequently requested information.

Make sure you know where the promotional materials are located, whether they are current and your organisation's policy for forwarding this information; for example, via email, courier service, and so on.

### Tips for using promotional material

Keep a list of the most frequently asked questions and their answers. Categorise the questions; for example, questions about the services offered or delivery options.

Keep handy the current specials, discounts or offers; a catalogue, price list or order form; and a supply of up-to-date promotional material.

Refer customers to your website (if appropriate).

To be able to provide customers with enough appropriate product or service information to help them make a choice, you need to be able to explain a variety of things about the product, including those outlined in the following table.

<b>Product features and benefits</b>	<p>Features characterise a product or service. Examples may include a product's purpose, size, cost, attachments and models; and extra services that come with the product, such as free training.</p> <p>Benefits are the advantages the product or service will give the customer.</p> <p>Common benefits include:</p> <ul style="list-style-type: none"> <li>▪ saving the customer time</li> <li>▪ saving the customer money</li> <li>▪ providing security or reassurance</li> <li>▪ being convenient</li> <li>▪ being adaptable.</li> </ul>
<b>Costs</b>	<p>Learn your organisation's pricing structure as well as pricing policies and procedures.</p> <p>Common questions asked by customers about costs include:</p> <ul style="list-style-type: none"> <li>▪ the price of a single item</li> <li>▪ the price for a bulk purchase</li> <li>▪ discounts for special offers</li> <li>▪ how the payment is calculated; for example, hourly rate or a set fee</li> <li>▪ any additional handling costs</li> <li>▪ the costs involved in returning an order</li> <li>▪ how the price has been calculated; for example, type of model purchased, discount offered or GST applied</li> <li>▪ payment terms; for example, credit terms or automatic billing.</li> </ul>

<b>Available discounts</b>	<p>Be aware of any discounts available to customers. These may be the deciding factor of a customer's choice.</p> <p>Common discounts include:</p> <ul style="list-style-type: none"> <li>▪ 'from time to time'; for example, '10 per cent off all stock during July'</li> <li>▪ 'on specific items'; for example, '20 per cent off brake testing'</li> <li>▪ 'when buying in bulk'</li> <li>▪ 'for people who book early'</li> <li>▪ 'for groups of 10 or more'.</li> </ul>
<b>Special offers</b>	<p>Special offers are also known as 'add-ons' or 'value-added features' and may be offered as a one-off or an ongoing arrangement. This does not necessarily mean an extra cost to the customer.</p> <p>Special deals used to promote a product or service may include:</p> <ul style="list-style-type: none"> <li>▪ 'buy three, get one free'</li> <li>▪ 'receive a gift with every purchase'</li> <li>▪ 'join now and get a month's free membership'</li> <li>▪ 'one month's free trial'</li> <li>▪ 'free installation'</li> <li>▪ 'bulk purchases'.</li> </ul>
<b>Stock availability</b>	<p>Some products may be in stock and ready for distribution, while other products may have to be ordered from overseas or from another department, which will impact delivery times.</p> <p>Supply and delivery of products may depend on driver availability or postage schedules, the customer's location (e.g. in rural areas), popularity of the product, services being booked out this month, and so on.</p> <p>Be aware of all the reasons that a product or service may not be available. Have current information available in order to quickly advise a customer and if you are unsure, check your facts before returning a call to the customer.</p>
<b>Packaging and delivery options</b>	<p>Customers need to know exactly when and how the delivery will take place and how much it will cost. An organisation's delivery method for products may include post, air, courier, and electronic or personal delivery.</p> <p>When explaining delivery options, mention:</p> <p>the organisation's arrangements for urgent deliveries. This might involve a courier and incur special costs. Explain how urgent orders are processed whether customers are required to be in attendance for drop off and/or signing or for the installation of a product such as curtains.</p> <p>Ask how internal customers would like their work delivered, (e.g. by email or a hard copy, phone call or face to face).</p>

<b>Competitors' products and prices</b>	<p>Research similar products or services offered by competitors. This enables you to promote the benefits of your organisation's product over the competitors', advise whether it is cheaper or lasts longer, and so on.</p> <p>If a customer asks for a service that your organisation does not offer, refer them to an organisation that does offer the service. This demonstrates that your organisation is helpful and willing to please.</p> <p>It is better to satisfy customers and tell them about other ways the organisation could help them in the future, than to convince them to purchase something that doesn't currently suit their needs.</p>
<b>Payment options</b>	<p>Payment is usually carried out in one of two ways, as described below.</p> <ul style="list-style-type: none"> <li>▪ <b>Paying directly:</b> <ul style="list-style-type: none"> <li>– Customers may purchase the product or service directly and pay using cash, cheque, money order or credit card on delivery of the goods; over the phone using a credit card; online via the internet; or with a cheque or money order sent through the mail.</li> </ul> </li> <li>▪ <b>Having an account:</b> <ul style="list-style-type: none"> <li>– Customers may have an account with an organisation with arranged payment terms and methods. For example, a retail food business may not have to pay for goods purchased from a wholesaler until 30 days after delivery.</li> </ul> </li> </ul>
<b>Refund policies</b>	<p>Understand your organisation's policy and procedure for handling replacements or refunds and giving credit. Being able to tell a customer they are eligible for a replacement or refund is good customer service.</p> <p>Generally, refund conditions are clearly explained to the customer prior to purchasing or booking, or they are printed on the registration form.</p> <p>An organisation may prefer to give customers a replacement product or service – or an exchange, whereby they can swap the product for something else – rather than a refund. Certain conditions can apply if a customer wants to return goods.</p> <p>If the fault lies with the customer, you may be permitted to offer to accept the goods as long as the customer pays the postage. If your organisation is at fault, you may be authorised to send a courier to collect the goods, send a replacement immediately or perhaps do both, in addition to offering an additional 10 per cent discount on future purchases, for example.</p>

## Monitoring your own performance

Being able to manage your own learning contributes to your value as an employee and helps you progress in your career.

Regularly monitor and evaluate your performance in customer service and identify your strengths and weaknesses. Identify any skills gaps you need to address.

Be aware of your organisation's processes for seeking new learning opportunities through a professional development program. Ask your manager for advice. Watch how experienced colleagues deal with customers. Take advantage of offers to attend customer service seminars or workshops.

Reflect and ask yourself:

- How well do I know my organisation's range of products and services?
- Am I familiar with all my organisation's promotional material and its purpose?
- How well do I understand my organisation's customers?
- Do I feel confident when dealing with customers?
- How might I improve customer service?

## Example

### Know your organisation's products and services

Saskia works for a local council. A customer calls wanting to know about hall-hiring fees. Saskia explains the standard fees that apply for the basic hall hire and then questions the customer to find out exactly what kind of function it is going to be. She explains that the council offers a range of options the customer may not be aware of. These include:

- dividing the hall in two for smaller functions
- complimentary tea and coffee for guests on arrival
- hire of crockery
- hire of trestle tables
- hire of pot plants
- choice of three bands
- a 10 per cent discount on hall hire cost the next time the customer hires it.

## Practice Task 3

### Question 1

When selling a product or service it is important to highlight the key features. What are the features of a product? Tick all that apply.

- size
- price
- convenience
- colour
- model

## Question 2

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When selling products and services it is vital to understand your organisation's pricing structure and procedures. List six things that may be included in an organisation's pricing policy.

## Question 3

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What are three benefits of knowing about your competitors' products and services?

## Question 4

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Select from the list below the learning options that may help you improve your customer service skills. Tick all that apply.

- On-the-job training, mentoring or coaching
- Reflecting on your own experience with customer service
- Researching competitors' products and services
- Training with your competition
- Internal staff training specific to the organisation

# 1D Seek assistance to meet customer needs

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Knowing when you can't meet a customer's needs and finding an alternative is a sign of intelligent customer service.

There will be occasions when you can't give a customer all the information they need because it is outside your area of responsibility or expertise. In these instances, you must follow your organisation's procedures.

It may be necessary to:

- contact an appropriate person in the same area or department, such as a colleague or supervisor, to find out the information
- redirect the inquiry to another person or department
- make an appointment for the customer with an appropriate person.

## Recording customer interactions

Recording and tracking customer inquiries enables organisations to streamline their processes and service.

Be sure to record any inquiries, issues or actions taken with customers. Information needs to be recorded accurately and clearly so other staff members are able to follow the customer's inquiry and ensure the issue is attended to in a timely manner.

When dealing with phone inquiries, remember to keep handy a staff directory or a list of products and services and people responsible for them. If an appointment with another staff member needs to be made for a customer:

- follow your organisation's policies and procedures
- place the customer briefly on hold while the query is explained to the other staff member, so the customer will not have to repeat themselves
- document the actions taken in case a colleague needs to follow up.

Poor communication between internal departments or colleagues can lead to poor customer service and a potential loss of business.

## Creating a customer database

Customer databases enable organisations to target their marketing, improve their product and address distribution issues.

Every organisation has a different way of recording interactions with its customers. A recording system may be computer based or paper based. Some use a code to record the contact information. Some require a record of every contact made with a customer. Others require customer details to be recorded only if an order has been placed. Many organisations use specific customer management software.

Follow the organisation's policies and procedures for keeping a record of customer contacts. Ask your supervisor to explain the system to you, and how the organisation uses the information.

When recording customer service details:

- make sure you record the correct information
- listen carefully and repeat the customer's name, address and contact phone number
- don't be afraid to ask the customer to repeat anything that is unclear.

## Example

### Information obtained from a customer

Client record form					
Name and contact details	Date and method of contact	Reason	Information given	Action taken	How did the customer know about Acme Painters?
Jim Pugh 26 Bass Road, Hollowdene Tel: 03 5641 9010	4 April; telephone	Quote for painting house	Ben can give a quote this week. Job can be started as soon as quote is accepted.	Arranged for quote 7 April 9.30am	Telephone book
Cherie Li Electrical Bits 4 Main Road Manindra Tel: 03 8930 3269	5 April; on-site visit	Can company paint factory exterior?	Acme Painters only does domestic painting	Gave names of two appropriate companies that specialise in commercial work	Ad in local paper
Mick Doneri 35 Stapleton Road Creyton Tel: 0411 481 111	5 April; telephone	Wants to arrange painting of interior of house	Provided suitable times for job	Tentatively arranged for job to be done; will confirm with Ben	Used Acme before

## Following up

### Go the extra mile and follow up with customers.

Always follow up any actions that have been recorded to check the action has taken place and the customer is satisfied.

For example, if promotional information has been sent to a customer, contact them within a selected time frame (e.g. two weeks) to inquire whether they received the material. This is good public relations and provides you with an opportunity to ask whether there is anything else that can be done for them.

When a message is left for a colleague to contact a customer, check whether the colleague contacted the customer. Often, customer service fails when communication between internal parties breaks down.

Record and document the time, date and how the issue was addressed for the customer.

## Practice Task 4

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

### Case study

A customer rings your organisation and is very angry because he spoke with a customer service officer three weeks ago, who promised to arrange for delivery of some promotional material within a week. It is now three weeks and the promotional material has not arrived. You were not working that day and the other customer service officer, your colleague, says he can't remember talking to the customer.

### Question 1

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- a) List three things you would do to appease the customer.

- b) What are two ways this situation could be avoided in the future?

## Question 2

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List three ways you could seek appropriate assistance to help you address a specific customer's needs.

## Summary

- Customers can be both external (outside an organisation) and internal (inside an organisation).
- Quality customer service is the key to success for all organisations.
- Providing good-quality service depends on the following effective communication skills:
  - being able to actively listen to customers
  - reading body language
  - speaking and asking questions to clarify, suggest and recommend
  - researching, writing and reading information from product lists, brochures, websites, and so on.
- Customers expect fast, friendly and quality service. Prioritising urgent customer needs enables organisations to service high volumes of customers, efficiently.
- Customers are often not sure what they want. As a customer service provider, you must:
  - identify what the customer really wants
  - have a sound knowledge of all the products and services on offer so you can provide the customer with appropriate options
  - do research to understand the competition for your organisation's services and products
  - follow your organisation's policies around pricing, delivery and special offers
  - keep informed of your organisation's policies on refunds and customer service.
- Recording and tracking customer contacts enables organisations to streamline and improve customer service.
- Seek out colleagues, supervisors and professional workshops or courses to build your customer service knowledge and skills.

# Learning Checkpoint 1

## Identify customer needs

### Part A

1. What information do you need to know in relation to products or services to assist customers? List at least three answers.

2. How would you assist a customer who is not really sure about a product or service? Tick all that apply.
  - Explain all the products available in your catalogue.
  - Ask them for more information about the intended purpose of the product or service.
  - Ask whether they have used a similar product or service in the past.
  - Ask whether they have a brand they like or a reason why they would like to use the product or service.
  - Ask them to come back when they are sure about what they want.
3. Select what you would do if a product was temporarily unavailable. Tick all that apply.
  - Offer an alternative product that meets their needs.
  - Tell them it will be available soon.
  - Advise the customer on the process involved in acquiring the product and any wait times.
  - Suggest they look elsewhere.
4. Explain what you would do if the customer wants the product or service urgently and you know that the next delivery is in three days' time. Tick all that apply.

- Tell them to come back in a week.
- Tell them it will be available soon.
- Advise them on the process involved in acquiring the product.
- Suggest they wait for three days and then you will contact them to let them know when it is in.

5. A customer is trying to find a product but cannot remember the name of it. What questions or statements will help the customer communicate their needs and expectations? Tick all that apply.

- Why did you forget to bring the product with you?
- What was the product used for?
- Describe the packaging of the product.
- Describe the product texture.
- When did you last purchase it and do you know who served you?

6. Suggest four reasons why it is important for an employee to reflect on their own practice and actively seek ways to develop further skills and improve their performance.

## Part B

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

### Case study 1

Leisha and Rami work for Oshkal T-shirts. Most of their customers purchase in bulk; for example, thousands of T-shirts will be sold on a concert tour or T-shirts are purchased for a football team and its supporters. Occasionally, they do a small print run or an individual T-shirt, although this is much more expensive per item.

Leisha takes a call from a customer asking if she could do an urgent print run of 45 T-shirts for a class reunion to be held the following Saturday? Leisha is in a rush to get to a training session but she checks the printer's order book and sees that they have some downtime on Wednesday. She tells the customer that it will be possible and she should bring a copy of what she wants imprinted on the T-shirts into the office that afternoon.

In the early afternoon, Leisha's colleague, Rami, is working behind the counter. The customer arrives with a class photo from 1972. It is quite faded and has poor definition of the 25 faces in the class. Rami explains that Leisha took the call and has not left instructions.

The photo is much too faded to scan clearly, especially as it requires non-standard colours. He cannot guarantee the image will be crisp on the T-shirts.

- The job is much more complex than the straightforward scanning Leisha imagined and therefore might not be finished on time. What will Rami have to consider to satisfy the customer? Tick all that apply.
  - Explain the misinformation to the customer.
  - Explain that Leisha is not available and the customer will have to come back.
  - Offer some sort of compromise to help the customer with a solution for her urgent task.
  - Improve the way customer needs and expectations are clarified so no misunderstandings arise in the future.
  - Deal with the customer's likely reaction.
- What could Leisha have explained to let the customer know the limitations that needed to be placed on her order? Tick all that apply.
  - The image needs to be clear or it will be blurry on the T-shirts.
  - If you bring in your photo today, our printers will confirm the time it will take.
  - Non-standard colours will cost more, and they may not be able to exactly match them.
  - Everything will be fine, and they will sort it out later.

3. Rami is developing a spreadsheet to identify various product features. Draw lines to match each item heading on the left to its description on the right.

» Item description	» Cotton, Polyester, Poly / Cotton Blend, Wool blend
» Standard colours	» XS, S, M, L, XL, XXL
» Material	» Day: Month: Year:
» Sizes	» This could include branded shirt, construction worker, company fundraiser, office uniform, personal
» Required date and time	» Blue, Black, Yellow, Magenta, White

## Case study 2

Chen is an administration officer in a legal firm. Some very important clients are visiting in two weeks and they will be having a sit-down hot lunch in the boardroom with the senior legal practitioners who handle their caseload.

Chen's supervisor has asked him to obtain information about catering firms in the area.

Chen finds the catering file to see what firms the organisation has used before, checks the internet for names of other local caterers and asks colleagues for the names of firms they could recommend.

The supervisor tells Chen that the senior partners would like to make the final decision regarding the caterers and the menu for the day. However, she has not told him what information should be provided, how it should be formatted or when it is required.

1. What questions does Chen need to ask his supervisor to clarify her needs and expectations? Tick all that apply.
  - Does he need to consider cost and location?
  - Does the boardroom have comfortable chairs?
  - Should he put all the options into a table or spreadsheet?
  - Do any of the guests have dietary requirements?



## Topic 2 | Deliver customer service

- 2A Follow organisational and legislative requirements for customer service
- 2B Establish a rapport with customers
- 2C Handle customer complaints
- 2D Deliver a high-quality service to customers
- 2E Promote products and services

## 2A Follow organisational and legislative requirements for customer service

Part of any employee's job role is to be aware of their organisation's standards, legislation, organisational policies and procedures, and customer service charters.

### Customer service charters

Organisational guidelines and policies set specific customer service standards and guidelines.

Organisations use specific customer service tools to provide good service. These include customer service charters, and quality management systems and standards.

Customer service charters provide information and direction to staff and customers, describing the standard of service and delivery expected in and from an organisation. They often set the benchmark for customer service, and your performance may be evaluated against these benchmarks.

Customer service charters can also include the means of lodging a complaint if the standard is not met. Sometimes the charters are quite specific and complex; sometimes they are brief statements outlining the values and ethics of the organisation.

You will also find customer service charters in the non-commercial world, such as government departments, to hold public servants accountable for the services they provide.

A customer service charter may include the following.

#### An overview

The customer service charter might begin with an overview of the organisation, including its mission statement, its organisational goals and how these relate to the customer.

#### Customer rights

The customer service charter may describe the customers' rights and expectations, such as expected time frames for customers to receive their goods or services, or an outline of the organisation's complaints-handling procedures.

#### Reassurance

The customer service charter aims to reassure customers that the organisation will deliver quality service and any details pertaining to legitimate reasons for refunds or returns.

The Office for Recreation and Sport is a state government agency with a commitment to promoting growth and excellence in recreation and sport for South Australia.

The following excerpt is from its customer service charter.

## Example

### Government agency customer service charter

#### Office for Recreation and Sport, South Australia

Our commitment to service for internal customers:

- We will facilitate teamwork at all levels.
- We acknowledge that our performance may affect other staff members' efficiency and effectiveness.
- We will share information with each other to increase our knowledge of the industry.
- We will communicate openly and honestly and maintain confidentiality where appropriate.
- We will facilitate teamwork at all levels.
- We acknowledge that our performance may affect other staff members' efficiency and effectiveness.
- We will share information with each other to increase our knowledge of the industry.
- We will communicate openly and honestly and maintain confidentiality where appropriate.

## Quality assurance and customer service

Large organisations have quality assurance systems, managers and/or departments to monitor the standards in their organisation.

For many organisations, a customer service charter is just one tool in their quality assurance (QA) system. A QA system includes the documentation, monitoring and review of policies and operational procedures across all facets of the organisation.

Some organisations maintain a simple QA system with in-house policies and procedure manuals against which all work practices are reviewed and improved annually.

Other organisations belong to much larger QA systems recognised Australia wide or internationally.

The International Organization for Standardization (ISO) is a worldwide federation of national standards bodies. These standards guide companies and organisations to ensure that their products and services consistently meet customers' requirements and that quality is consistently improved.

To retain their standards rating, organisations must demonstrate that all members of staff are aware of, and can carry out successfully, their roles and responsibilities in the production, sale, delivery and after-sales follow-up of goods and services.

Standards in the ISO 9000 family include:

- ISO 9001:2008: sets out the requirements of a quality management system
- ISO 9000:2005: covers the basic concepts and language of a quality management system
- ISO 9004:2009: focuses on how to make quality management systems more efficient and effective
- ISO 19011:2011: sets out guidance on internal and external audits of quality management systems.

## Understanding legislation

### Organisational customer service policies must adhere to legislative requirements.

When delivering a service to customers, you need to be aware that your role and responsibilities include complying with federal, state or territory legislation as well as guidelines relating to your workplace.

Your organisation should have embedded relevant legislation and other practices into its policies and procedures; if you follow these, then you are meeting your obligations in the workplace.

Taking responsibility for understanding and applying organisational policies and procedures, and legislative requirements, is an important part of an employee's role. Make sure you know what processes you are expected to follow and who to ask for advice if you are uncertain about what to do.

Consumer law outlines the rights and responsibilities for customers when they are purchasing items and paying for a service. For example, if the product or service you are providing includes information about product safety or a warranty period, then the consumer will need to be provided with this information at the point of sale.

Some of the key federal laws that govern the rights and responsibilities of employers, employees and consumers are listed below.

Examples of important legislation
▪ <i>Work Health and Safety Act 2011</i> (Cth)
▪ <i>Racial Discrimination Act 1975</i> (Cth)
▪ <i>Age Discrimination Act 2004</i> (Cth)
▪ <i>Disability Discrimination Act 1992</i> (Cth)
▪ <i>Sex Discrimination Act 1984</i> (Cth)
▪ <i>Australian Human Rights Commission Act 1986</i> (Cth)
▪ <i>Privacy Act 1988</i> (Cth)
▪ <i>Competition and Consumer Act 2010</i> (Cth)
▪ financial legislation relating to the banking, finance or insurance sectors
▪ laws specific to your state or territory

## Practice Task 5

### Question 1

Which of the following could be found in a confidentiality, dignity and privacy policy? Tick all that apply.

- Customer service charters explain the standards of customer service expected in an organisation.
- Customer service charters are written for organisations dealing with external customers only.
- Customer service policies and procedures are stored on Quality Assurance Systems (QASs).
- Understanding organisational and legal policies is the role of a manager.
- Failing to provide good customer service is punishable by law.

## Question 2

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Which of the following laws would organisational policies in a workplace refer to? Tick all that apply.

- Consumer protection laws
- Racial discrimination act
- Traffic laws
- Sex discrimination act
- Work health and safety act

## Question 3

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

- The *Competition and Consumer Act 2010* aims to give business a fair and competitive operating environment.
- The *Competition and Consumer Act 2010* covers anti-competitive conduct and price fixing.
- The *Competition and Consumer Act 2010* lobbies the government to decrease competition nationally.

## 2B Establish a rapport with customers

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Establishing rapport is vital in building and maintaining a relationship with customers.

Within seconds, a customer can assess the competence and sincerity of a person in a customer service role. By listening and watching, a customer will determine whether to trust and connect with that person. This is called rapport (pronounced ra-pore).

Rapport is the process of building a relationship of mutual harmony and understanding. People who build rapport have the ability to be on the same wavelength: to connect and emotionally bond with another person. So much of the customer's perception of your sincerity comes not from what you say, but from how you say it and how you show an appreciation for the other person's thoughts and feelings.

If you establish rapport with a person, you build a climate of trust and respect. Having rapport does not mean that you have to agree, but that you understand where the other person is coming from.

### Tips for building rapport

You can learn and practise strategies for building rapport.

Rapport can be established on the phone, using email, through documents and from face-to-face contact. Rapport can be developed on many levels over a period of time.

Although some people seem to have a natural talent for building rapport and making people feel at ease, it is a skill that can be developed by understanding and following a few strategies.

Here are some tips for building rapport with your customers:

- Take a genuine interest in the customer.
- Understand how the customer deals with information; for example, do they like detailed information or information sketches?
- Take the time to understand the customer's real intention.
- Notice and respond to the customer's body language, gestures, voice tone and voice speed.
- Respect the customer's time, personality and interests.

## First impressions count

First impressions have the ability to make or break a business relationship.

You are representing your organisation and your product or service when you engage with customers. Your appearance, what you say and how you sound will give people a lasting impression. It is therefore important that all the parts are working together: the words, pictures and sounds.

Strategies for making a good first impression are listed below.

<b>Have a positive voice</b>	To make an initial positive impression, start with your voice. Greet the customer with a positive statement such as 'Good morning, how are you today? How can I help you?' Depending on the type of business you are in, ask the customer for their name or if you know the customer, use their name to show you remember them.
<b>Ask for the customer's permission</b>	When you ask a person's name, always ask their permission to use it. Generally people like it when you use their names. It gives them the impression that they are not just some nameless, faceless entity.
<b>Dress professionally</b>	Dress professionally and ensure that the service area is tidy and well set out. Professional presentation helps to convey a dependable, secure and considerate image. Little extras can make a big difference; for example, in a reception area a bowl of sweets, a vase of flowers, a basket of toys, a collection of current magazines and some appropriate music can encourage the customer to relax.
<b>Demonstrate confidence</b>	Demonstrate confidence and pride in your organisation's products and services.
<b>Communicate effectively</b>	Rapport is continually developed when you use active listening and questioning techniques. Never interrupt your customers. Listen in silence and let them speak about what they require.
<b>Show genuine interest</b>	Watch effective salespeople or customer service personnel in action and you'll see how they master the art of building rapport with their customers. They demonstrate genuine interest. They listen, listen and listen some more to what the customer's needs are and what they really want before trying to sell them anything. People dislike being sold to, but they love to be listened to and to talk about what's important to them.
<b>Know your products</b>	Customers prefer to deal with service providers who have established rapport and are knowledgeable about the features and benefits of their products or services. The customer will quickly pick up whether you have enough time and patience to explain the features of a product or service. In some instances, the customer does not want to know about the fine details of each product or service but will rely on the recommendation of the person serving them. The organisation's reputation then relies on the assistant making the best possible match between the customer's needs and the product or service that will meet them.

<b>Demonstrate enthusiasm</b>	Customers are likely to go elsewhere for their purchases if they have not established rapport and detect a lack of enthusiasm from the service provider.
<b>Offer guidance</b>	Where products are on display, customers appreciate being guided to appropriate areas. Many customers will then be happy to browse and will call for assistance when they want specific help. Don't 'oversell' at this point by being too forceful or over-enthusiastic. For each customer, a balance needs to be struck between offering informed help and pushing too hard for a sale. Quiet confidence is the key.

## Maintaining rapport with customers

Rapport with customers continues through to the final transaction of a purchase.

Your customers will begin to trust you if you keep your word and maintain rapport right through to the end of the sale or purchase.

Maintaining rapport with customers requires commitment and effort. Being sensitive to customers' changes in attitude and comfort level from the first interaction makes it much easier to know how to deal with them in the future, but it is important to constantly look for signs of change in attitude or energy levels.

Maintaining rapport with customers has many challenges and may vary depending on the medium used for contact.

Beware of these potential pitfalls in maintaining rapport with customers:

- Send regular email messages but don't over-market to customers.
- Determine a convenient time to call a customer if they prefer to talk on the phone.
- Inform your customers via text if they are keen on having the latest products or alerts for specials offers but wait for them to respond.
- Maintain professional boundaries with your customers.

## Practice Task 6

### Question 1

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What does rapport describe? Tick all that apply.

- A relationship of mutual harmony and understanding
- Being the most popular person in your workplace
- The ability to be on the same wavelength
- A connection and emotional bond with another person
- Building a climate of trust and respect

### Question 2

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List four strategies for building and maintaining rapport with customers.

## 2C Handle customer complaints

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Every customer complaint gives an organisation opportunity to improve.

All organisations receive complaints from customers from time to time. Complaints may come from internal or external customers.

While no organisation likes to receive complaints, if handled correctly, they can provide an opportunity to improve services and retain more loyal customers.

Approximately 50 per cent of customers who do complain will continue doing business with the organisation. However, this only happens when complaints are handled well. Other unhappy customers will walk away and tell 20 or 30 people about their bad experience/s. Many people don't complain because they don't like arguments. Others feel that it won't do them any good. Recent studies indicate that 95 per cent of people don't complain; they just don't return.

The handling of customer complaints is critical for retaining customers, improving services, building and maintaining brand loyalty and encouraging staff to strive for excellence, so aim to:

- *turn a dissatisfied customer into a happy one.* Dissatisfied customers can do the organisation irreparable harm by telling everyone they know to avoid the business
- *understand individual customer needs more clearly.* Proper recording of customer complaints can be used as a market research tool and to assist in establishing solid, personal relationships with customers
- *improve your product range and service.* Customer feedback is important and complaints are more common than compliments. Customer feedback helps the organisation better address the needs of its customers
- *increase customer and brand loyalty.* If the complaint is handled well, the customer will be impressed by the organisation, the service, the product or the brand, and they will tell their friends about it.

## Policies and procedures for handling complaints

### Complaints must be handled according to your organisation's complaints procedures and policies.

All organisations have policies and/or procedures for handling complaints that must comply with legal and ethical guidelines. These policies are often stored on QASs and should be readily available to both customers and staff.

It is important to understand your organisation's complaint procedure so that you know how to handle any complaints correctly and provide accurate information to customers about how to lodge a complaint.

A customer may report a very serious fault that has caused someone injury, has legal implications or relates to complicated financial matters. Or perhaps the complaint comes from a major customer and needs to be handled sensitively. Serious complaints will usually be referred to a senior person, such as the customer service manager, a supervisor or the executive director. However, as an employee involved in customer service it is your responsibility to understand how complaints are recorded, stored, escalated and resolved.

Read through AFTA travel service's complaint-handling brochure to understand the information they provide to their customers about complaints.

AFTA: [aspirelr.link/afta-complaints](http://aspirelr.link/afta-complaints)

Every organisation handles customer complaints differently. For example:

- Some organisations have a formal, structured system in place with specific instructions and processes to be followed.
- Organisations may rely on employees' judgment and ability to make decisions; for example, in a small business, all staff may deal with complaints.
- In a larger organisation, there may be a separate customer service or complaints division with specially trained staff.
- There may be a complaints form that needs to be filled out, along with procedures for recording the complaint and what action was taken.
- Some organisations have a policy for returned and replacement goods, faulty products or poor service.
- Customers may be asked to return goods so the customer service department can identify the fault.
- A customer service officer may be authorised to offer a full refund if customers are not satisfied with a product or service.

## Consumer protection

There are laws and regulations that protect consumers from a variety of unscrupulous business practices.

The Australian Consumer Laws are contained in the *Competition and Consumer Act 2010* (previously known as the *Trade Practices Act 1974* (Cth)), which exists to:

- ‘enhance the welfare of Australians through the promotion of competition and fair trading and provision for consumer protection.’

Core competition law provisions are contained in Part IV of the Act, including restrictive trade practices, price monitoring and disclosure, and false or misleading representations.

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

Organisations such as the Australian Competition and Consumer Commission (ACCC) offer advice to consumers about how to make and resolve complaints they may have with a business or organisation.

See their website for the types of information and support they provide to consumers: [aspirelr.link/accc-complaints](http://aspirelr.link/accc-complaints)

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

Open and honest customer communication involves:

- clearly explaining to customers the organisation's policies on refunds and replacements before they make their purchase
- always providing accurate information about a product or service, especially in relation to the price and any conditions during a sale
- ensuring customer details are only used for the purpose stated.

## Types of complaints

Complaints can relate to many different issues and both internal and external customers can make complaints.

The types of complaints received from external customers depend on the types of goods and services the organisation offers. With experience, most complaints become familiar and easier to deal with.

Here are some common causes of complaints from external and internal customers.

External customers	Internal customers
<ul style="list-style-type: none"> <li>▪ Administrative errors – incorrect client, product, quantity, price or terms stated on the invoice</li> <li>▪ Warehouse/storeroom errors – incorrect product or quantity delivered</li> <li>▪ Service errors – repair or service is not adequate</li> <li>▪ Delivery errors – products are damaged, lost or delayed during delivery</li> <li>▪ General site issues – the office is too noisy; there should be more car parking facilities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Work not completed on time or to expected standards</li> <li>▪ Facilities or resources not available when required</li> <li>▪ Mistakes made in appointments, travel itineraries or other scheduling</li> <li>▪ Inaccurate records management</li> <li>▪ Poor technical support</li> <li>▪ Poor interpersonal skills</li> </ul>

## Tips for handling complaints

Strategies for handling a complaint on the phone or responding to a written complaint are similar but have different challenges.

Each staff member has a responsibility to make customers feel that their comments are welcome and will be listened to.

You can handle customer complaints face to face or by phone:

- Speak to the customer in person if possible.
- Thank the customer for raising their complaint with you.
- Treat the customer with empathy, courtesy, patience, honesty and fairness.
- Respond to the complaint promptly.
- Tell the customer how you will handle the complaint and when.
- Show the customer that you understand.
- Investigate the situation before you speak to the customer.
- Listen intently and ask questions to clarify details about the complaint.
- Don't jump to conclusions, lay blame or become defensive.
- Focus on solutions and involve the customer in developing them.
- Negotiate solutions that are to everyone's satisfaction.
- Keep the customer updated on progress and act quickly on promises.

## Acknowledging complaints

Turn the complaint into a valuable feedback opportunity and a chance to rebuild a relationship with the customer.

When a customer complains, you should be concerned about why they are complaining and acknowledge whether they seem stressed, inconvenienced or dissatisfied.

Apologising can be a good way to acknowledge that you have heard the customer and understand their feelings about the situation.

Apologising does not mean that you (or the organisation) are responsible for the problem.

Thank the customer for highlighting the problem. Let the customer know that the organisation encourages feedback and aims to please.

## Handling complaints from difficult customers

Specific communication skills are needed to deal with angry or aggressive behaviours.

When customers appear angry or aggressive, you will need to diffuse the emotion as much as possible by using various strategies.

Strategies for handling complaints from angry customers in a controlled and professional manner are listed below.

### Listen without interrupting

- When confronted with an upset or angry customer, the best approach is to listen fully to the complaint without interrupting. Write down vital information.
- At the end of each statement, question the customer to ensure that important information is not missed. Don't argue or deny anything; just listen.

### Remain calm rather than becoming defensive

- Sometimes the customer will become abusive or critical of you and your organisation. The worst thing to do is become defensive.
- Let the customer verbalise what they are thinking and feeling. Keep listening and you will find that the conversation will eventually get back on track.
- If the customer continues with the attack, when given the opportunity summarise what you understand the problem to be and then try to solve it.

### Empathise and acknowledge the customer's position

- Use statements such as 'I am really sorry that this has occurred; I can understand how you must feel about this situation', or 'We really appreciate your business. What can we do to fix this problem?' or 'How can we solve this problem to make sure you are happy?' You will often find that the customer will calm down and be more reasonable about solving the problem with you.

### Ask questions to understand the problem

- Once the customer has calmed down, ask questions to ensure you have all the facts. Summarise the information and check in with the customer.
- Keep checking and questioning until you understand the full extent of the complaint. Keep confirming your understanding.
- Once you have all the facts, progress to the next stage.

### Establish what the customer wants

- In many instances, customers will clearly verbalise what they believe will fix the problem. This can be a sensitive area, particularly if their requests are beyond your authority or control.
- If a request is beyond your control, call a manager. The customer will then be assured that the complaint is being taken seriously by the organisation.
- If the request is not clear, keep asking the customer what they want to happen to resolve the problem. Question them in a manner that is not intrusive.
- Some customers may not want anything; they just want to let the organisation know about the problem. Always express your appreciation if you receive this type of information.

### Demonstrate a 'can do' approach to agree on an action

- Never say, 'We can't do'; say, 'We can do'. Agree on a plan of action and follow through. Be specific: explain to the customer when it will occur, by whom and how. This approach will instill confidence in the customer's belief that something is being done.

### Take immediate action and follow up

- The importance of taking action immediately must be emphasised. Your immediate priority is to assist the customer. If the agreed plan of action changes, contact the customer immediately and negotiate a new plan.
- It is important to remember that, in most instances, the customer wants to be listened to and supported.
- Once the issue is resolved, contact the customer to ensure the issue was handled satisfactorily.
- Thank the customer for alerting you to the problem. Perhaps they have provided the organisation with an opportunity to avoid it happening again by improving its systems and processes.

## Responding to written complaints

A poorly worded email can easily be misconstrued as rude or indifferent.

It is often more difficult to deal with an angry sounding email than to deal face to face with an angry customer as you are unable to judge the reader's response, mood or reaction. So it's important to choose the right words, keep it succinct and always ask a colleague to read through your response before sending it.

When responding to a written complaint it is important to:

- respond swiftly
- address the customer by the name used in their email
- acknowledge their complaint and empathise with any inconvenience caused
- possibly explain how the mistake was made (if relevant)
- offer a solution and how this will be arranged
- thank the customer for taking the time to write to you
- follow up to make sure the complaint has been dealt with (e.g. goods received, discount offered).

## Recording complaint details

Record the complaint immediately after the email/conversation/incident so no details are forgotten.

This is especially important if the complaint relates to an item's warranty or to alleged negligence in carrying out a service.

Many organisations have complaint forms for external customers to fill out, or complaint record forms for customer service officers to complete. Alternatively, smaller organisations may have less formal but just as important methods of recording the details. Make sure you document clearly the customer's contact details, date of complaint, issue, your response, follow-up actions to be taken, date follow-up actions took place and closure of complaint.

Whatever the complaint is, record the details accurately so that:

- it is clear what has happened
- they can be referred to later
- you are not relying on memory
- proof of dates, details and actions can be verified (this is especially important for serious complaints).

**Example**

**Using a customer complaints form**

Customer complaints form	
<b>Date:</b> 3/10/12	<b>Received by:</b> (Officer's name) Josh Leyton
<b>How received:</b> <input type="checkbox"/> visit <input type="checkbox"/> email <input checked="" type="checkbox"/> telephone <input type="checkbox"/> fax <input type="checkbox"/> letter	
<b>Customer name:</b> Mrs Evelyn Guthridge	
<b>Organisation:</b> -	
<b>Organisation/home address:</b> 25 Bedford Parade Bardon QLD 4065	<b>Contact details:</b> <b>Phone:</b> 07 1111 0000 <b>Fax:</b> - <b>Email:</b> -
<b>Invoice number:</b> 32100	<b>Order date:</b> 28/9/12
<b>Product/service:</b> Galvanised iron garden shed Model FA32	
1 Missing goods	4 Overcharged
2 Damaged goods	5 Wrong goods delivered
3 No discount given	6 Service not as specified
<b>Additional information:</b> Customer said an agreement was made to receive a 15 per cent discount.	
<b>Immediate action:</b> Told customer we will investigate. Thanks for calling. Will get back as soon as possible. Read file for record of transaction.	
<b>Further action required:</b> Contact customer with result.	
<b>Customer service officer:</b> J Leyton	

## Practice Task 7

### Question 1

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The purpose of organisations such as the ACCC is to assist people to understand their legal rights as consumers.

Tick the services they provide.

- Phone advice and help for consumers
- Assistance in reconciling a dispute with a business or landlord
- Legal representation in court
- Community information sessions and workshops

### Question 2

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Why is it important to accurately record a customer complaint? Tick all that apply.

- To explain the facts and point of view about what has happened
- So that it can be referred to later
- So you are not relying on memory
- So proof of dates, details and actions can be verified
- So managers will believe your point of view

### Question 3

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

- When dealing with an angry customer, raise your voice to gain control.
- When addressing a customer complaint via email, long explanations will help to placate the customer.
- You should research your facts before handling a customer complaint.
- When customer complaints are handled well it can provide organisations with an opportunity for continuous improvement.
- Understanding your organisation's complaints policy and procedures will improve your interaction with customers.

## 2D Deliver a high-quality service to customers

Employees in Australia must tailor their service to cater for all people, regardless of age, ethnicity, physical ability or mental ability.

In such a diverse community, customers may have a variety of special needs, including physical or mental disability or impairment.

Businesses need to adapt their service and communication style to enable these customers to access goods and services. This not only assists the customers but also makes good business sense for any organisation.

Strategies to assist customers with special needs are listed below.

### Visual impairment

- Read brief documents aloud.
- Provide a spoken summary of longer documents.
- Where possible, provide information in an audio format.
- Let the person know when you are walking away.
- Either close doors or open them. Don't leave them half open.

### Hearing impairment

- Try to reduce any background noise. Move to a quiet area. If you have a radio playing, turn it off or down. If you are near other people, ask them to speak quietly.
- Look at the person face to face. Your lips and facial expression can increase the customer's level of understanding. Make sure you have the customer's full attention before you start talking.
- Speak clearly and a little more slowly than you usually would, but don't shout.

### Speech impairment

- Be patient. Allow time for the customer to express themselves.
- Where speech is not possible, provide writing materials for the customer.
- Have brochures or catalogues handy so that the customer can point out the product or service required.

**Mobility difficulties**

- Wheelchair access is improving but it is still very limited in older buildings. It may be necessary to bring the goods out to the customer.
- Where building access is available, organise the office, showroom or reception area so that the customer can manoeuvre the wheelchair without bumping into things.
- Avoid storing products so high on shelves that it is impossible for customers to reach them. If this happens, you can help retrieve objects of interest from these shelves.
- Where customers are on crutches or having general problems with mobility, offer them a chair and then bring the materials to them.

**Mental impairment**

- The needs of a person with a mental impairment can vary enormously. As with all customers, show respect and courtesy.
- Where the person is not clear about the purpose of their visit, use simple language, repeat and rephrase questions where necessary and allow the customer time to respond to you.
- Explain the cost of goods and services and demonstrate with money and change when required.

## Customers from diverse backgrounds

**Cultural diversity is a feature of the workplace just as it is a feature of the Australian population.**

A large percentage of Australia's population was either born overseas or has a parent born overseas, causing Australia to be one of the most culturally diverse countries in the world. Cultural diversity is when the people in a society come from various backgrounds, races or ethnicities. There may be differences in lifestyle, values, beliefs, ideals, race, ethnicity, country of origin, religion, language and communication styles. Therefore, learning about these different cultures and respecting the differences between cultures will improve your ability to get along with workmates and customers.

As a customer service provider you need to deliver the same quality of service to people from a variety of cultural backgrounds. This means really honing your effective communication skills by listening carefully, watching their body language closely, asking questions to clarify their needs, building rapport and speaking clearly and precisely.

Customers for whom English is a second language may have difficulty communicating and understanding you and the services or products you provide.

Here are some strategies for communicating with people whose first language is not English:

- Speak clearly and slowly, using short sentences; repeat key words.
- Don't use jargon or complicated words.
- Watch for body language and signs of understanding.
- Use visual cues such as pointing to products or brochures.
- Don't speak in a loud voice; they are not deaf, they just don't speak English well.
- Don't pretend to understand if you don't understand. Instead, politely ask them to explain again. Find out if other colleagues or staff members are able to interpret.
- Research other cultures and find out how they conduct business. For example, in some cultures it may be rude to look people directly in the eye or it may be impolite to move directly to the point of a business discussion without making small talk first.

## Anti-discrimination legislation

When delivering a service to customers with specific needs, you must ensure you comply with anti-discrimination legislation.

For example, the *Disability Discrimination Act 1992* (Cth) provides protection for everyone in Australia against discrimination based on disability. The legislation encourages everyone to be involved in sharing the overall benefits to the community and the economy resulting from participation by the widest range of people.

Your organisation should have embedded relevant anti-discrimination legislation and other practices into its policies and procedures. If you follow these, then you are meeting your obligations in the workplace and will be equipped to manage the specific needs of customers. Taking responsibility for understanding and applying organisational policies and procedures, as well as legislative requirements, is an important part of your role.

The following is a list of legislations that underpin customer service standards in organisations:

- *Racial Discrimination Act 1975* (Cth):
- *Age Discrimination Act 2004* (Cth)
- *Disability Discrimination Act 1992* (Cth)
- *Sex Discrimination Act 1984* (Cth)
- *Australian Human Rights Commission Act 1986* (Cth)

## Practice Task 8

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

### Case study

Joshua was working at the information desk of a large city store. A woman approached him and asked, 'Where the shoes?' in what seemed to him to be a very rude tone.

Joshua was annoyed by the woman's manner and her lack of 'please'. He treated her very abruptly. He did not know that her English language skills were poor and that she had practised those three words before leaving home.

### Question 1

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Why did Joshua serve the woman in this manner? Tick all that apply.

- He felt she was being rude.
- He did not take the time to consider her cultural background.
- He considered how he was treated and was focused on his own feelings.
- He likes to be abrupt.

### Question 2

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List three reasons why it is important to be able to deliver good customer service to people with special needs.

### Question 3

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Answer True or False to each of the following statements about strategies for delivering good customer service to people with special needs.

Use visual cues for customers with hearing loss. » True    » False

Ask extra questions if the customer has limited English to be clear on what they want. » True    » False

Avoid using jargon or complicated words with customers. » True    » False

In some cultures it is rude to look people directly in the eye when speaking. » True    » False

Brochures and websites can assist people with speech impairments. » True    » False

## 2E Promote products and services

Look for any opportunities to promote your organisation's products and services.

Upselling is one way to promote products and services. Upselling encourages customers to buy extra or perhaps a more expensive product.

An example is when a McDonalds drive-through customer service assistant asks, 'Would you like fries with that?' This can be seen as a negative strategy, or as a way of coercing customers into buying more than they need or want. However, if you have listened carefully to your customers and you understand their taste and purchasing history, upselling can benefit your customers and build your organisation's reputation and sales.

Use each opportunity with a customer to educate them about other products or services may be of interest to them. See the following table.

Customer service opportunities
<p>Seek out opportunities to enhance customer service. Go the extra mile!</p> <p>Often you can simply try to be more flexible; for example, you may be able to extend the time a customer has to pay. You may agree to a customer's request to package items differently from the way the organisation usually packages its products.</p> <p>Internally, you may be flexible in prioritising tasks that colleagues need done, offer to help colleagues when they are struggling with tasks and present or prepare your work in a way that is more suitable for other staff.</p> <p>Use your discretion and common sense to know if and when you can accommodate a customer's request that may deviate from your organisation's regulations or your usual procedures.</p>
Promotional opportunities
<p>In large organisations, a designated department will carry out marketing through complex marketing campaigns. Customers who make contact as a result of these promotions are often attracted by one product or service, then find there are other products and services of interest.</p> <p>Take every opportunity to inform customers of the products and services offered by the organisation. For example, you could:</p> <ul style="list-style-type: none"> <li>▪ offer to send advertising, such as the organisation's brochures, pamphlets or flyers</li> <li>▪ ask if customers would like to add their names to the customer database so they can receive regular information</li> <li>▪ ask if customers would like a demonstration, if this is possible</li> <li>▪ offer to make an appointment for customers to see the organisation's salesperson</li> <li>▪ direct customers to the organisation's website.</li> </ul> <p>In smaller organisations, one person may be responsible for marketing, with input from other staff. You can contribute information gathered from relationships with existing clients about their preferences and needs to assist the marketing strategy. Promoting services available to internal customers is useful to an organisation, especially if the new or extra services result in increased productivity from other staff.</p>

### System opportunities

There are many other things you can do to enhance the quality of service you provide to your customers. For example, use information from customers. Note any instances when customers have complained or where you can see benefits to customers by modifying or changing a particular process.

With the relevant person, regularly review policies and processes to see where they might be improved. Look at the following areas:

- *Recording systems:* Is the current system for recording complaints efficient and effective? How could it be improved?
- *Returns policy:* Is it too rigid? Does it need to be more flexible? Is it clearly written so all customers are aware of the policy?
- *Delivery procedures:* Could delivery be more cost-efficient? How many customers have complained about delivery?
- *Customer service charter:* How long has it been since this was updated? Are there any items that should be added or removed? Are all new staff members aware of the charter and what it means to them? Do staff need to do any training?

## Practice Task 9

### Question 1

Select the best ways to educate your customers on new services and products. Tick all that apply.

- Explain all the items in your catalogue.
- Try to sell more products if the customer looks rich.
- Identify your customer's taste and recommend products that may suit them.
- Provide customer feedback on products to the marketing team.
- Invite customers to join a database to receive notifications of new products, discounts and specials.

## Question 2

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A customer intends to buy a small vacuum cleaner for his cleaning business, but in discussing the customer's cleaning needs, the sales assistant realises the model he has chosen will not have the capacity to do the job required.

In what ways can the sales assistant respond to this situation? Tick all that apply.

- Discuss the options available.
- Discuss features and benefits of products more suitable for the customer's needs.
- Sell the customer the appliance he wants and let him discover he will need a different appliance. This way the sales assistant can make two transactions.
- Find the most cost-effective option that still has the capacity to do the job required.

## Question 3

After listening to the customer's needs, a customer service officer has been considering options for a customer to save them time and money.

When can it be appropriate to promote products and services to customers? Tick all that apply.

- If providing a flexible solution will improve the customer experience.
- If providing the right solution shows the organisation's commitment to excellent customer service.
- If the organisation can make more money out of the customer.
- If providing an alternative product is in the safe interest of the customer.

## Summary

- Customer service must adhere to Australian laws, which should be reflected in organisational policies and procedures.
- If the customer's request can't be fulfilled immediately, a prompt acknowledgment and explanation for the delay is essential to excellent customer service.
- Applying principles of excellent customer service includes:
  - making a good impression by being professionally groomed and having a tidy workstation or service area
  - approaching the customer in a warm and welcoming manner
  - demonstrating confidence and pride in the organisation, its products and its services
  - educating and introducing the customer to relevant products or information on the relevant service
  - thanking the customer for visiting the organisation, whether you have secured a sale or not, regardless of the sale price
  - completing the sale and collecting all required data according to organisational and legal requirements.
- Dealing with customers with special needs requires:
  - sensitivity and understanding
  - adapting customer service practices and developing alternative communication skills.
- Handling customer complaints well can provide an opportunity to improve the organisation. Aim to welcome complaints. Documentation must show that complaints have been recorded, investigated, acted upon and identified for continuous improvement.
- An efficient customer service provider shows initiative and enterprise by identifying opportunities for products and services to be promoted to customers.

## Learning Checkpoint 2

### Deliver customer service

#### Part A

1. Nada, who has a vision impairment, works in your team. How could you ensure you present the information he has requested in the most user-friendly way? Tick all that apply.
  - Ask Nada the best way to show him the information.
  - Arrange time for Nada to read through the information beforehand.
  - Repeat everything twice.
  - Present the information electronically so he can adjust the font of the writing.
2. A heavily pregnant woman comes into an office to pay an account. There is a queue and the wait will probably be about half an hour. What action can be taken to assist the woman? Tick all that apply.
  - Identify the woman's needs and determine priorities for service.
  - Notify her of the wait times and offer alternatives to her having to wait.
  - Treat the woman like all customers in the queue.
  - Notify her of the wait times and offer her a seat.
3. A call centre operator receives a call from a customer with a very strong accent. The operator is having difficulty understanding what is being said. What can she do to resolve this situation without alienating the customer? Tick all that apply.
  - Listen hard for key words.
  - See if there is anyone in the office who can speak their language.
  - Ask them to repeat their request slowly.
  - Speak louder to them.

4. List three pieces of state or federal legislation that organisations must adhere to when delivering customer service.

5. The organisation you work for wants to improve its customer service charter and is seeking your assistance. What could you do to assist this process? Tick all that apply.

- Offer feedback on the most common complaints received about products or services.
- Highlight everything that is wrong and return your feedback.
- Identify any areas of the charter that are not clear to you.
- Research customer service charters from a variety of sources such as the internet, magazines, product packaging or businesses where similar services are provided. Using this research, review and finalise the customer service charter with your changes.

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

## Case study

Read through the letter of complaint, received via your work email.

Dear Manager

RE: COMPLAINT ABOUT FAULTY TELEVISION CABINET PURCHASED AT TVs GALORE on 15 April 2020

I am unhappy with the quality of a television cabinet I bought at 5 High Street on 15 April, 2020 and I am writing to seek a replacement.

The cabinet doors do not open and shut properly and the stain on the cabinet is uneven, with one half darker than the other. The cabinet was delivered on 30 December and I noticed this problem as soon as I unpacked it from the box.

The cabinet is not of acceptable quality and does not match the sample cabinet I was shown in the store.

I would like you to replace it with one of the same quality and finish as the sample and arrange for return of the faulty cabinet at no cost.

I have attached a photocopy of my receipt as proof of purchase.

I would like to have this problem fixed as quickly as possible. If I do not hear from you within 10 days, I will lodge a formal complaint with Consumer Affairs in my state.

You can contact me on 1234 5678 during working hours or after hours on 123 456 789 to discuss this matter further.

Yours sincerely,

Sebastian Porter

6. Write an email responding to the complaint:
- acknowledging the error
  - addressing the key points
  - formatted as a letter with clear paragraphs or dot points
  - using clear and succinct writing
  - checking grammar and spelling mistakes.

Your response to the letter of complaint

7. List two things you could suggest to the organisation to make sure this complaint is not made again.

## Part B

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

### Case study

Sal is an administration officer at a small law firm. There are two legal practitioners, Mariel and Hugh, as well as a legal clerk, Donna. Sal uses an electronic diary in which he asks the three colleagues he supports to list the tasks they need completed most urgently. The firm is relatively new in the area and it wants to gain a reputation for excellent customer service to attract new clients. Their responses are listed below:

- Sal, Mr Archer's keen to get his building started. Can you lodge those conveyancing papers for me today please? Please! Please! It's only a 20-minute walk there and back. (Donna)
- Ring Mrs Fulbright and remind her she's due in the Family Court at 2pm today. (Mariel)
- Has Sonja P. dropped off her signed statutory declaration yet? Can you hurry her up please? I want to finish that matter by next week. (Mariel)
- Any chance the audiotape of my one-hour interview with Pimentos has been typed up yet? (Hugh)
- Confirm my appointment with the Blaxwoods to revise their wills. Friday 3.30pm will be good. I can visit the retirement home if they can't make it in here. (Hugh)
- Just reminding you Sal. It's your turn to put out the recycling bin today. (Donna)
- Courier the documents I put in your in-tray over to Davies & Davies by 11am please. (Hugh)
- I need to leave early tonight. Can you reschedule my 4.30pm appointment to early next week? (Mariel)
- Can you make sure those invoices are ready to go out tomorrow? (Hugh)

1. Keeping in mind that internal and external customer satisfaction greatly relies on prompt responses to requests, how will Sal prioritise and deal with the following requests? Tick all that apply.

- Sal informs the partners he will work through their requests and get back to them when he can.
- Sal develops a schedule for the day and follows up on requests.
- Sal works through the list from top to bottom.
- Sal prioritises the most urgent matters and schedules in the remaining work to be completed.
- Sal is enthusiastic about doing a good job but is stressed out by the pressure, doesn't ask for help and becomes disorganised.

2. In Sal's customer service role, what can he do to ensure he is doing a good job? Draw lines to match the type of customer on the left to the tasks on the right.

- |            |  |
|------------|--|
| » Internal | » Greet the customer when they enter and seek to attend to their needs.                        |
| » Internal | » Maintain the daily schedule and adjust where necessary.                                      |
| » Internal | » Provide the customer with options when a complaint is made.                                  |
| » External | » Prioritise matters that need following up during the day.                                    |
| » External | » Process payments promptly and efficiently once the customer has completed their appointment. |
| » External | » Communicate with team members about urgent matters during the day.                           |

3. A customer is waiting for their appointment and wants to have a conversation. Sal is extremely busy and has other customers to attend to. The customer asks about the other services the firm provides. How can Sal promote the firm's products and services? Tick all that apply.
- Offer to send them advertising, such as the organisation's brochures, pamphlets or flyers.
  - Promise that the firm can solve their problems.
  - Ask if the customer would like to add their name to the customer database so they can receive regular information.
  - Direct the customer to the organisation's website.



## Topic 3 | Evaluate customer service delivery

- 3A Review customer satisfaction by analysing verifiable evidence
- 3B Seek and respond to customer feedback
- 3C Identify opportunities to enhance the quality of customer service
- 3D Document recommendations for customer service improvements
- 3E Submit recommendations for improvements to customer service

## 3A Review customer satisfaction by analysing verifiable evidence

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In order for any business to improve, it must evaluate the satisfaction levels of customers, both internal and external.

Depending on the size of the organisation and the type of business, different methods are used to collect feedback and review customer satisfaction. Organisations analyse feedback collected from a variety of sources, including:

- online surveys such as Survey Monkey
- completed questionnaires
- focus groups
- interviews
- mystery shopping
- reports and complaint registers
- monitoring of returned goods
- monitoring of service calls
- informal discussions
- performance reviews
- tracking of existing or lapsed customers.

The information obtained enables the organisation to continually improve, adjust and modify its products and services to best meet the needs of its customers.

### Start with the end in mind

**Determine what information needs to be collected and why.**

What information is your organisation seeking? Identifying satisfaction with a product? Information on how a product or process could be improved?

Starting with the end goal, the outcome your organisation wants to achieve will inform your selection of which survey tool you should use to collect feedback.

Look at the result by asking:

- What exactly do you want to achieve?
- What areas are you seeking feedback on?
- What techniques will you use to obtain feedback?
- Have these techniques been used before? What were the outcomes?
- What will happen once the information is obtained?
- How will you measure success or improvement?

## How to obtain feedback

There are many different ways of obtaining feedback from customers.

Some are very simple, while others are complex and can take considerable time to complete. Before selecting the method of collecting feedback, you should ask:

- How much time do you want your customers to spend providing feedback?
- Do you want feedback immediately or over a period of time?
- How much detail do you require?
- When is the most convenient time for your customers to provide feedback?
- How often do you want customers to provide feedback?
- What will you do with the feedback collected?

Some methods used to gather feedback are:

- *talking with customers face to face*: as they are about to leave your business or office, ask for feedback
- *calling customers on the phone*: if you have their phone number and permission to call, you can call them after their visit to ask how satisfied they are
- *emailing customers a questionnaire*: mailing a questionnaire provides you with a more formal approach to collecting feedback and allows customers to provide it in their own time. However, it also may be easier for customers to ignore
- *inviting customers to take part in electronic surveys*: guide customers to the organisation's website or to complete a survey at the end of a phone call
- *asking customers for a satisfaction score*: this is common when people leave an organisation they have frequented. This is a fast, simple method of measuring customer satisfaction.

## Surveys and questionnaires on existing products and services

Many organisations use surveys to measure customer satisfaction with the product or service received.

The questions may ask customers to rate their experience on a scale of 1 to 10, tick the word that best describes their experience or circle an emoji. Organisations often use this method when testing new products or services.

## Written customer feedback forms

A written customer feedback form can be inserted into the product package, posted or handed out to customers. A written form allows an organisation to target specific areas they want feedback on and control the amount of feedback collected.

However, written forms take longer for the customer to complete and also rely on the customer being motivated enough to complete it away from the business. Completion rates may be lower than in-store feedback. Another challenge with this type of form is having the form returned.

Online forms may be easier for the customer to complete and return, depending on the age and social demographic of the customer. Some organisations follow up by calling their customers.

Here is an example of a customer feedback form.

Customer feedback	
Thank you for taking the time to do this short survey. Your comments on our service are very important. You can fax it back to us on (05) 5555 5555 or use the postage paid envelope provided.	
Contact name:	
Organisation:	
Address:	
State:	Postcode:
Telephone number:	Fax:
Email:	
How did you hear about our products?	
company newsletter	radio
company mail-out	newspaper
company fax-out	television
journal/magazine	advertisement in other publication (which one?)
staff member (which branch?)	other (please specify)

Was this product easy to order and purchase?
Comment:
Was the product delivered on time and in good condition?
Comment:
Could you suggest any improvements to our sales and distribution process?
Are you happy with the way our products are packaged?
Comment:
Are you happy with our customer service? Yes No
Comment:
Thank you for your feedback!

## Website customer satisfaction forms

In order to save costs in preparing and photocopying hard-copy forms and for ease of administration, customer satisfaction surveys are often uploaded on websites for customers to complete. The analysis of the data is done automatically once the details are completed. Customers are notified by email that this facility is available. Before forwarding an email to a customer, remember to check your organisation's privacy policies and procedures.

A customer satisfaction survey might look like this:

Customer satisfaction survey			
First name:			
Surname:			
Your organisation:			
State:			
Email address:			
Product/service used:			
Where did you purchase the product/service?			
How satisfied were you with the product service?	Very satisfied	Satisfied	Dissatisfied
Would you use the product/service again?	Yes	Maybe	No
How would you rate our customer service?	Excellent	Satisfactory	Poor
Where did you hear about the product/service?			
Comments:			

## Training feedback forms

Training feedback forms or evaluation forms, such as the one below, are usually given out on completion of a training workshop or course. Time to complete the evaluation form is often scheduled into the workshop so the trainer is guaranteed to receive the feedback.

Training feedback forms provide the trainer with an immediate sense of how the course or information was received. It enables participants to comment on how enjoyable or engaging the course was, whether the content presented was new information and/or relevant and what future topics they would like covered, as well as suggestions for improving the delivery and content.

The Training Network 'Managing Change' workshop		
We welcome your comments about our workshop. Your information will help us continue to provide the highest quality service to our clients.		
Name:		
Position:		
Did the presentations provide you with the sort of information you required?	Yes	No
What other information would have assisted you?		
Rank the presentations from 1 to 5 (with 5 being the highest rating).		
What is change?	_____	
Change agents:	_____	
Handling stress:	_____	
Strategies:	_____	
Future directions:	_____	
Did the practical exercises help you understand the change process?	Yes	No
Did the program allow you sufficient time to ask questions and discuss the material?	Yes	No



**Example**

**Customer research survey**

Power Equip research survey				
<p>Power Equip is proud of its record in supplying high-quality gym equipment and exercise wear. Our company recognises the need for monitoring service and satisfaction. Consequently, we invite you to spend a few minutes answering our survey.</p> <p>Your response will be entered in a draw to win a complete home gymnasium, to be drawn on 30 October.</p>				
What Power Equip merchandise are you currently using?				
When did you last purchase a Power Equip product or service?				
What motivates you to purchase a Power Equip product or service?				
How much do you generally spend at Power Equip? Circle or highlight the relevant price range:				
Less than \$50	\$50-\$99	\$100-\$149	\$150-\$199	\$200+
How important are the following points? Rate them from 1 to 9 (with 1 being the highest importance).				
Store opening hours:	_____	Competitive prices:	_____	
Store layout:	_____	Range of products:	_____	
Delivery/pick-up options	_____	Store location:	_____	
Loyalty program	_____	Quality of service:	_____	
		Quality of products:	_____	
Would you be likely to use a mail-order service?	Yes	No		

## Feedback results

The results of customer feedback are only valuable if they lead to improvement.

Targeted customer research can provide organisations with a clear view of:

- how their products or service rate/s with customers
- the types of products or services wanted
- how their brand compares with other brands
- how loyal customers are to this product or business
- which areas or departments need improvement
- why customers feel dissatisfied
- ways to improve the products, services or processes.

The results from customer feedback should lead to a number of ongoing improvements, including those listed below.

<b>Innovation/ improvement</b>	<p>Feedback may indicate a need for the organisation to update and modify the systems and processes used to provide quality customer service. In some organisations, promotion of customer service is evident; however, the quality systems and processes may fail to support the charter.</p> <p>Identifying ways to implement the customer service charter easily is the aim of every organisation.</p>
<b>Problem-solving</b>	<p>Feedback may highlight problems with products or services. This provides an opportunity for work or design teams to look at these problems and identify potential solutions.</p> <p>Problem-solving is a highly sought-after skill in organisations. With practice, you can develop your ability to solve problems and deal effectively with customer inquiries and complaints. Observe the strategies used by experienced colleagues and learn how to use feedback to contribute to problem-solving in an organisation.</p>
<b>Responsiveness</b>	<p>How organisations respond to customer feedback will demonstrate to customers whether:</p> <ul style="list-style-type: none"> <li>▪ their opinions are taken seriously</li> <li>▪ they are valued by the organisation</li> <li>▪ the organisation is willing to listen and change</li> <li>▪ the organisation is seeking innovation</li> <li>▪ the organisation is committed to developing its staff and creating a good workplace.</li> </ul>

## Practice Task 10

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

### Case study

A small publishing company develops and sells booklets that contain current reviews and ratings of local establishments such as restaurants, second-hand clothing, bookstores, antique stores and small galleries in each capital city in Australia.

At a staff meeting, a sales representative says that he has received 'lots of inquiries' regarding the possibility of purchasing these booklets online. It would be very expensive for a small business to set up this service.

### Question 1

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Describe at least four other factors the company should consider before making a decision about an online service.

### Question 2

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At the moment, the booklets are sold through large bookstores that take a 40 per cent commission for each sale. These bookstores are not going to agree to distribute any survey materials that might result in lost sales.

Identify, from the options below, what a questionnaire could identify for the organisation.

Tick all that apply.

- customer satisfaction with the paper-based ordering facility
- customer interest in using an online purchasing facility
- what customers are willing to pay for the new service
- the demographics of the customer

### Question 3

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How could the company deal with complaints that may come from its other customers – the bookstores – who might consider that the company is being disloyal to them?

Tick all that apply.

- By explaining to bookstores that the change is in response to feedback from end-users/customers
- By providing bookstores with advance notice of when the change will take place so they can prepare
- By ignoring the complaints from the bookstores as their distribution will soon be redundant
- By promoting the date of online versions of books via posters, website updates, email notices, and so on, to allow customers time to adjust.

## 3B Seek and respond to customer feedback

Relationships with customers are two way, and the way you respond to feedback greatly affects their view of the business.

If an organisation has invited a customer to invest time and effort in responding to surveys, reviewing products and leaving comments, then a response is warranted. In seeking customer input, organisations have established a two-way relationship.

Responding to feedback can be time consuming, especially for small- to medium-sized enterprises (SMEs). With the development of social media, organisations can now find themselves flooded with reviews and comments and responding to these customers has created full-time positions in larger companies. Knowing how to respond to feedback, both negative and positive, requires skill and prompt action.

Here are some strategies for responding to feedback.

### Thank customers

Always recognise and thank customers for taking the time to comment, write a review or complete a survey. Even if their comments are negative, by thanking them you are saying that you appreciate them taking time and effort to respond and that the organisation values honest feedback.

### Share positive feedback

Many organisations are focused on containing negative feedback and fail to promote or share positive feedback. Sharing positive feedback is a great way to motivate staff and include them in the success of the organisation. It creates better teamwork and can improve job satisfaction.

For external customers it can also build brand following and promote a positive image of the organisation and/or products.

### Acknowledge staff

Some organisations rely on obtaining feedback from frontline operators who have day-to-day contact with customers. On a daily basis, these people encounter feedback from customers regarding all aspects of the organisation's products and services.

By sharing good, positive comments made about a colleague, you can build confidence in colleagues while also acknowledging their skills and contribution.

If the comments about a colleague are negative, it can provide an opportunity to see if the comments were warranted and if professional development is needed.

### Respond to negative feedback

Although complaints can be difficult to read and social media can create a platform for customers to be more direct than they would be face to face, it is still important to acknowledge and deal with these complaints or comments.

If your organisation has made an error in service, admit the error and apologise. Empathise if customers have had a negative experience with a service, then move to rectify it.

When responding on social media platforms, remember that your response will be seen by many, so it needs to be professional and courteous.

### Remove emotions

If you find yourself feeling angry towards a customer's negative comments, it is important not to let your emotional response dominate your reply.

Keep calm and respond only to the facts. Keep your response short and direct and always re-read, or ask a colleague to check, your reply to ensure the message doesn't seem rude and can't be taken the wrong way.

### Solve problems

When customers have complained or highlighted a problem, the best reply is that you have heard them, taken this issue up in the organisation and are working to solve the problem. Thank the customer for bringing this to your attention. It may be appropriate to let them know when the issue has been resolved.

### Share innovations

Customers like to see that their suggestions have been implemented. This can make some customers feel like they have made a real contribution to the organisation.

Replying to customers by explaining how their suggestion has been acted on can build a stronger connection with customers.

Internal customers can become de-motivated if they have been asked for feedback to improve a work process and nothing has changed. They will be less likely to participate in surveys in the future. So sharing information on how management has addressed a workplace issue is important for staff morale.

## Notifying customers of your actions

If you want customers to believe that you are listening to them and that you value their feedback, inform them of your findings and the changes made as a result of their feedback.

For example, a local gym conducted a survey about the facilities offered. As a result of the feedback, all the fitness rooms were painted and had new fans installed, and the swimming pool was cleaned more often. These improvements were displayed on a television screen above the reception desk so when customers entered the gym, they could see the results of their feedback and the improvements made.

Keeping customers informed of developments and improvements can be achieved via posters, memos on bulletin boards, notices in magazines or newspapers, television advertisements, email notices, texts and social media platforms.

Supermarket chain Woolworths purchased prime-time television advertisements explaining how the supermarket was reducing plastic bag use in response to customers' concern for the environment.

Staff in organisations want to see customer satisfaction scores go up, and when they do, the results should be shared and celebrated. When scores remain flat or go down and when goals and targets are not achieved, the results should still be shared so everyone can take action.

If delivered sensitively, all feedback is positive, providing an opportunity to improve or to learn from mistakes.

## Practice Task 11

### Question 1

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What methods do organisations use to collect customer feedback? Tick all that apply.

- surveys
- focus groups
- customer complaints
- gossip
- apps

## Question 2

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List four strategies for responding professionally to negative feedback.

## Question 3

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When a customer provides feedback, how can an organisation communicate that improvements have been made? Tick all that apply.

- If the customer has left their contact details, thank them for their response. If a change has been made to rectify the problem, this should be included.
- Send a long email to the customer outlining all the changes that were implemented.
- Notify the customer that training of staff has taken place and changes were made to policies and procedures.
- Organise posters, screens, television advertisements and radio messages telling people of the changes made.

## 3C Identify opportunities to enhance the quality of customer service

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Organisations are always looking for new ways to measure and improve their customer service.

Smaller organisations may have little time and means to create and conduct customer surveys and focus groups. Instead, they rely on more informal feedback, such as across-the-counter feedback, complaints verbalised or sent in spontaneously by customers, or customers discussing their problem with the receptionist or a salesperson.

Some less obvious ways include:

- observing customer interactions
- monitoring increases or decreases in sales
- monitoring retention of staff
- monitoring repeat business
- monitoring new customers
- meeting deadlines
- monitoring productivity rates
- checking competitors' products and services
- monitoring the quality of work being produced.

### Monitoring incoming calls

Monitoring incoming calls provides insights into customer service.

You can determine where product or service problems are occurring by monitoring incoming calls. A sudden increase in calls may indicate a boost in sales or a problem with a service.

Analysing the reasons for calls, the time of day calls are made and the types of queries enables organisations to improve customer service by:

- providing extra information on their website
- releasing media releases to explain queries about products
- rostering extra staff to be on the desk at busy times
- correcting a logistical error identified by an influx of complaints.

The following form records the focus of calls and the number of calls received during each time slot using a tick (✓).

Customer calls record						
Area	9–10am	10–11am	11am–12pm	12–1pm	1–2pm	2–3pm
New product	✓✓✓✓✓✓	✓✓✓✓✓	✓✓✓	✓✓✓	✓✓✓✓✓✓✓	✓✓✓
Current products	✓✓	✓✓	✓✓✓	✓✓✓	✓	
Advisory service	✓	✓✓		✓✓✓	✓✓✓	
Promotions	✓✓			✓		✓

## Supplying additional information

Client forms provide specific information.

The client form below identifies additional information that may reduce the need for follow-up research and enables any problems to become immediately obvious.

Company	Details	Status	Comments
Design Oz	13a Palm Crt, St Kilda VIC 3182	Regular client	12/2/16 Really likes our new markers.
Driver Training	27 Cranbourne Ave, Ringwood VIC 3134	Regular client	15/2/16 Can't get our electronic diary to operate.
EduWares	59 Elizabeth St, Fitzroy VIC 3065	Regular client	18/2/16 Complained that they are always put on hold as soon as their call is answered.
Electronic Warehouse	10 Mandalay St, Castlemaine VIC 3450	Regular client	24/3/16 Did not receive order.
Elton Electrics	403 Victoria Pde, Pascoe Vale VIC 3044	Lapsed since Aug 2012	24/3/16 Rang to ask if we had any special promotions at present.
Finance Plus	200 Hertog Rd, Sale VIC 3850	Regular client	1/4/16 Wants a sales rep to come out to show the Board the new electronic whiteboard.

## Monitoring returned goods

Monitoring returned goods provides an opportunity for recall of any faulty products and product improvement.

Volvo car company recalled more than 120,000 cars from the USA in 2019 and 2020 after car mechanics recorded a high number of brake repairs.

This is just one example of why it's important to keep a record of returned goods. Information such as this can alert an organisation to any problems with particular products and can help staff find ways to solve the problems.

The records should indicate:

- what goods were returned
- why the goods were returned
- the rate at which goods were returned.

## Tracking existing and lapsed customers

Tracking past and present customers provides insights for an organisation.

Many organisations use a management system to keep track of their customers. Customer information may be kept on a database or in hard copy form.

By collecting client information and tracking customers' purchases, organisations are able to:

- target their products and services more accurately to the right demographic and/or geographical area
- recommend complementary products or services that might suit them
- identify the seasons when their shoppers purchase their products
- estimate prices people are willing to pay
- identify the quality of products; for example, how long a hair colour lasts before requiring a touch-up
- engage with clients to discuss why they have left the service
- entice customers to return to the business by offering discounts and other bonuses.

The client data collected is useful for determining information such as:

- the types of purchases (services or products) made
- the volume purchased
- the amount spent
- the types of organisations or customers who purchased
- where customers are located
- the frequency of purchases
- the date of the last purchase.

## Example

### Monitoring delivery of customer service

Leah works for an outdoor furniture company. She sorts through the most recent customer complaint forms and types the results into the organisation's customer database. The complaint forms identify the nature of the complaint and any actions taken.

One customer had complained about the service they received after purchasing a barbecue. The purchaser was told delivery would take three days. After a week had passed and the barbecue had not been delivered, the customer phoned customer service to be told it would be delivered immediately; it was delivered the next day.

Leah summarised the complaint in the 'Delivery' category as 'Product not delivered on time'.

Management looked at the summaries at the end of the week. In this case, they examined the delivery procedures and found there had been a communication breakdown. The truck had broken down on the day the delivery should have taken place, but the customer had not been notified of the consequent delay.

## Practice Task 12

### Question 1

What are the benefits to an organisation of recording informal customer feedback? Tick the correct answer.

- By recording informal customer feedback, staff ensure that customers' views are promptly passed on to the relevant people and are not filed away and forgotten.
- By recording customer feedback, staff have a list of customers who may have been difficult to work with in the past.

### Question 2

List four ways a company can monitor its customer service without formally surveying customers.

### Question 3

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An electrical store notices an increase in calls every day at about 5pm. The calls are from customers complaining that their air-conditioners are cutting out. On further analysis, the electrical store notices that the customers are all calling from one particular regional area three hours north of Melbourne. There have been no calls from customers in other areas.

a) What could the problem be?

b) List three things the electrical store could do to improve its customer service.

## 3D Document recommendations for customer service improvements

All employees should be involved in making recommendations for improving customer service.

Identifying the problems and collecting feedback is only one step in the process of continual improvement for an organisation. The next step is to collate the feedback into like areas. Ideally, information should be categorised into complaints, compliments and comments. The next step is to discuss the issues identified, see if they are valid, prioritise the urgent ones and then draw up a list of recommendations to address the issues.

Recommendations are often documented so they can be presented to the manager or board for approval or disapproval.

A sample of complaints and recommendations for improvements is provided below.

### Help customers

**Complaint:** Customers were not sure of what to expect at the centre and felt unprepared for the experience.

**Recommendation:** Provide more information via brochures, on website, via email and so on before customers arrive at the centre. Include what clothing to wear, how long the experience will go for and some pictures.

### Understand customers

**Complaint:** That products were too expensive

**Recommendations:**

- Survey customers to identify age group and social demographic, as well as likely occupations to understand why pricing may be an issue.
- Review wholesale pricing to see if better deals can be found for raw products.

### Correct customer service faults

**Complaint:** 25 per cent of customers had to wait in line for more than 20 minutes before being attended to and 20 per cent of callers hung up.

**Recommendations:**

- Monitor incoming calls to see what times are busiest, and what the average time is that staff spend on calls.
- Adjust the staff roster to cope with peak times.
- Direct customers to the website to seek information before they call.

### Understand the organisation's products and services

**Complaint:** Staff don't know about products and have to send through phone inquiries to supervisors.

**Recommendation:** Give staff training on new products each week.

### Retain customers who might otherwise go elsewhere

**Comments:** Customers are looking for a new range of products, colours and so on

**Recommendations:**

- Offer loyal customers a loyalty discount.
- Invite them to special releases of new clothing ranges.

### Move closer to achieving goals of increasing sales, improving customer service and product quality

**Problem:** Staff do not get any feedback on customer service, sales or figures

**Recommendations:**

- Hold brief staff meetings monthly to give financial updates.
- Send out monthly emails on the internal QA system with details of the month's sales and areas of improvement.

### Create a more positive customer service culture where all staff establish professional, ongoing relationships with their customers and work together to achieve optimum customer satisfaction.

**Complaint:** Staff are bored in their positions and don't know what the rest of the departments are doing.

**Recommendation:** Implement staff rotation to work in different departments and build a better sense of the whole business.

## Practice Task 13

### Question 1

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Some people believe it's not worth complaining or providing suggestions for better service because nothing will be changed. Sequence the following feedback in order of most likely (1) to least likely (3) to be acted on.

- 'I like your bread rolls but the flour you dust them in gets all over my clothes. Can you do something about the flour?'
- 'Last Wednesday I purchased a Waterford crystal vase from your store but while crossing your car park in the rain, I slipped and almost dropped the vase. Can you put a cover over the car park for the comfort and safety of your customers?'
- 'The security officer at your front door is very abrupt. Surely an electronic security device would be more appropriate?'

### Question 2

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Select whether the following statements are True or False.

- a) Recommendations inform customer feedback.                      >> True                      >> False
- b) Recommendations inform continual improvement.                      >> True                      >> False
- c) Recommendations need to be approved by management.                      >> True                      >> False
- d) Recommendations need to be actioned.                      >> True                      >> False

## 3E Submit recommendations for improvements to customer service

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Written reports provide a succinct analysis of data collected and recommendations.

You may be required to prepare a written report outlining the results of the customer feedback you have received.

The report should be written in plain English and be clear, concise and easy to understand.

Use headings, spacing and diagrams to make it easy for the reader to follow. Format the report using graphics, tables, charts or other features that enable the data you have collected to be easily understood, especially if you are managing a large amount of data. Some reports may be substantial, covering a number of aspects of service delivery, while others may focus on a single aspect.

Apply your literacy skills to edit and proofread your work to ensure your information is accurate and the report is free from spelling and grammatical errors.

When the report has been completed it should be presented to the appropriate person with a copy of the blank survey, questionnaire or complaint form you used to collect the information or feedback, so the reader can see how you obtained it. Recommendations should be presented as a bulleted list, with brief but clear descriptions.

The report should include:

- a title that reflects what the report is about
- a cover page, a list of contents and an executive summary (depending on the audience and purpose of the report)
- an introduction explaining how the feedback was received and analysed
- the results or findings of the feedback analysis
- recommendations on how procedures can be best improved.

## Practice Task 14

This brief report was compiled using the information received from an evaluation form that customers completed after they had attended a workshop titled 'Managing Change'.

Read the report, then answer the questions that follow.

### The Training Network

#### Evaluation of workshop

##### Introduction

In October, the Training Network conducted a workshop on managing change. The one-day workshop was held at the Globe Hotel in Perth and attended by 150 people. Participants came from a range of corporate businesses. The majority of people were supervisors, managers and executive officers.

At the end of the workshop, participants were asked to complete an evaluation form. Of the 150 forms distributed, 93 forms were completed. The questions asked participants to comment on the standard of presentation, whether the workshop met their needs and what sessions they would like in the future.

##### Results

- The workshop was very successful, with most of the comments being positive.
- The majority of participants enjoyed the sessions. The most popular one was 'Handling stress'.
- More than 75 per cent of participants reported that they would have liked more 'hands-on' activities. The 'Change agents' session was reported to be 'boring' and a 'waste of time'.
- 20 per cent of participants complained about difficulties with parking.
- 25 per cent of participants said they would have liked more handouts.
- 35 per cent of participants said they would have liked better publicity about the seminar – many only found out about it at the last minute or didn't realise what it was actually about.

##### Recommendations

Management might look at:

- improving the distribution of promotional brochures
- increasing the number of handouts
- reviewing the choice of speakers
- looking at other venues with better parking facilities.

## Question 1

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Was the information that the organisation received valid? Justify your response.

## Question 2

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How should the organisation use the information collected? Tick all that apply.

- By using the feedback to determine how they could improve the training workshops in the future, or leaving unchanged the things that worked well
- By directing responses to the appropriate staff
- By identifying staff who are not working effectively so they can be sacked from the organisation
- By informing design of future courses
- By using it to shape changes to policies and procedures

## Question 3

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You work in customer service for a local supermarket. You have been asked to write a report for your manager.

Read through the situation and data provided below, then write a report for the supermarket manager. Include:

- an introduction
- the results (include the data as a bar graph)
- at least three recommendations.

Check your work for any grammar and spelling errors, and make sure it is clear and easy to read.

### Situation

March 2020. Due to the COVID-19 virus that has swept through the local community, supermarkets are selling out of toilet paper and essential items such as pasta and flour. Customers are complaining to the check-out workers that there are not enough products for everyone.

### Data collected

Products selling out by 10am are:

- hygiene items, e.g. toilet paper, tissues – 100%
- pasta, rice and flour – 80%
- canned vegetables – 50%
- alcohol – 50%
- fresh fruit and vegetables – 20%

**Report for management**

**Introduction**

**Results:**

**Recommendation/s:**

## Summary

- Customer satisfaction with an organisation directly influences the organisation's ability to develop and prosper. Simply reacting to crises or responding to customer complaints is inadequate. Regular monitoring strategies need to be implemented to evaluate how well an organisation or an individual is performing.
- There are many ways to capture customer feedback: direct observation, questionnaires, face to face, by phone, social media, mystery shopping, focus groups, measuring sales and so on.
- Databases are used to store and monitor customer service; for example, by analysing the:
  - number of complaints recorded and from whom
  - quantity of returned goods
  - sales increases and decreases
  - retention of staff
  - lapsed customers over a designated period of time.
- Positive and negative feedback needs to be responded to and provides opportunities for improvement.
- Feedback is only helpful if it is discussed, analysed and leads to continual improvement.
- Continually improving customer service gives an organisation a competitive edge.
- Results of feedback and improvements made must be conveyed to customers.
- Research and analysis can be presented in structured reports so that decision-makers in the organisation can plan and fund improvements.

## Learning Checkpoint 3

### Evaluate customer service delivery

#### Part A

Imagine that you have been a customer at Delish Cafe and Cafe Espresso for over 12 months. You alternate between the two cafes for your morning coffee.

Delish Cafe sends you text messages notifying you of changes to its menu and any promotional events that are coming up. It has polite, bubbly staff who inquire about your day and promote a selection of baked goods to complement your morning coffee. The cafe loves to get feedback on its products and service.

Cafe Espresso has amazing coffee and some of its staff seem quite friendly, although they talk more among themselves than with the customers. You have made a comment in the past about the coffee not being hot enough at times, but you never heard anything back.

1. Draw a line to match the cafe on the left to the correct statement on the right.

» Cafe Espresso                      » This cafe encourages customer feedback.

» Delish Cafe                        » This cafe lacks rapport with customers.

» Delish Cafe                        » This cafe is more customer focused.

2. Keeping customers satisfied is a major priority for most organisations. Often, it only takes one mistake for a customer to take their business elsewhere. Based on the information provided above, which cafe prioritises customer satisfaction?

- Delish Cafe
- Cafe Espresso
- Customer service is a priority for both cafes.

3. Methods used to monitor and report on customer service differ depending on the size of the organisation and the manner in which it does business.

Select the methods most likely used for monitoring and reporting on customer service in a very small cafe. Tick all that apply.

- Ask customers directly for feedback.
- Monitor regular and repeat customers.
- Monitor returned goods.
- Track customers on social media.
- Surveys, reports and complaint forms

## Part B

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

### Case study

A toy library that is run by a local council surveys its borrowers to find out whether it should carry toys associated with violence; for example, guns, swords, knives, police batons, handcuffs, lassos, bows and arrows, and computer games.

In the interest of simplicity, borrowers are asked to answer the question by ticking either the YES or the NO column in the survey, which is placed next to the checkout desk. It is left there for two weeks. Normal borrowing time is four weeks.

Thirty of a possible 142 borrowers respond.

The result is that 62 per cent of the respondents are in favour of the toys, and 28 per cent against.

1. Select whether the following statements are True or False.
- a) Fewer than 25 per cent of customers completed the survey.      >> True      >> False
  - b) The survey posed questions that focused on specific toys.      >> True      >> False
  - c) The survey was valid.      >> True      >> False
  - d) The survey was not valid.      >> True      >> False

2. Alternative ways for the toy library to obtain feedback could include (tick all that apply):
- talking to customers face to face
  - phoning customers to ask specific questions
  - itemising the types of toys on the questionnaire
  - removing toys and waiting for feedback.
3. Select True or False to describe the following facts on customer service and verifiable evidence.
- a) Feedback enables an organisation to adjust and modify its products and services to best meet the needs of its customers.      >> True      >> False
  - b) Staff can become disengaged if they can't see the benefits of their feedback.      >> True      >> False
  - c) Customer service involves forcing customers to provide feedback.      >> True      >> False
  - d) If delivered sensitively, all feedback is positive, providing an opportunity to improve or to learn from mistakes.      >> True      >> False
4. A large organisation has invested in a comprehensive survey, obtaining valuable data and suggestions from each customer. You have been asked to submit a written report of the findings.
- What information would you include in your report? Tick all that apply.
- An outline of the way the feedback was collected
  - A summary of the key findings of the feedback
  - Details about every comment from customers
  - Your own comments

