

BSBCUS301

Deliver and monitor a service to customers

Release 1

Learner guide

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Aspire Version 1.1

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BSBCUS301 Deliver and monitor a service to customers Release 1

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Before you begin

This learner guide is based on the unit of competency *BSBCUS301 Deliver and monitor a service to customers*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

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

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



Foundation skills

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

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

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> Comprehends textual information to determine customer service requirements Proofreads texts for clarity of meaning and accuracy of grammar and punctuation
Writing	<ul style="list-style-type: none"> Completes responses to customer complaints in required format Prepares reports using sequencing, format and words to communicate recommendations clearly and effectively
Oral communication	<ul style="list-style-type: none"> Provides information or advice using structure and language to suit the audience Asks questions and listens to gain information or confirm understanding
Navigate the world of work	<ul style="list-style-type: none"> Recognises, understands and applies organisational policies and procedures relevant to role
Interact with others	<ul style="list-style-type: none"> Selects and uses appropriate communication conventions to establish connections, build rapport, seek information and develop professional working relationships Adjusts personal communication style in response to the opinions, values and particular needs of others
Get the work done	<ul style="list-style-type: none"> Plans and implements systems to gather and organise information Monitor actions and progress against goals and implements adjustments as appropriate Uses problem-solving skills to analyse and respond to customer complaints or enquiries Identifies and follows up on opportunities to improve work practices and outcomes

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 Provide prompt service to customers	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Establish 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 high-quality service to all customers, including those with specific needs	<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

continued ...

... continued

Topic	Key outcome	Rate your confidence in each section
Topic 3 Monitor and report on customer satisfaction	3A Review customer satisfaction through the analysis of verifiable evidence	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Identify opportunities to enhance the quality of services and products	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Monitor delivery of customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Use customer feedback to improve the provision of products and services	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3E Report on and recommend improvements to customer service	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic 1

Identify customer needs

Customers expect fast, friendly and quality service. In today's competitive market, successful organisations are those that understand their customers, produce goods and services to match customer needs, and deliver excellent customer service. As a provider of services, you have the opportunity to satisfy, dissatisfy or impress. In a competitive marketplace, it makes sense to provide superior customer service. Superior customer service that exceeds your customers' expectations will make your business stand out from your competitors.

The key to identifying customer needs lies in building a relationship with your customers. This means getting to know as much as possible about why they do business with you, understanding what their requirements are and doing your best to meet their expectations. Provide accurate, reliable and current information that enables customers to make informed choices. Be familiar with the range of products and services your organisation offers, including price, special offers, availability and delivery. Know who, or where, to refer customers when appropriate, following organisational policies and procedures.

In this topic you will learn how to:

- 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

Customer service is a primary concern to almost every organisation, large or small, in public service or private enterprise. Every day billions of service transactions take place across the world. Competition between companies and industries is fierce. For individuals or organisations to succeed, they need to develop an edge – something that separates them from others in the marketplace.



Customers will not tolerate poor service. Customers are willing to shop around until they find excellent service provided by people with professional, courteous attitudes. In an open market, customers have wide choice and will exercise it.



There is nothing new about providing first-rate customer service. It is an attitude that puts the customer first and finds new ways to continually serve that customer. Customer service means recognising who is here for whom – we are here for the customer and without the customer, we have no reason to be here.

Exceptional customer service cannot occur without good people. This is why you, as a service provider, are so important. People count on you for help. You make the difference.

Customer service charters

Part of your job role is to be aware of standards, legislation, organisational policies and procedures and customer service documentation, such as customer service charters, market research or articles on industry trends. You need well-developed literacy skills to read, interpret and apply this information. Much of the material may contain industry terms you are unfamiliar with, so always seek advice if you are unsure of anything.

In order to raise awareness of customer service in the workplace, many organisations have developed customer service charters.

Customer service charters provide information and direction to staff and customers describing the standard of service and delivery in an organisation.

They 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.

Even in the non-commercial world, such as governmental departments, customer service charters exist 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, organisational goals and how they 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.

Internal customers

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, reporting 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. Internal customer support strongly affects the quality of the service delivered to external customers.



'Hi Frances. When can I expect to receive the financial report from you?'

'I aim to finish the report by 5.00 pm today. Will this be a suitable time frame?'

'Yes. Thank you for your commitment to finishing the report on time.'

Example: government agency customer service charter

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 their 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.

(Source: www.ors.sa.gov.au)

Quality assurance and customer service

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 Organisation for Standardisation (ISO) is a worldwide federation of national standards bodies. The 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.

Understand legislation

When delivering a service to customers, you need to be aware of your role and responsibilities, including your personal limitations. Your responsibilities include complying with federal, state or territory legislation and guidelines relating to your workplace.

Your organisation should have embedded relevant legislation and other practices into their 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 your 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. Being able to work independently and manage your own learning is a valuable skill.

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>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.

You can read more about these legislated requirements by visiting www.comlaw.gov.au.

Get to know your customers

Internal customers are people you provide services to within your company, whereas external customers buy your company's products and services. Regardless of whether the person is internal or external to the organisation, it is important to recognise that the key to success is how we service the customer.

Customers may be from other organisations, businesses or government departments. They may be corporate clients, individual members of the public, consultants, contractors or suppliers. Most organisations keep an up-to-date record of their existing customers on a paper-based or electronic customer database, which is then accessed when the customer contacts the organisation.

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, e.g. 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, e.g. satisfaction, complaints
- whether the customer has any special arrangements, e.g. discounts
- personal details such as birthdays or special interests.

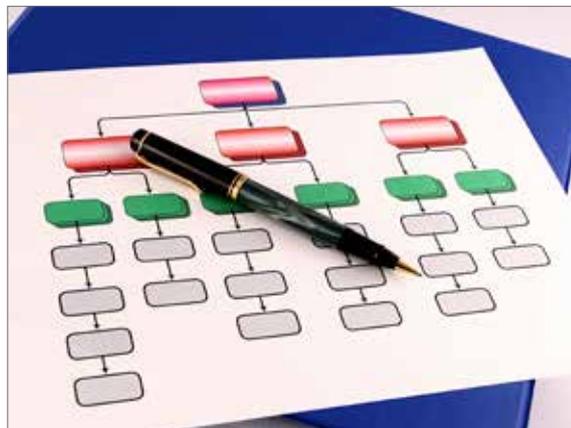
Organisational plan or chart

Gathering accurate data on internal customers is also vital for the smooth running of an organisation. 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.

An organisational plan or chart shows the function of each department or branch, where each person works, their title and their responsibilities. These people depend on services somewhere else in your 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.

It is important to note that we all provide services regardless of our employment status; for example, a person who is not in full or part-time employment will most likely provide services to friends or family, or in a volunteer capacity.



What do customers really want?

Your success as a service provider depends on how well you handle your customers. Understanding your customers' needs, wants and motivations is essential for providing exceptional customer service.

Let's explore why a customer would be motivated to contact an organisation.



External customers may seek information relating to:

- the organisation and what it does
- office opening hours
- products and/or services offered (general or specific)
- prices
- delivery details
- payment options
- obtaining a refund
- returning products
- making a complaint
- speaking to someone responsible for a product
- arranging an appointment.



Internal customers may seek information relating to:

- 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
- specific information; for example, the cost of an item
- research information; for example, details on catering firms or government policy
- a report your department has prepared
- information regarding a particular customer.

Customer contact

You may find that someone outside the organisation needs to be contacted before information can be supplied to an internal customer; for example, your supervisor may have asked you for travel information, which means that you may need to contact a travel agent.

The following diagram shows the various actions you can take when a customer contacts you.



Basic customer needs

According to Mary Gober, author of the *Art of Giving Quality Service*, all types of customers have a number of basic needs.

Basic customer needs

1

The need to feel important

Think about a time when you have stood around waiting to be served by a salesperson or you have waited on a telephone for an extended period of time. Did you feel important? Customers like to feel important and essential. Providing prompt, reliable service gives the message that each person is number one.

2**The need for belonging**

Belonging to a club, team, department, association or group can have a positive effect on the wellbeing and mental and physical health of people. Recognising this need, many businesses promote products and services to ensure that customers stay with their company; for example, discounts may be offered if the customer stays linked with a particular hotel chain. These people are called regular customers. To satisfy the need to belong, always aim to know the name of your customers; talk to them, let them know that you remember them, take time to communicate and provide exceptional service.

3**The need to feel appreciated**

Customers like to feel that their time, dollars and energy are valued and appreciated, especially when they are a regular customer. If you provide excellent service, the customer usually gives appreciation in return.

Think about how you feel when you are appreciated and valued by other people. Customers like to feel appreciated, particularly when they invest time, energy or dollars into a product or service. Feeling appreciated is particularly important for regular customers. Showing appreciation with a verbal word of thanks, thank you notes and other signs to show your gratitude is important in maintaining positive relationships.

4**The need for control**

Customers do not like unpleasant surprises or to be taken advantage of, manipulated or deceived. This is particularly important when a customer is making a major purchasing decision such as a trip, a major household item or a luxury service.

5**The need for understanding**

We all want to know what is happening around us and the reasons why it is happening. It is very important that you provide accurate and honest information to a customer regarding products and services, particularly when something has gone wrong; for example, an item is not available or delivery has been delayed.

6

The need for honesty

So many customers have had the experience of false advertising, broken promises and poor service. Customers have a strong need to feel that they can trust you as a service giver and the organisation that you belong to. Always deliver what you promise.

7

The need for friendliness

Think about a time when you have dealt with an unfriendly person providing a service. When we experience this type of person, it affects our opinion of the business. Customers like to deal with people who are warm, have a smile and are friendly; this creates a sense of trust and confidence.

Use effective communication skills

In order to meet a customer's needs, it is important to find out what a customer really wants. There are two ways of achieving this: using effective communication skills and conducting market research.



Listen effectively

The most important communication skill to develop is listening. On average, you will spend most of your day listening to what other people are saying.

Unfortunately, many of us do not have well-developed listening skills. Part of the reason is because we hear at a rate of 500 words per minute and we speak at around 125 words a minute. It is hard to keep our mind focused on what is being said when this gap is so great.

Listening carefully is hard work. Because people think faster than they speak, it is easy to rush in with a response before the other person has stopped speaking.

Listening carefully

When you actively listen to customers you:

- show that they are important and worthwhile
- are interested in who they are
- help to reduce emotions and anger
- develop trust and confidence in the relationship

Not listening carefully

If you do not listen carefully there is a risk that you will misunderstand what the person is saying, which could result in providing the wrong information.

When people don't listen carefully they can:

- 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

Listening to a customer is probably the most important aspect of dealing with queries over the telephone 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.

Take notes

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. These can be used for later reference. Taking notes also shows the customer that you are listening to what is being said.

Get rid of distraction

Do whatever it takes to eliminate distractions when listening to others. It's always hard to listen well if there are other distractions, such as a noisy machine or loud music.

Take time to listen

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? 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. You can also ask the customer to repeat essential details such as document details or invoice numbers. On the telephone, repeating words and phrases such as 'yes', 'uh huh', 'I agree' or 'of course' has a similar effect. These expressions are often referred to as 'verbal nods'.

Listen fully

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, a person with a doctor's appointment has been waiting a long time. He asks 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.

Listen to what is NOT being said

When a person is upset they will leave out vital parts of information. If you are dealing with an upset customer, always ask questions to access the information that may be missing.

Do not make judgements or get defensive

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. The best form of defence is to listen without any reaction. This will help to get the conversation back on track.

Listen in silence

Keeping quiet while the other person speaks is a good sign that you are listening. However, this does not mean that you are silent for long periods. Good listening skills are shown by not interrupting and responding after the person has finished talking.

Body language

Did you know that 55 per cent of our communication is 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, you can often pick up whether they are happy or unhappy.

Body language is:

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

Ask questions

Ask questions to clarify information and identify customers' needs. Customers may have difficulty explaining what they want to know, or be difficult to understand. 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.

If you use open questions, you must listen carefully to what is being said. You should make notes when appropriate, ask further questions to clarify points and confirm to the speaker that you are interested in what is being said. Examples are questions and comments such as 'How many times a day do you have to do that?' and 'That must be a very interesting part of your work'.

Closed questions

Closed questions are questions that can be answered with 'yes' or 'no' or in a very few words. They are used to open 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 10.30 am or 2.30 pm 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. These questions 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?
- What functions do you want your copier/printer to have?
- What kind of food would you like served at the reception?
- Could you tell me a little more about the products you are using at the moment?

Be courteous and respectful

Sometimes the only distinguishing feature between two organisations is the courteous behaviour of their employees. Courtesy can be simply saying a few words such as 'Thank you' or 'Come and see us again'.

Courtesy is having a great attitude, saying nice things and treating the customer with respect.

Courtesy is caring for your customers and having an understanding of their needs and wants.



'May I help you?'

'Yes, could you please assist me in choosing the right health insurance policy?'

'I would be happy to do that for you.'

Summarise the discussion

When a person is talking, it is important to summarise what is being said. This means repeating what has been said in just a sentence or two. This technique reassures the customer that they have been listened to.

You can even tell them 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?'

Using this technique shows the customer that you have been listening and have heard everything that has been said. It also reduces misunderstanding.

The customer will tell you when you have not understood what was said.



Speak effectively

The second part of effective communication is being able to speak effectively to customers. You must know what to say, how to say it and what to do if there is a problem.

Consider your customers

When building a relationship with customers, be aware of their age, gender, religion, culture and experience. You also need to know your organisation's products and services. Use language that is suitable, based on what you see and hear.

Talk with people in ways that are best for them; for example, a customer may not have a good command of the English language. When talking with this customer, it is important to listen carefully and not speak too quickly.

Be careful of using 'jargon' or expressions that relate to a specific product or service. Simplify the language so that the customer understands. A customer may be confused when technical terms are used.

Watch how you speak

Sometimes we are unaware of how we speak. Your speech is made up of several different aspects. Check that you have good voice quality, tone, speed, volume, pronunciation and accent when talking with customers.

Ask for feedback

Remember that most people do not listen well. Therefore it is important that all of the barriers are removed to ensure that the conversation is effective.

When you talk with a customer, watch for a reaction. If the customer is giving signals that they are confused or you are having a hard time understanding them, change the way you are speaking. Check with the customer and ask questions or make a statement to show you can see that the communication is not effective.

For example:

- Is this making sense?
- Are these terms that you understand?
- If I am going too fast, please ask me to slow down.
- 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?

When preparing a written reply to a customer, rephrase their request; for example, if they have asked you to send them a brochure about your products, you could begin your letter by writing, 'In response to your request for a description of our products and a list of our prices.'

Example: speak effectively to your customers

Josie has just bought a used car that is in need of a service. The mechanic examines the car and starts to tell her that there are many things wrong with it. He uses many technical terms that are confusing. She leaves the car with the mechanic but feels upset and concerned that the service is going to cost a lot of money. She does not understand what is going to be done or why.



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Write effectively

The third communication skill that many of us need to develop is to write effectively.

There are general rules for written communication such as emails, faxes and letters. It is important to write clearly, professionally and according to your organisation's guidelines. A good rule to follow is to write as you talk. Imagine that your customer is right there with you. Talk with them in a straightforward, friendly and clear manner.

The trick in writing information is to ensure that the message is clearly understood. Pay attention to *what* you say and *how* you say it. Negative messages can be picked up through the written word.

When writing a message, consider the following:

- The purpose – What are you trying to accomplish? Who are you trying to inform? Think about why the message is being sent.
- The reader – Who will read this message? How will they receive your message? Will they understand the basis of the message?
- The scope – Use the following questions to determine what is to be covered in the message: why, when, how, how much, what, where and who?
- What you want to write – Think before you start to write. Prepare a short outline. This will save you time and effort in preparing the message.
- Writing as you speak – Be specific and limit the number of words. Use short sentences with easily understood words and write in the active voice.
- Checking what's written – Always check what you have written before you send it. Look for typographical errors, missing words and poor grammar.

Use technology effectively

As part of your communication skills, you need to be able to use technology effectively to impart information effectively and efficiently. Be aware of your organisation's computer systems and software so you can select and use technology appropriate to the task; for example, emails with attachments or an electronic presentation.

Conduct market research

The second way to find out what a customer really wants is by conducting market research.

When a company is conducting market research, it should look at conducting both primary and secondary research. Here are some aspects of conducting market research that you should know.

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 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.

Primary research

Primary research is conducted by the organisation itself.

Strategies used to gather primary research provide valuable information about customer expectations.

Strategies for gathering primary research include:

- focus groups, to identify a need for more safety features on a product, different colours, sizes, and other variations
- customer surveys, to identify difficulties and offer ideas to enhance customer service; for example, forms that accompany each product or 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 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 company newsletters, magazines and trade journals, television and radio programs and notes from consultants or professional development speakers.

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.

Example: ask questions to identify customer needs

Michael works for a company that organises seminars and conferences for businesses. A customer, Sondra, telephones wanting a quote from the organisation of a two-day seminar for her firm, bringing together 20 of their 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 technician support
- catering
- services offered by the organisation, 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.

He asks questions to ensure that the image he has of this seminar is similar to the one Sondra has in her mind.

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 for all involved.

Practice task 1

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

Case study

Susie has been working as a teller for two years in a major bank. She never smiles or talks to the customers. If she is asked questions, she answers abruptly and rudely. Her supervisor is constantly telling her to improve her attitude.

1. What do you think her supervisor should say to her?

2. Which customer needs are not being met in this situation?

continued ...

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Practice task 1

Case study

Joseph has just been promoted. As a celebration, he decides to take his family to dinner at a local restaurant. On arrival at the restaurant, the family are told they will have to wait for a table. No waiting time is given. Forty minutes pass and the family are still waiting for a table. Other people who come in later are seated and their orders are taken. After one hour of waiting, the family leaves the restaurant vowing they will never go there again.

3. If you worked in this restaurant, how would you handle this situation?

4. Which customer needs are not being met in this situation?

1B

Determine the urgency of a request

In today's world people often expect their needs to be met immediately.

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 the door. In the business world, customers look for the supplier who can provide a quality product or service quickly.

You may receive requests by telephone, in written form or face to face from a variety of customers.

Customers may include:

- corporate customers
- internal customers
- individual members of an organisation
- the general public
- government agencies.

Respond 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.

Determine the urgency of the request and prioritise accordingly. 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. However, there are times when delays may occur. This can be particularly frustrating for the customer so it is important that effective communication skills are used to explain the delay. Provide the customer with all the reasons why the delay or situation has occurred to ensure understanding.

Demonstrate a level of understanding and care by proposing solutions to alleviate the customer's stress. If you give careful explanations, your customer will have an opportunity to decide on an alternative path to take or they may agree to your proposed course of action. If the customer will not accept your alternate course of action, contact your manager.

Reasons for delays

- Information may need to be obtained from someone else before it can be passed on to the customer.
- Another person may need to confirm availability before an appointment can be verified.
- Products a customer wants may not have arrived from the supplier.
- A replacement may have to be authorised by a more senior person.

Keep the customer happy

Your highest priority is to keep your customers happy. Your customers want to know what you can do for them. They 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.

If you become aware that a customer's requests are delayed, contact that customer immediately. Explain that there may be a delay and ask questions to determine the best course of action.

Sometimes the customer may need the information, product or service immediately, while on other occasions the customer will be content to wait.



'Do you need an answer to this request within 24 hours or could I get it to you by the end of the week?'

'I can wait until the end of the week provided you remember to call me back.'

'I have made myself a high priority reminder to answer this request by the end of the week.'

Deliver what you promise

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

The person taking the request needs to identify any factor that might interfere with the company meeting its promise; for example, the customer lives in a remote part of Australia where delivery services are infrequent, or the customer pays by personal cheque that could take up to a week to clear.

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.



Practice task 2

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

Case study

A customer purchases a printer and computer from a small communications company. A condition of the purchase is the provision of two training sessions within one week of the delivery of the goods. After 10 days, the specialist still hasn't been in touch with the customer to arrange a time for the training. The customer calls to complain.

The receptionist receives the call, obtains details from the customer (including the date of purchase and the product 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.

1. What options are open to the receptionist now?

continued ...

... continued

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

3. How will this impact on the company if the situation cannot be resolved?

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

1C

Match customer needs with appropriate products or services

Did you know that customers will judge an entire organisation based on a single service experience? Therefore it is very important that every customer has a positive experience.

When customers talk about the service they have received, they do not talk about people, they talk about the total organisation. One bad experience can stop a person from doing business with the organisation forever.

You make the difference! You are the organisation! How you act, look and talk projects an image for the organisation.



Understand your organisation

It is essential that you use effective communication skills and are knowledgeable about your organisation's products, services, prices, policies and procedures, particularly in handling customer complaints, refunds, discounts and return of products.

Information about the organisation and its purpose can be found in annual reports, business plans, company 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 as a whole.

What you need to know about products and services

The majority of customer requests are about the products and services an organisation provides.

In order to provide accurate and relevant information, you need an excellent understanding of the products or services the organisation offers, especially as the customer will not always be familiar with everything available.

Some organisations sell an extensive range of products; for example, a sports store may stock clothes, shoes, training videos and equipment for a range of sports. It may also offer services such as equipment hire, coaching, training and therapy for sporting injuries.

Other organisations sell a specialised range of products such as surfing clothes and equipment, or golf equipment.

The hospitality industry is a good example of a service provider. Services offered can range from accommodation and travel to food and beverages, hire-cars and arranging tickets to shows.

It can also be useful to have some knowledge of similar products and services offered by competitors.



Promotional material

To help customers understand what they offer, most organisations produce a range of advertising material to promote their products and services.

Advertising material may include brochures, flyers, catalogues, order forms, policy documents, paper-based or electronic price lists, presentation packs and websites.

As a service provider you need to know what material is available, in what form it is presented and where it is located. This will enable you to provide information to customers from a variety of sources.

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 the promotional material you refer to is always up to date.

You should also know the appropriate method of forwarding the information. This may depend on your organisation's policies and procedures or the urgency of the request. It may involve a courier service, personal delivery or email. Whatever the situation, all information should be sent out as quickly as possible. This will present a positive image of the organisation.

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).

Maintain confidentiality

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 that you find out the policies and procedures relating to the release of company information.

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 in regard to confidentiality, as defined within your employment contract.
- Ask your trainer, manager or a friend in the workplace to advise you about what is and isn't confidential.
- Find out why the information is confidential and what to do if a customer's queries relate to this information.

Understand products and services

It is important that you keep up to date with product development, so you can identify trends as they occur and be 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.

To be able to provide customers with sufficient, appropriate product or service information that will help them make a choice, you need to be able to explain a variety of things about the product.

You should be able to explain the following:

- Features and benefits
- Costs
- Discounts
- Special offers
- Availability
- Payment options
- Return policies
- Product options
- Packaging and delivery options

Product features and benefits

Features are the characteristics that define 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.

Benefits are the advantages the product or service will give the customer.

Depending on the product or service, benefits include:

- saving the customer time
- saving the customer money
- providing security or reassurance
- being convenient
- being adaptable.

If a customer visits the organisation, show the product or use the catalogue to explain the benefits and features. Keep comments brief and describe the most important elements.

Your employer may provide you with a chart or catalogue that clearly displays the features and benefits of their products or services. If not, find out where advertising material is kept or write your own list.



Costs

One of the most frequently asked questions by customers is the cost of a product or service. Internal customers may also ask you about the cost of travel or accommodation, or about the cost of stationery and postage; for example, you may be asked to price a bulk mail-out for distribution of products.

An organisation might offer a range of products or services at different prices depending on their quality, size or purpose. Be familiar with your company's pricing structure as well as pricing policies and procedures.

Generally, the customer will ask questions to identify exactly what they require because this will affect the price they pay. For example, if a customer wants to enrol for a seminar they must be told whether there is an 'early bird' option if they pay before a certain date, or whether there is a discount for groups of 10 or more.

Customers may ask:

- the price of a single item
- the price for a bulk purchase
- discounts for special offers
- how the payment is calculated; for example, hourly rates or a set fee
- additional costs for handling
- costs involved in returning an order
- how the price has been calculated; for example, type of model purchased, discount offered or GST applied.
- payment terms; for example, credit terms or automatic billing.

Available discounts

Be aware of any discounts available to customers. These may be the deciding factor of a customer's choice.

An organisation may provide discounts:

- from time to time; for example, 10 per cent off all stock during July
- on specific items; for example, 20 per cent off brake testing
- for people who book early or take advantage of an offer for groups.

Special offers

Some special offers are known as 'add-ons' or 'value-added features' and may be offered as an ongoing arrangement. This does not necessarily mean an extra cost to the customer, although sometimes they might be made available for a discounted price if the customer purchases something else.

These types of offers might include:

- a help-desk service on computer sales
- free demonstrations
- materials to get you started.

An organisation may offer a special deal to promote a product or service.

Special offers might include the following:

- Buy three, get one free
- Receive a gift with every purchase
- Join now and get a month's free membership
- One month's free trial
- Free installation

Product availability

You should know the availability of products and services as it will limit the frustration for your customers.

Some products may be in stock but others may have a waiting time of days or even months; for example, some products or parts of products may have to be ordered from overseas.

Sometimes a single item may be available, but bulk orders will take longer. A product may only be available in certain areas or at certain branches.

Be sure to know the exact details or know where to find them quickly so the customer can be given the right information.

The provision of a service may rely on the availability of someone to deliver it; for example, customers may want to make an appointment or organise a quote on services offered. Perhaps all the available people are already working on jobs and will not be free for a week. A service or course may have been booked out and another one may not be available until the next semester.

Know whether the organisation offers services outside business hours and how these services are delivered. This is an important question that customers often ask.

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.



Payment options

You may receive queries that relate to when payment is due or will be made, the method of payment, or which forms of payment are acceptable (for example, cheque, credit card or cash).

Payment and handling methods vary from one organisation to another. Generally, customers can pay by credit card, cheque, money order or cash. Payment may be required on delivery or from a direct debit of their account.

Payment might be carried out in two ways, as below.

Direct payment

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 telephone using a credit card; or with a cheque or money order sent through the mail.

Having an account

Customers may have an account with the company and pay by cash, credit card, cheque or direct deposit when the bill is received.

Different ways customers can pay

Payment options available to customers vary according to the organisation and the type of product. Perhaps term payment is an option, which means that the customer pays a nominated amount within a specified period.

Existing customers will be familiar with the payment options and may already have an account with the organisation. However, be familiar with their payment history if possible. Take note if this is on the customer database; for example, it may not be appropriate to advise a customer whose last cheque bounced that they can pay by cheque.

More organisations are allowing customers to use the internet to pay their account by either credit card or direct debit from their bank account. This is very convenient but there are issues regarding security and confidentiality.

If your organisation accepts payment via the internet, assure customers that the organisation has its own or a third-party secure server; the information provided will be used only to process the order; a receipt will immediately be emailed to the customer to confirm payment; or a password may be needed to log in to the site.

Return policies

Most organisations have policies and procedures for handling replacements or refunds and giving credit. Know what these are. Being able to tell a customer they are eligible for a replacement or refund is good customer service.

There may be a variety of reasons for giving refunds; it will be dependent on the organisation's policy and procedures.

Generally, refund conditions are clearly explained to the customer prior to purchasing or booking, or they are printed on the registration form.

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 obtain a refund. Certain conditions can apply if a customer wants to return goods.

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 offer to send a courier to collect the goods, send a replacement immediately or perhaps do both, plus offer an additional 10 per cent discount on future purchases.

Customers might receive a refund for goods that are:

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

Product options

As a service provider, you have a responsibility to provide options to customers. When speaking with customers, try to provide a range of options or suggestions regarding their needs.

Question the customer regarding their specific needs. You will often find that the customer will tell you exactly what they require.

If there are options available that will assist in the purchase of a product or service, let the customer know. Don't provide options based on price alone, but offer what is most suitable for the client. This builds good customer relations.

Perhaps your organisation has packaged its products at a range of different prices. A customer may decide to buy a particular product or service but is not sure which package is the best. You would describe the various pricing structures, compare the packages and suggest the best option for the customer based on their needs.

Product options may include:

- providing a range of goods to suit various needs, differentiated by price, colour, size, quality or model
- packaging products in different ways to suit customers' needs; for example, single items or packs of 10
- providing a range of quality options, from standard to deluxe.

Packaging and delivery options

When a customer relies on an organisation to deliver the goods or the service, they need to know exactly when and how the delivery will take place and how much it will cost. An organisation's delivery methods for products may include post, air, courier, electronic or personal delivery.

When explaining delivery options, mention whether the organisation has a special arrangement for urgent deliveries. This might involve a courier and special costs. Explain how urgent orders are processed.

Delivery of a service may require customers to be in attendance; for example, they may need to be at home if curtains are to be fitted, cupboards are to be installed or the plumbing is to be looked at.

If the delivery involves a series of training courses or demonstrations, the customer needs to know the exact time, location and duration.

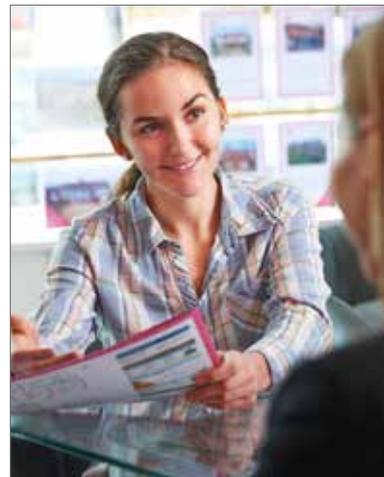
When you provide information to internal customers, be aware of how they would like it to be delivered; for example, are they happy for you to email the information or would they prefer an email, a telephone call or a visit? They may prefer the information to be placed in their pigeonhole or their in-tray.

Competitors' products and prices

It is worthwhile to have some knowledge of similar products or services offered by competitors. This allows the benefits of your organisation's products to be highlighted to customers; for example, if your organisation can customise its product to suit each individual customer and its competitor cannot, you should tell customers about this advantage.

Sometimes the advantage may be that the product is cheaper or lasts longer.

If a customer asks for a service that your organisation does not offer, refer them to an organisation that does offer the service. This shows the customer that your organisation is helpful and willing to please. It's 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.



Monitor 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.

Ask yourself:

- How well do you know the range of products and services?
- Are you familiar with all of the organisation's promotional material and their purposes?
- How well do you understand the organisation's customers?
- Do you feel confident when dealing with customers?
- Do you have any suggestions for your team that might improve customer service?

Example: know your organisation's products and services

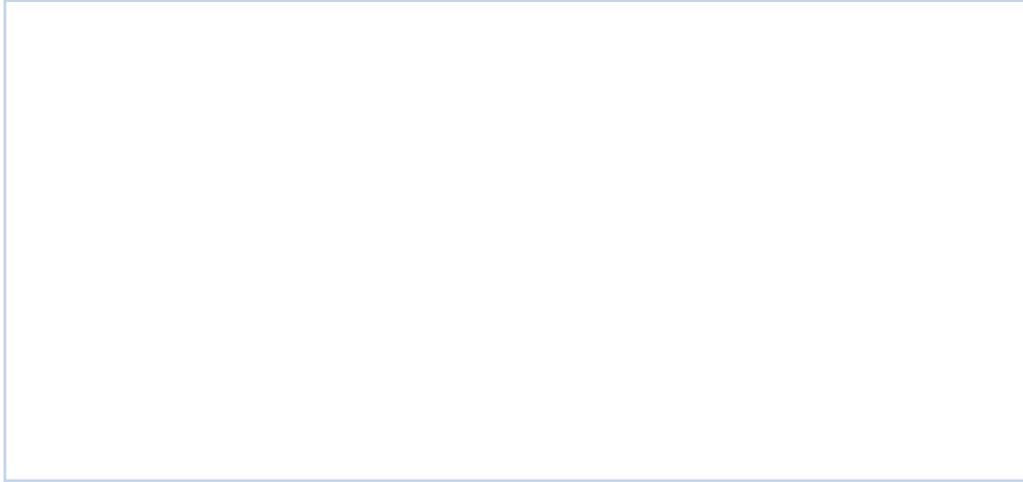
Saskia works for a local council. A customer calls wanting to know about hall-hiring fees. Saskia explains the standard fees that apply for the basic hall hire and then questions the customer to find out exactly what kind of function it is going to be. She explains that the council offers a range of 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
- 10 per cent discount on the hall-hire cost if the customer hires it again.

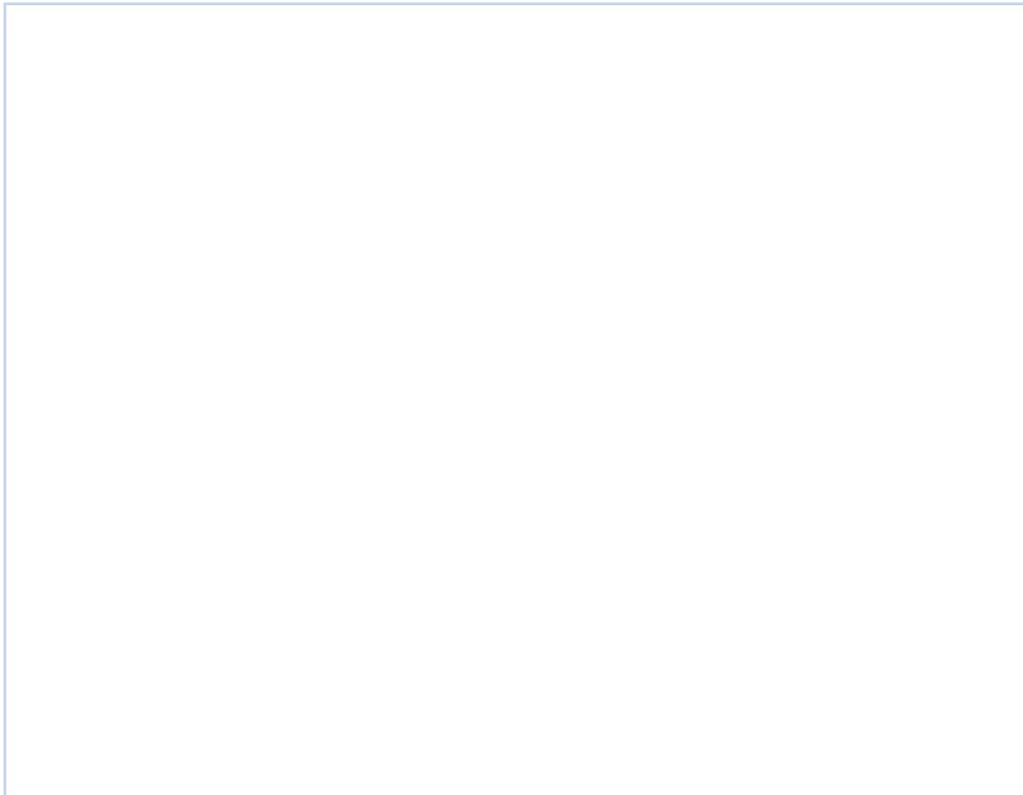


Practice task 3

1. Imagine you are starting work in a school or college office. What products and services will you need to know about to enable you to identify and match customer needs?



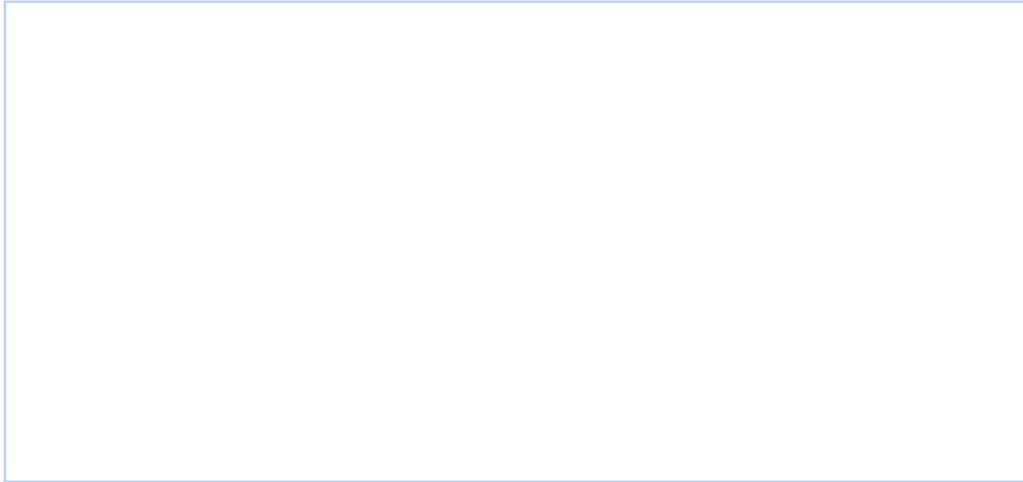
2. Think of work you are doing or have done either in a voluntary situation or in paid employment. What does the organisation offer? Were you well trained in understanding those products or services when you first started? Are you provided with ongoing training as the organisation puts new products or services on the market?



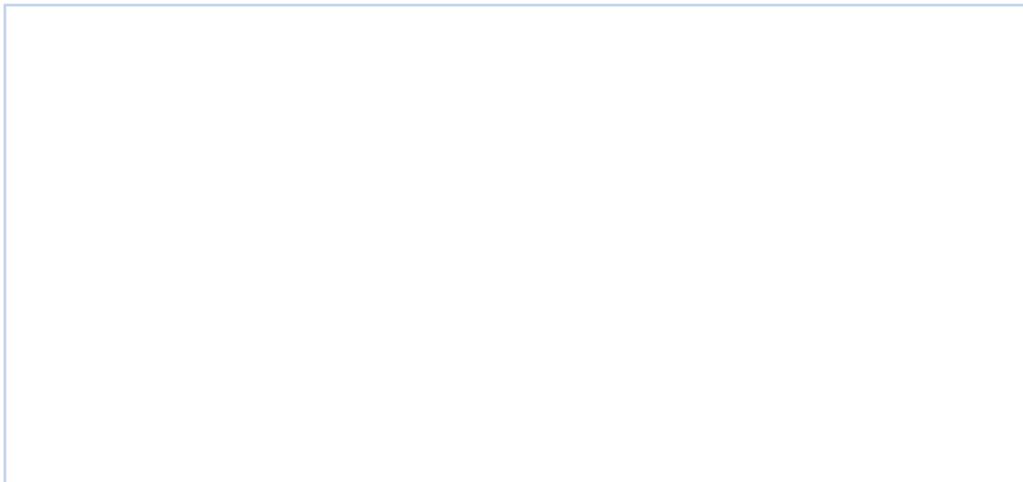
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3. Have you ever been inconvenienced by a customer service officer giving you incorrect or misleading information? What happened? How was the problem resolved? Did you do business with that organisation again?



4. Research, then list, a range of learning options that may help you improve your customer service skills.



1D

Seek assistance to meet customer needs

There will be occasions when you cannot give the 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. Whatever action is taken, be sure to inform the customer when to expect a response.

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.

Record the actions taken

Be sure to record the actions taken. If an appointment with another staff member needs to be made for the customer, follow your organisation's procedures.

When dealing with phone inquiries, remember to keep handy a staff directory or a list of products and services and the people who are responsible for them. Put the customer briefly on hold while the query is explained to the other staff member. This means customers will not have to repeat themselves.

Sometimes you may be unable to satisfy a customer because the product is not currently available. Politely explain that it is out of stock and tell them when it will be available, or suggest an alternative.

If your organisation does not sell the product asked for, tell the customer where they are likely to find it. Being helpful encourages the customer to return to your organisation.



Record customer service details

Most organisations like to keep some record of when and why customers contact them. Recording contact information assists organisations to market products and services, reveals why customers make contact with the organisation and provides information that the organisation can analyse to improve its customer service.

Record the details of customer requests, the questions they ask and the action taken. A record of contacts with customers helps identify what was done for them; for example, were they sent a brochure or were they promised a price list?

Every organisation has a different way of recording contacts with their 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
- do not 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 client 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 9.30 am	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

Follow-up action

Go the extra mile, and follow up with customers.

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

If promotional information has been sent to a customer, it is good customer service to contact them within a selected time frame (for example, two weeks) to inquire whether they received the material.

This is good public relations and also 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.



Practice task 4

1. Describe a time when you were limited in addressing a customer's need at your current workplace or an organisation you are familiar with.

continued ...

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Practice task 4

2. Who could you seek appropriate assistance from to help you address specific customer needs?

Summary

1. Quality customer service is the key to success for any organisation. Customers expect fast, friendly and quality service.
2. Your success as a service provider depends on how well you handle your customers. Understanding your customers' needs and wants is essential to quality service.
3. Providing good-quality service depends on the following effective communication skills:
 - being able to listen well
 - speaking and asking questions
 - writing or reading information.
4. There are specific customer service tools that organisations use to provide good service. These include customer service charters, quality management systems and standards.
5. Customers are often not sure what they want. As a customer service provider, you must have a sound knowledge of all the products and services on offer so you can provide the customer with appropriate options.
6. Relevant questioning and, where possible, checking with an informed third party can identify whether a request is urgent.
7. Recording all customer contact provides a permanent record of what took place and the action to be taken.

Learning checkpoint 1 Identify customer needs

This learning checkpoint allows you to review your skills and knowledge in identifying customer needs.

Part A

1. List information about one of your organisation's products or services in the table below. If you are not currently in the workforce, choose an organisation you are familiar with. Answer the questions that follow.

Product/Service	
Features	
Benefits	
Options offered	
Cost	
Discounts offered	
Special offers	
Payment options	
Delivery options	
Procedures for providing replacements, refunds and credit	
Promotional material	

- a) Explain why knowing this information is essential if you are to deliver excellent customer service.

- b) Describe how you would assist a customer who isn't really sure that this product or service is what they want.

- c) Explain what you would do if the product was temporarily unavailable.

- d) 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.

- e) Identify a trend that is happening with the product or service. Explain how this affects the information you provide customers.

2. Create a list of at least five questions for each customer in the situations outlined below that will help the customers communicate their needs and expectations.

- a) A visually impaired man wanting to register as a guest at a motel.

- b) A recent migrant with little English wanting to purchase particular medicines at a pharmacy.

- c) A customer in a hardware store who is trying to find a water-saving device but cannot remember the name of it.

d) An engaged couple wanting to select wedding invitations.

e) A workplace supervisor who asks you to prepare a report on the advantages and disadvantages of introducing 'casual dress Friday' in the organisation.

f) A customer who has contracted you to develop a resumé for her.

3. Use information you collect in your workplace, or one you can research, to answer the questions that follow.
- a) Explain the policies and procedures in place relating to privacy, discrimination, and work health and safety (WHS).

- b) Explain why it is important that you comply with legislative requirements when recommending products and services.

- c) Why is it important for an employee to take control of their work life and actively seek ways to gather further skills and improve their performance?

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

Part B

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

Case study

Leisha and Rami work for T-shirts ABC! Their job is to take orders from customers and relay them to the printers, who print the required lettering and/or images onto plain 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.

One Monday morning Leisha takes a call from a customer asking if T-shirts ABC! 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 printers' order book and sees that they have some downtime on Wednesday. She tells the customer that it will be possible and that she should bring a copy of what she wants imprinted on the T-shirts into the office that afternoon.

In the early afternoon 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 has taken the call and has not left instructions so he will need to clarify the customer's needs once again.

Rami quickly establishes that the customer wants to use T-shirts in the school colours and trim, not the plain T-shirts that T-shirts ABC! normally uses. The customer has already purchased the T-shirts somewhere else and has brought them with her. She wants the photo scanned with lettering underneath that say Undermool High School – Class of 1972. On the back she wants a list of the 25 names printed.

Rami then has some difficult issues to address.

Company policy is not to use T-shirts supplied by customers as the company has no control over the quality of the garments and the printing may not be as successful on inferior material.

The photo is much too faded to scan clearly, especially on non-standard colours.

The job is much more complex than the straightforward scanning Leisha imagined and therefore might not be finished on time.

1. Suggest ways in which Rami can:
 - a) explain the misinformation to the customer

- b) deal with the customer's likely reaction

- c) offer some sort of compromise to help the customer with a solution for her urgent task

- d) improve the way customer needs and expectations are clarified so no misunderstandings arise in the future.

2. Who are Leisha's internal customers? Has she met their needs adequately?

3. What could Leisha have said to let the customer know the limitations that needed to be placed on her order?

4. Use a word processing or spreadsheet package to create an order form to be used in this office to ensure that all orders comply with company policy.

Case study

Chen is an administration officer in a legal firm. Some very important clients are visiting in two weeks and 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 formatted, how it should be formatted or when it is required.

5. Develop a list of questions that Chen needs to ask his supervisor to clarify her needs and expectations.

6. Develop a list of questions Chen would need to ask the various catering firms.

7. Select three restaurants/cafés in your region and create a comparative table of their menu, costs, and suitability for business luncheons such as the one Chen is organising.

Restaurant	Type of food	Cost per head	Suitability

Topic 2

Deliver customer service

Customer service is an organisation's ability to supply its customers' wants and needs. Customer service is more than just keeping customers happy. In a competitive marketplace, it makes sense to aim to provide superior service. Customers base their purchasing decisions on the service they receive, not just price, quality and availability.

For an organisation to excel in customer service, it must constantly and consistently exceed the customers' expectations. To exceed customer expectations, an organisation must recognise that every aspect of a business has an impact on customer service.

Finding new customers is much more expensive than retaining existing ones. An unhappy customer can damage your business and reputation.

Good customer service means being courteous and helpful when dealing with all customers, attending to their needs promptly and handling any complaints sensitively and politely according to the organisation's procedures.

In this topic you will learn how to:

- 2A Provide prompt service to customers
- 2B Establish rapport with customers
- 2C Handle customer complaints
- 2D Deliver high-quality service to all customers, including those with specific needs
- 2E Promote products and services

2A

Provide prompt service to customers

If your organisation has a customer service charter, you will be aware of the benchmarks for quality customer service. You may have your performance evaluated against those criteria.

A vital step in satisfying the customer comes from correctly identifying their needs and matching them with the products and services available. Once the request has been made and the details noted, you must follow through by fulfilling your 'end of the bargain' promptly.

Whatever action is required, it needs to be taken quickly and with the customer's knowledge. This ensures that customers feel their request is important and their business is valued.

Be sure that you keep speaking with the customer about what you are doing and why. In the interim, make small talk about the weather, holidays or something that will hold their interest. All of these factors assure the customer that their needs are being looked after promptly.

If information needs to be accessed from another source, promptly:

- put the customer on hold while the required information is found
- refer the customer to someone in the organisation who can help, or refer them to the organisation's website
- ask the customer for their contact details so that the information can be emailed, faxed or posted to them.

Overcome weaknesses in customer service

Have you ever been on the receiving end of poor customer service?

Have you ever approached a counter or front desk where the staff member continued a lengthy conversation with a colleague before attending to you?

Have you made a request or order that was neither acknowledged by the organisation nor fulfilled?

Have you ever specified your request must be met within a certain time frame, yet that deadline has been ignored?

Some simple strategies can overcome these weaknesses in customer service. The same strategies apply to requests from internal customers, such as colleagues requesting to have a report read by a certain time or the minutes of a meeting emailed to them urgently.

Acknowledge the request, indicate whether you can meet that request immediately or at a later time, and let them know what action is being taken to fulfil their needs.

Simple strategies to overcome weaknesses in customer service

If it is necessary to finish a conversation, apologise to a waiting customer and assure them they will be attended to in a moment.

If you receive requests, record any responses that need to be made in a diary or electronic calendar, along with accurate client contact details.

When a response will take some time, send an email assuring the customer that the organisation received the request and that it will be fulfilled as soon as possible.

Respond immediately to anyone who is working to a deadline, especially if it cannot be met by the organisation.

Practice task 5

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

Case study

Svetlana is the personal assistant to the managing director of a financial advisory firm. The director asks her to send a Financial Management Strategies brochure to a client. Svetlana promises to send it immediately, taking down all the client's details. She puts the brochure in an addressed envelope, then into the mail basket for collection.

A week later, the director asks her whether the brochure was sent. She replies that she thinks she sent it but she's not sure now, because she sends lots of brochures to clients.

1. What could Svetlana do to improve the situation immediately and in the long term?

2. What impression does Svetlana's director now have of her organisational skills?

2B

Establish rapport with customers

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

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

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 wave length, 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.



Build rapport

Rapport is the key to influence. It starts with the acceptance of another person's point of view and their style of communication. In order to influence, you have to be able to appreciate and understand the other person's point of view.

Rapport can be established on the telephone, using email, through documents and from face-to-face contact. Rapport happens at many levels.

You can build rapport at all times through:

- being yourself
- the way you dress, behave and sound
- the values you live by
- your beliefs
- the people you spend time with
- the places you go.

Tips for building rapport

Here are some tips for building rapport with your customers.

Tips for building rapport

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.

Embrace the customer's body language, gestures, voice tone and speed.

Respect the customer's time, personality and interests.

First impressions count

How you look, 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.

Positive voice

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.

Customer permission

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.

Professional dress

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.

Confidence

Demonstrate confidence and pride in your organisation's products and services.

Good communication

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.

Genuine interest

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 about 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.

Product knowledge

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.

Enthusiasm

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.

Guidance

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.

Complete the sale efficiently

Rapport building continues through to the final transaction of a purchase. Whatever transaction occurs, you must be well trained in the relevant procedures so that the customer is not confused or left waiting for lengthy periods.

When goods are to be taken from the establishment by the customer, you should package them in a way that shows you care for the product, ensuring the goods can be transported securely.

When services are purchased, a contract may need to be completed, service dates settled on and customer contact details documented.

Building rapport with customers requires commitment and effort. Being sensitive to their changes in attitude and comfort level from the first interaction makes it much easier to know how to deal with them in the future.

Tips for building rapport with customers

- Ask questions to steer the conversation.
- Show empathy to customers.
- Offer a number of options to customers.

Practice task 6

1. Think about a time when you established rapport with two people: work colleagues or acquaintances. What did you notice about these relationships?

2. How did you know that you had established rapport?

2C

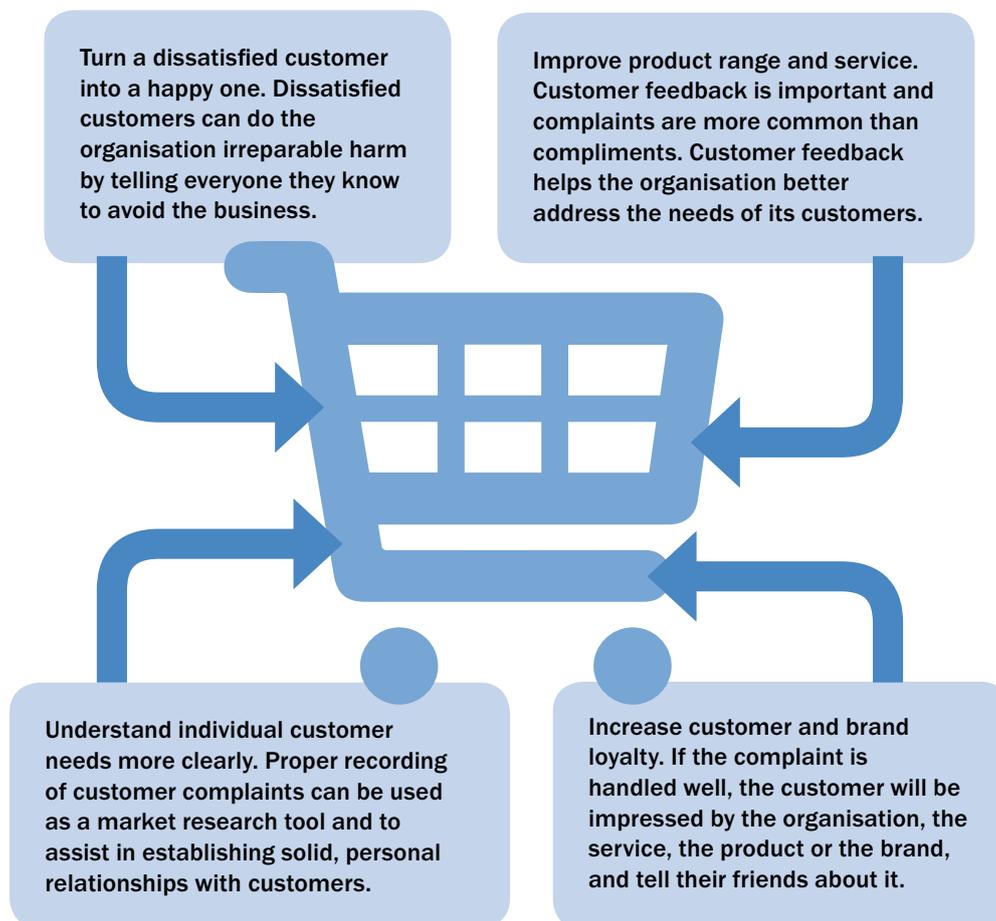
Handle customer complaints

All organisations receive complaints from customers from time to time. When customers complain, an opportunity for the organisation to improve its service arises. Complaints may come from both internal and external customers.

Did you know that approximately 50 per cent of customers who do complain will continue doing business with the organisation? This only happens when a complaint is handled well.

Other unhappy customers will just walk away and then tell 20 or 30 people about their bad experience. 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 leave you.

Every customer complaint gives an organisation opportunities.



Policies and procedures for handling complaints

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

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

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

Every organisation handles customer complaints differently.

Examples of how organisations handle complaints

- 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 the 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.

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

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

Always provide accurate information about a product or service, especially in relation to the price and any conditions during a sale.

Ensure customer details are only used for the purpose stated.

Apologise

When a customer complains, you should apologise sincerely for any inconvenience caused. Even if the customer's complaint is not justified, you should still be concerned about why they are complaining. Apologising does not mean that you (or the organisation) are responsible for the problem. Even if the problem was not caused by the organisation, an apology acknowledges that the customer has been inconvenienced.

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



'I am very upset about the length of time it has taken to process my insurance claim.'

'I apologise for any inconvenience this has caused you.'



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Types of complaints

The types of complaints received from external customers depend on the types of goods and services the organisation offers. Many complaints will be routine. 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

- Administrative errors – incorrect client, product, quantity, price or terms stated on the invoice
- Warehouse/storeroom errors – incorrect product or quantity delivered
- Service errors – repair or service is not adequate
- Delivery errors – products are damaged, lost or delayed during delivery
- General site issues – the office is too noisy, there should be more car parking facilities



Internal customers

- Work not completed on time or to expected standards
- Facilities or resources not available when required
- Mistakes made in appointments, travel itineraries or other scheduling
- Inaccurate records management
- Poor technical support
- Poor interpersonal skills

How to handle customer complaints

Customer complaints are an important asset. You need to handle complaints and angry customers in a professional manner.

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. Do not 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 to 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.

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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 with 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 the request is beyond your control, call a manager. The customer will then be assured that the complaint is being handled 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 of 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 instil confidence in the customer's belief that something is being done.

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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 it has provided the organisation with an opportunity to avoid it happening again by improving its systems and processes.

Tips for handling complaints

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

Tips for handling customer complaints

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

Record complaint details

Recording the complaint accurately is an important task that must always be completed. Ideally it should be completed at the time of the incident so no details are forgotten. This is especially important if the complaint relates to an item's warranty or alleged negligence in carrying out a service.

Many organisations have complaint forms to be filled out by external customers or complaints record forms to be completed by customer service officers. Alternatively, smaller organisations may have less formal but just as important methods of recording the details.

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

- it is clear what has happened
- it 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

Date: 3/10/15

Received by: (Officer's name) Josh Leyton

How received:

- visit telephone letter
 email fax

Customer name: Mrs Evelyn Guthridge

Organisation/home address: 25 Bedford Parade Bardon QLD 4065

Contact details:

Phone: 07 1111 0000

Fax:

Email:

Invoice number: 32100

Order date: 28/9

Product/service: Galvanised iron garden shed Model FA32

- | | |
|---------------------|----------------------------|
| 1 Missing goods | 4 Overcharged |
| 2 Damaged goods | 5 Wrong goods delivered |
| 3 No discount given | 6 Service not as specified |

Additional information: Customer said an agreement was made to receive a 15 per cent discount.

Immediate action: Told customer we will investigate. Thanks for calling. Will get back as soon as possible. Read file for record of transaction.

Further action required: Contact customer with result.

Customer service officer: J Leyton

Practice task 7

Access one of the following websites, then answer the questions that follow.

- www.consumer.vic.gov.au
- www.commerce.wa.gov.au/ConsumerProtection
- www.fairtrading.nsw.gov.au
- www.qld.gov.au/law/fair-trading
- www.cbs.sa.gov.au/wcm
- www.service.tas.gov.au
- www.accc.gov.au

1. Why do you think this organisation exists?

2. List some of the services the organisation offers.

2D

Deliver high-quality service to all customers, including those with specific needs

Some customers may have a physical or mental disability or impairment. They may require extra assistance to access your organisation, communicate their needs or understand your procedures. You should make every effort to accommodate customers with disabilities by anticipating their needs, providing reassurance if necessary and maintaining your professional service. Customers have varying degrees of disability and every customer has individual needs you should be sensitive to.

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 your 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 would usually do, 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.

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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 to reach them. If this happens, you can offer assistance to 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 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

A large percentage of Australia's population were either born overseas or had a parent born overseas.

Cultural diversity means people coming from a different background, race or ethnicity. The differences encompass lifestyle, values, beliefs, ideals, race, ethnicity, national origin, language and religion. Cultural diversity is a feature of the workplace just as it is a feature of the Australian population.

Cultural differences affect the way people think about age, gender, family life, work, dress, food, politics and religion, and the way they do business and relate to each other.

In all your dealings with customers you should remember that all people have different personal needs and expectations, requiring different aspects of your services. When you come across behaviour that you don't understand, try to think about the cultural differences between you and your customer that might be causing the misunderstanding.

Customers for whom English is a second language will have special communication needs.



Tips for assisting customers for whom English is a second language

- Speak clearly and slowly, asking questions to identify exactly what they want.
- Don't use jargon or complicated words. Don't speak in a loud voice.
- Don't pretend to understand if you don't. Instead, politely ask them to clarify what they have said.
- Don't enter into an argument or become impatient.
- In some cultures it is thought to be impolite to move directly to the point of a business discussion.
- If customers just want to talk, ask questions to help steer the conversation back to the topic.

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 their 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 and legislative requirements is an important part of your role.

Important legislation includes:

- *Racial Discrimination Act 1975 (Cth)*
- *Age Discrimination Act 2004 (Cth)*
- *Disability Discrimination Act 1992 (Cth)*
- *Sex Discrimination Act 1984 (Cth)*
- *Human Rights and Equal Opportunity 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 just those three words before leaving home.

1. What was the customer's 'specific need'?

2. How could Joshua have assisted the customer without making her feel uncomfortable?

2E

Promote products and services

There are many ways in which you or your organisation's products and services can be promoted while improving customer relations. Use each opportunity with a customer to identify any other offerings (from you or your organisation) that could help them.

Customer service opportunities

Seek out opportunities to enhance customer service. Go the extra mile!

Often you can simply try to be more flexible; for example, you might be able to extend the time a customer has to pay. You might agree to a customer's request to package the items differently to the way the organisation normally packages its products. Perhaps a customer can only be home to receive a delivery at a specific time – you might be able to arrange a special delivery.

Internally, you might 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.

You should 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 normal procedures.

Promotional opportunities

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.

Take every opportunity to inform customers of the products and services offered by the organisation. For example, you could:

- offer to send advertising, such as the organisation's brochures, pamphlets or flyers
- ask if customers would like to add their names to the customer database so they can receive regular information
- ask if customers would like a demonstration, if this is possible
- offer to make an appointment for customers to see the organisation's salesperson
- direct customers to the organisation's website.

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. For example, the introduction of a new scanner may reduce the time it takes to complete a task, or a new colour photocopier may cut the cost of producing promotional materials or eye-catching reports. Unless staff are aware of the new options, they cannot take advantage of them.

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?
- The customer service charter – How long has it been since this was updated? Are there any items that should be added? Are all new staff members aware of the charter and what it means to them? Does any training need to be undertaken by staff?

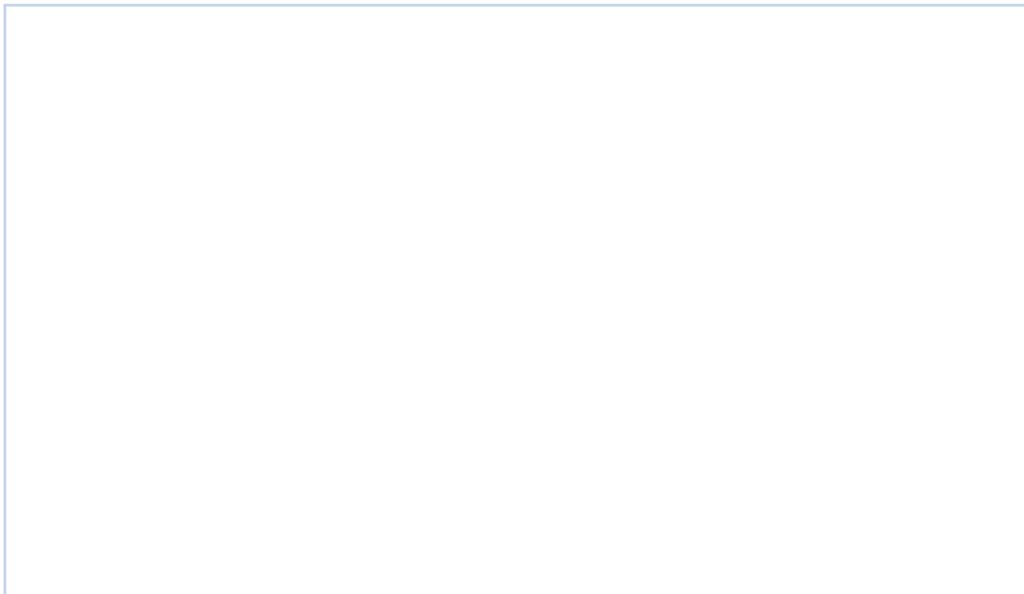
Practice task 9

Describe ways in which the following situations could be used to promote products and services to customers:

1. A customer enters a bookstore to return a book, as he has received another copy as a gift.



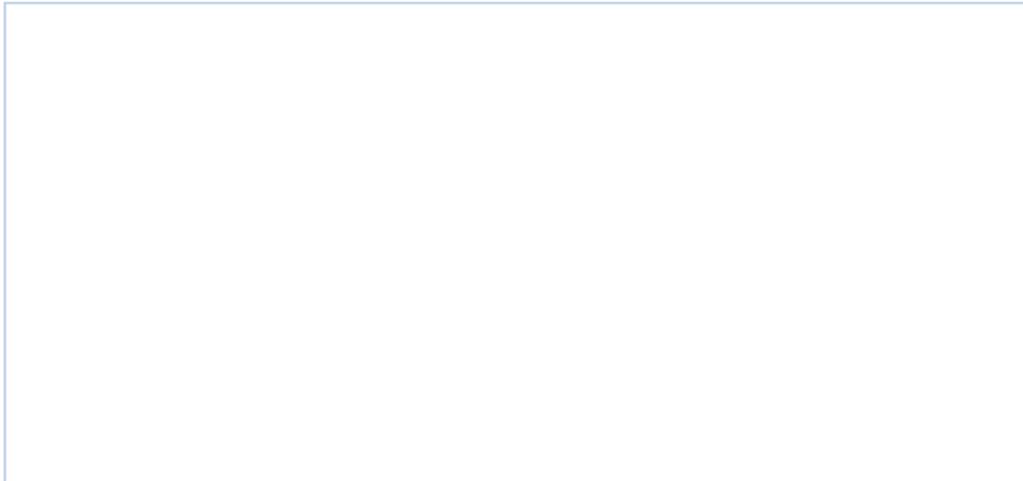
2. A customer intends to buy a small vacuum cleaner but in discussing the customer's cleaning needs, the sales assistant realises that a small appliance will not have the capacity to do the job required.



continued ...

... continued

3. An employee in a car-hire firm is dealing with a customer who wants to hire a minibus for the weekend. He wants to pick up the car on Saturday and return it by Sunday at 5.00 pm. The firm has a special service – for an extra \$40 they will deliver the car to him Friday evening and pick it up from him on Monday morning.



Summary

1. Always give customers more than they expect and try to give them more than you have promised. Deliver service promptly.
2. If the customer's request may not be fulfilled immediately, a prompt acknowledgement and explanation of why and when they can expect to have their needs met is essential to excellent customer service.
3. 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
 - directing 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
 - efficient completion of the sale and gathering of all required data.
4. Dealing with customers with special needs requires:
 - sensitivity and understanding
 - adaptation of customer service practices to cater for diversity.
5. Customer complaints provide an opportunity to improve the organisation. Aim to welcome complaints. Documentation must show that complaints have been recorded and investigated. It must also show if changes have been introduced and the customer notified of these changes.
6. Customers who complain must be treated with integrity and respect. Negative word-of-mouth can have a significant effect in the market or workplace.
7. 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

This learning checkpoint allows you to review your skills and knowledge in delivering a service to customers.

Part A

1. Nada, who has a vision impairment, works in your team. Describe how you would present information she has requested.

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?

3. A call centre operator receives a call from a customer with a very strong accent. She is having difficulty understanding what is being said. What can she do to resolve this situation without alienating the customer?

4. Jim is a paraplegic who needs to see the doctor. He has another appointment with a dentist in the next building in an hour. The doctor is running behind schedule. What would you do for Jim?

5. Imagine you are going to set up a business offering one of the following services:

- Home child care
- Web page design
- Courier service
- Electronic filing and archiving
- Catering

To launch this business you need a customer service charter and you have decided to keep it to a one-page document with six simple statements.

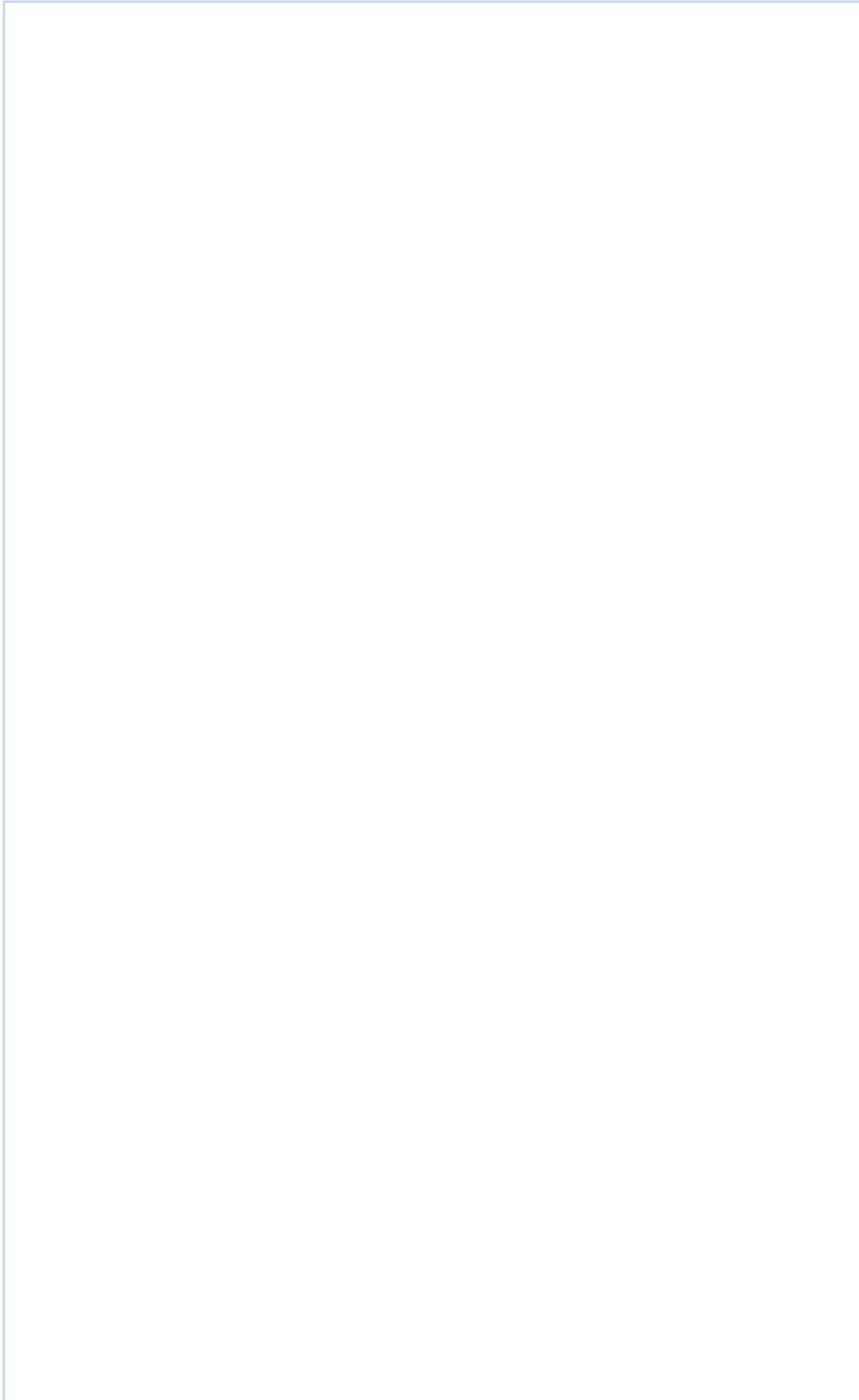
For the service you have selected:

- a) Identify the six most important things you want to promise your customers.

b) Draft your customer service charter.

A large, empty rectangular box with a thin blue border, intended for drafting a customer service charter. The box occupies most of the page's vertical space below the instruction.

- c) Carry out research into the wording and setting out of customer service charters from a variety of sources such as the internet, magazines, product packaging or businesses where services are provided. Using this research, review and finalise your customer service charter.



d) Describe six ways that you would promote 'going the extra mile'.

e) Explain why you chose those particular commitments to your customers.

6. List and describe the policies and procedures available within your organisation that deal with handling customer complaints.

If you are not currently in the workforce, research an organisation you have previously worked for, or make suggestions on the types of policies and procedures that could be applicable in an organisation you are familiar with.

7. List and describe the types of anti-discrimination legislation enacted by the Australian Government to ensure protection for everyone in Australia in regards to participating in activities, regardless of disability, race, sex or age.



Part B

Read the case studies, then complete the tasks and 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, plus a legal clerk, Donna, who mostly works on conveyancing matters. Sal uses an electronic diary in which he asks the three colleagues he supports to list the tasks they need done. The firm is relatively new in the area and they want to gain a reputation for excellent customer service to attract new clients.

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? Develop a schedule for his day.

Wednesday 31 August

- 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 2.00 pm 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 3.30 pm 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 11.00 am please. (Hugh)
- I need to leave early tonight. Can you reschedule my 4.30 pm appointment to early next week? (Mariel)
- Can you make sure those invoices are ready to go out tomorrow? (Hugh)



Case study

Perfect Things is a gift store specialising in unusual and exotic products. They carry wall hangings, pottery and jewellery from Africa; scarves, shells and basketry from the South Pacific; woollen knits and silverware from South America; and glassware made by new Australian designers. Much of the stock is expensive and some of it is fragile.

A family enters the store wanting to choose a gift for Nanna, who is turning 65. Nanna is looking very flustered after shopping with her daughter and two lively grandsons, aged two and four.

2. Outline the strategies the sales assistant could use to:

a) put the mother and grandmother at ease

b) safeguard the stock

c) identify what the grandmother might like for her birthday

d) establish the price range with the mother

e) determine payment preference

f) complete the sale.

Case study

The Keirogah family are loyal customers of a large department store. They have a store credit card and buy most of their clothing, manchester, kitchenware and electrical goods there. Over the years they have been very impressed with the general standard of customer service.

The last purchase they made was a set of six water glasses. At home, they unwrapped the glasses and two of them were cracked. Thinking back they realised that they saw the glasses on the shelves but the sales assistant had obtained a new packaged set from the storeroom to sell to them and the family had not checked them.

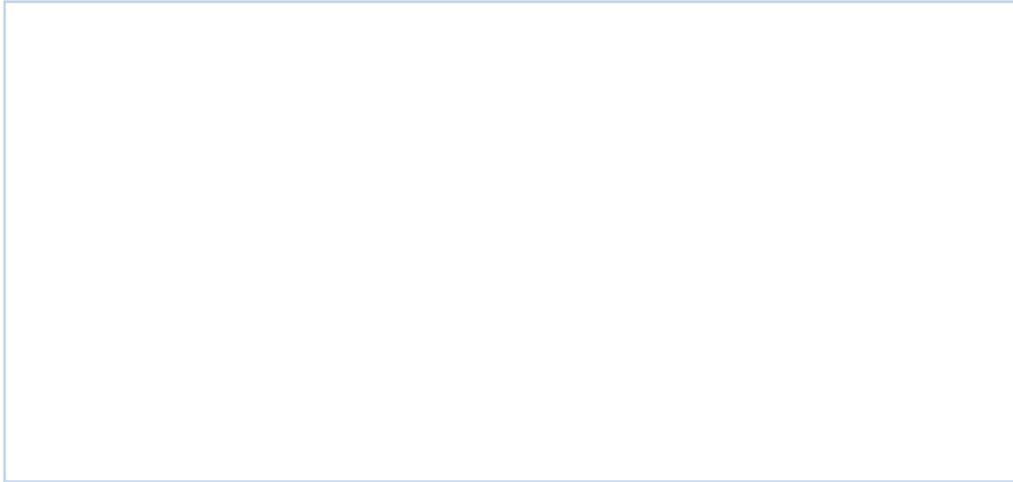
Ms Keirogah takes the glasses back and asks for a refund. The sales assistant says that she does not believe the store is at fault and that someone must have dropped the parcel on the way home from the store. Ms Keirogah is offended by this, as she is sure the parcel was not dropped and feels she is being called a liar. She asks to see a supervisor.

The supervisor comes to the counter and listens to the problem in front of other customers. The supervisor then explains that the store can't really provide a refund, as there is no proof that the store was at fault. Now Ms Keirogah is angry and embarrassed that other people have witnessed the scene. She takes the glasses and leaves the store.

3. The store has now lost a whole family of valued customers. What action should have been taken when Ms Keirogah brought back her faulty goods?

4. What improvements can be made to the organisation's customer service charter or its policies and procedures to enhance its services in the future?

5. What impression do you think this interaction would have had on the other customers who witnessed it?



Topic 3

Monitor and report on customer satisfaction

In a competitive marketplace, where businesses compete for customers, customer satisfaction is seen as a key differentiator. Customer service has increasingly become a key element of any type of business. If customers are happy, they will remain loyal to the organisation and may bring new customers.

In order to improve the service provided, most organisations seek ways to enhance and prioritise their methods for monitoring the feedback they receive from customers. This feedback keeps a business on track by letting them know what they are doing and how they are going.

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. Methods include analysing completed questionnaires, surveys, reports and complaint forms; assessing returned goods; monitoring service calls; and tracking existing or lapsed customers.

In this topic you will learn how to:

- 3A Review customer satisfaction through the analysis of verifiable evidence
- 3B Identify opportunities to enhance the quality of services and products
- 3C Monitor delivery of customer service
- 3D Use customer feedback to improve the provision of products and services
- 3E Report on and recommend improvements to customer service

3A Review customer satisfaction through the analysis of verifiable evidence

Keeping the customer satisfied is a major priority for most organisations. Often, it only takes one mistake for a customer to take their business elsewhere.

Continuous improvement in customer service involves encouraging customers to provide feedback. The information obtained enables the organisation to adjust and modify its products and services to best meet the needs of its customers.



Customers are continually providing information about what they want and don't want, as well as their satisfaction or dissatisfaction.

We like to know how we are going so any method used to source information is useful. Regular monitoring and reviewing of the services provided by the organisation will give it opportunities to improve and enhance its customer service.

Look at the end result

One of the fundamental approaches to obtaining feedback is to look at the end result.

There should be a very clear understanding of what is expected from the process.

The goals should be quantified and used as a benchmark to measure success.

Look at the end 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?

Ways 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.



Talk with customers face-to-face. As they are about to leave your business or office, ask for feedback.



Call 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.



Mail customers a questionnaire. Mailing a questionnaire provides you with a more formal approach to collecting feedback.



Invite customers to take part in electronic surveys. Guide customers to the organisation's website or email a customer service survey.

Analyse the feedback

By regularly analysing the results, an organisation can have a clear view of how they rate with customers. Customer research will tell you what type of service is wanted, how it should be presented, why the service is needed and when it should be available. It will also show how customers want to be treated personally by service providers.

People

Feedback may show a need for training and development programs to drive the culture and awareness of customer service through all levels of the organisation.

Innovation and improvement

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.

Problem-solving

Feedback may provide an opportunity to look at problems, challenges and potential solutions associated with the introduction of a total customer satisfaction philosophy. With practice, you can develop your ability to solve problems so you can deal effectively with customer inquiries and complaints. Observe the strategies used by experienced colleagues, and learn how using feedback to resolve difficulties can ultimately lead to greater customer satisfaction and commitment to the organisation.

Responsiveness

Feedback may highlight the recovery mechanisms and staff authority that exist (or don't exist) to solve customer problems.

Keep three things in mind when analysing and responding to customer satisfaction:

- Don't assume you know how customers feel – ask them regularly in formal and informal ways.
- Be careful not to rely on too small a sample – make sure you use a representative range of your customers.
- Don't react only to the loud complainers – see whether other customers feel the same way.

Surveys and questionnaires on existing products and services

Many organisations produce a customer satisfaction sheet with questions about the product or service that the customer service received.

The questions aim to find out as much as possible regarding how the customer feels about the company and its products or services.



A feedback form can be included with a product, or the customer may be given one directly. A variety of response options, such as mail, email, fax and telephone should be provided to encourage each customer to reply. Some organisations include a 'No postage required if posted in Australia' envelope.

Some organisations provide written survey forms while others post surveys on their website then invite customers to comment, as in the following examples.

Written customer feedback forms

A written customer feedback form is used to seek feedback on products, the purchasing process and delivery. This type of form can be inserted into the product package, posted or handed out to customers. The challenge with this type of form is in having the form returned. 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:****Postcode:****Telephone: Fax:****Email:****How did you hear of our products?** (Give details)

- | | | |
|---|---|-------------------------------------|
| <input type="checkbox"/> company newsletter | <input type="checkbox"/> journal/magazine | <input type="checkbox"/> newspaper |
| <input type="checkbox"/> company mail-out | <input type="checkbox"/> radio | <input type="checkbox"/> television |

advertisement/insert in other publication (which one?)

staff member (which branch?)

other (please specify)

Was this product easy to order and purchase?

Yes

Comment:

No

continued ...

... continued

Was the product delivered on time and in good condition?

Yes

Comment: _____

No

Could you suggest any improvements in our sales and distribution process?

Are you happy with the way our products are packaged?

Yes

Comment: _____

No

Are you happy with our customer service?

Yes

Comment: _____

No

Thank you for your feedback!

Website customer satisfaction forms

In order to save costs in preparing hard-copy forms and for ease of administration, customer satisfaction surveys are often posted on the internet 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 workplace's privacy policies and procedures.

Customer satisfaction survey

First name* _____

Surname* _____

Your organisation* _____

_____ **State*** _____

Your email* _____

Product/service used* _____

How satisfied were you with the product/service?

- Very
- 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: _____

*** These fields must be completed**

Training feedback forms

Training feedback forms or evaluation forms, such as the one below, are usually given out on completion of a training session. This information gives the trainer feedback on how well the session was conducted and areas for improvement.

The Training Network Managing change seminar

We welcome your comments about our seminar. Your information will help us continue to provide the highest quality service to our clients.

Name: (optional)

Position:

Did the presentation provide you with the sort of information you required?

Yes No

What other information would have assisted you?

Rank the session from 1 to 5 (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

What other issues do you think should have been covered?

How did you hear about this seminar?

Please comment on the venue: parking, location, facilities and services.

Thank you for taking the time to answer these questions!

New products and services

If an organisation is considering producing a new product or offering a new service, it may prepare a questionnaire to gauge customer feedback.

The questionnaire may seek to determine:

- customer satisfaction with existing products
- customer interest in purchasing the new product or service
- the price the customer is willing to pay for the new product or service
- whether the new product or service will meet customers' needs.

Example: customer research survey



Here is an example of a customer research survey.

Power Equip research survey

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.

Your response will be entered in a draw to win a complete home gymnasium, to be drawn on 30 October.

1. What Power Equip merchandise are you currently using?
2. When did you last purchase a Power Equip product or service?
3. What motivates you to purchase a Power Equip product or service?

continued ...

... continued

Example: customer research survey

Power Equip research survey (cont'd)

4. What amount do you generally spend at Power Equip?

Circle the relevant price range:

- Less than \$50
- \$50–\$99
- \$100–\$149
- \$150–\$199
- \$200+

5. How important are the following points? Rate from 1–9, with 1 being the highest importance.

- | | |
|----------------------|--------------------------|
| <input type="text"/> | Competitive prices |
| <input type="text"/> | Range of products |
| <input type="text"/> | Store location |
| <input type="text"/> | Quality of service |
| <input type="text"/> | Quality of products |
| <input type="text"/> | Store opening hours |
| <input type="text"/> | Store layout |
| <input type="text"/> | Delivery/pick-up options |
| <input type="text"/> | Loyalty program |

6. Would you be likely to use a mail-order service?

Notify customers

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 that will be made as a result of their feedback. The same applies to the organisation's staff.

Further, when you implement the suggested changes, notify customers that this has occurred because of their feedback. This is an essential element that must not be overlooked. Keeping a customer informed of developments shows that they are special, valued and listened to. Posters, memos on bulletin boards, notices in magazines or newspapers, email notices and updates at meetings are some of the ways to share feedback with all stakeholders.

Staff within 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. Avoid sharing the results in a way that demoralises or lays fault as this can reduce any prospect of improvement.

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



Practice task 10

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

Case study

A small publishing business develops and sells booklets that contain current reviews and ratings of establishments such as restaurants, second-hand clothing or book stores, 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 facility.

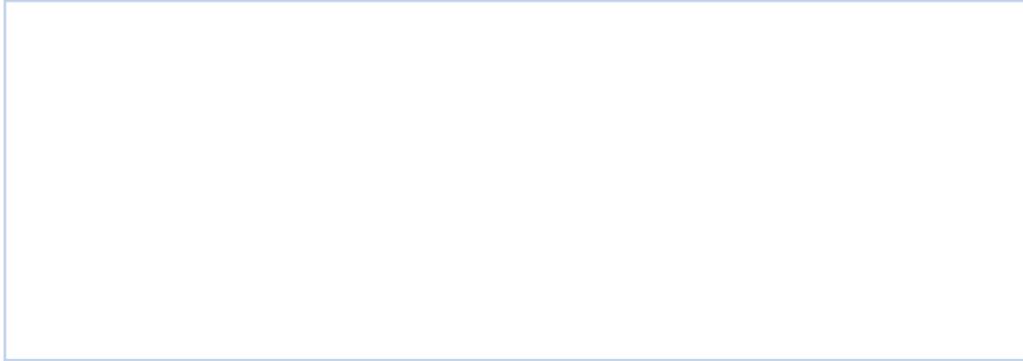
1. Describe the other factors the company should consider before making a decision about an online facility.

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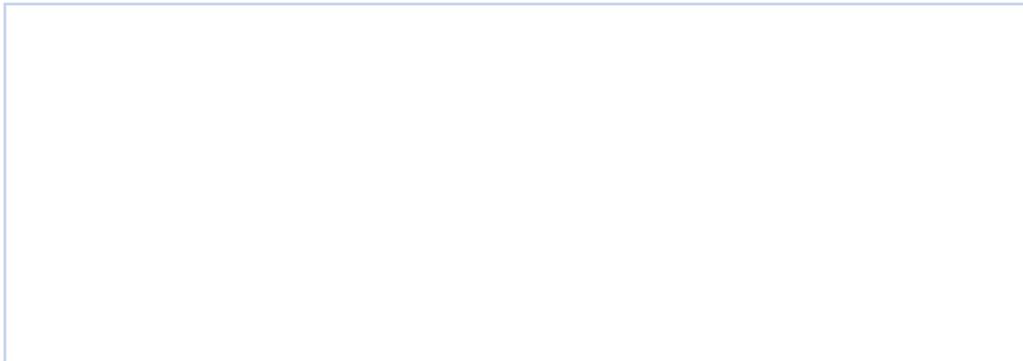
... continued

Practice task 10

2. 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 losing sales. Describe how the business could find out whether the end users would really purchase online?



3. Explain how the company could deal with complaints that may come from its other customers – the bookstores – who might consider that the company is being disloyal to them.



3B

Identify opportunities to enhance the quality of services and products

Every progressive customer-focused organisation will identify all types of opportunities to enhance the quality of its services and products.

The challenge facing many organisations is improving products and services, particularly when the business is already highly efficient. However, with a high degree of innovation, organisations can still find creative ways to enhance their products and services.

An organisation relies on the motivation of people at all levels for obtaining feedback. Customer service is everyone's responsibility. Be observant, listen and talk with customers.

Customer loyalty programs

Some organisations have created customer loyalty programs; for example, awarding points, reward schemes and company-specific credit cards. With the introduction of these types of programs, data on the buying habits of customers is obtained so that new and different products and services can be introduced. Once a customer has joined a program and the relationship is established, there are new opportunities to communicate with the customer regarding other products and services.

Feedback from frontline operators

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.

Feedback from staff

Staff who are given more opportunities to address customer service issues will increase and improve the level of service. When given the chance to resolve problems, staff often lose the pass-the-buck attitude prevalent in many organisations. They take pride in being able to help another person and provide a service that is seen as valuable.

Practice task 11

Contact two local organisations that know you well or think about organisations you are familiar with. The organisation may be your bookstore, restaurant or hairdresser. Discuss the following questions with the business owners or operators, or research the organisations on the internet.

What methods do they use to monitor customer satisfaction?



3C

Monitor delivery of customer service

Sometimes an organisation may not have the facilities to create loyalty programs, send out customer satisfaction forms or provide complaint forms to monitor customer demographics or the level of service received.

Instead, they rely on other forms of feedback to assist in monitoring service delivery.

Some organisations rely on informal feedback only, such as the customer writing to the organisation or discussing their problem with the receptionist or a salesperson. Their views should be promptly passed on to the relevant person by email, memo and telephone or in person. It is sometimes easy for this type of information to be filed away and forgotten unless the organisation has a system to analyse and respond to the comments.



Incoming calls

Another way of determining where product or service problems occur is to analyse incoming calls. This will indicate where customers are finding they need to contact the company; for example, the completed form below indicates that many customers have called about the organisation's new product. There may be a number of reasons for this: customers may be encountering problems with the new product or there may be a problem with the ordering, purchasing or distribution processes set up for the new product. Or they may be telephoning to compliment the organisation on the product.

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

Customer calls records						
Area	9:00am–10:00am	10:00am–11:00am	11:00am–12:00pm	12:00pm–1:00pm	1:00pm–2:00pm	2:00pm–3:00pm
New product	✓✓✓ ✓✓✓	✓✓✓ ✓✓✓	✓✓✓	✓✓✓	✓✓✓ ✓✓✓ ✓	✓✓✓
Current products	✓✓	✓✓	✓✓✓	✓✓✓	✓	
Advisory service	✓	✓✓		✓✓✓	✓✓✓	
Promotions	✓✓			✓		✓

Supply more information

This client form is designed to supply more information. This reduces the need for follow-up research and any problems 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.

continued ...

... continued

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.
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Monitor returned goods

A record of goods returned to an organisation should be kept. This information alerts the 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 are returned.

Track existing and lapsed customers

Many organisations use a management system to keep track of their customers. This might be electronic or it may be a paper-based filing system.

This data provides information regarding customer buying patterns. It will also clearly indicate whether customers have stopped purchasing from the organisation. Staff members are then able to contact these lapsed customers to see why they have not dealt with the organisation recently. In many cases the reason might be straightforward; for example, they no longer need the service or product. However, in some instances the customer may have been dissatisfied and decided to take their business elsewhere. In these cases you can try discussing their difficulties, assuring them they will receive quality customer service from the organisation in the future.

These systems record:

- the type of purchase (service or product)
- the volume purchased
- the amount spent
- the type of organisation or customer who purchased
- where the customer is located
- the frequency of the purchase
- 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 the action the company took.

On one form, a 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 telephoned 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 of delivery but the customer had not been notified of the consequent delay.



Practice task 12

Explain the benefits to the organisation of recording informal customer feedback.

3D

Use customer feedback to improve the provision of products and services

Improving customer service is an ongoing and very important process. Quality assurance systems include not only collecting feedback from clients, but also responding to it by improving work practices. This is called 'continuous improvement'.

Continuous improvement is usually easily definable in a manufacturing or production environment. However, it is often difficult to define in a successful service-driven organisation.

How organisations continuously improve varies from one organisation to another. Some have formal, structured systems in place to deal with the information, while other businesses may discuss the information then make decisions informally.

Customer comments might form the focus of a whole-staff or group meeting where everyone is invited to contribute ideas and suggestions for improving customer service.

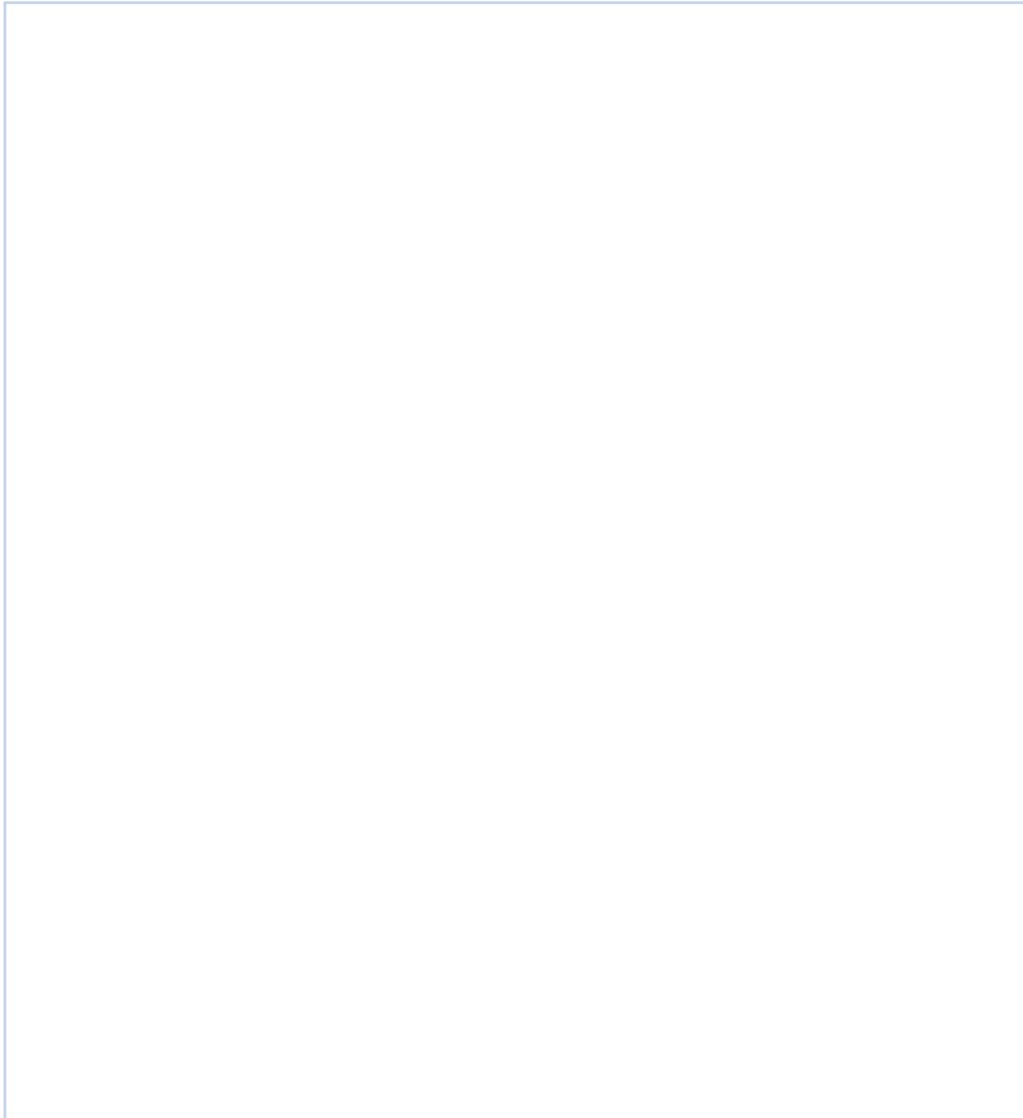
Ideally, information should be categorised into 'complaints', 'compliments' and 'comments'. An organisation can use the information collected to achieve a number of things.



Practice task 13

Some people believe it's not worth complaining or providing suggestions for better service because nothing will ever get done. Which of the following suggestions are most likely to be acted on and why?

1. 'I like your bread rolls but the flour you dust them in gets all over my clothes. Can you do something about the flour?'
2. '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?'
3. 'The security officer at your front door is very abrupt. Surely an electronic security device would be more appropriate?'



3E

Report on and recommend improvements to customer service

You may be required to prepare a report outlining the results of the customer feedback you have received, in which recommendations are made for improvements to customer service.

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

Format the report using graphics, tables, charts or other features that enable the data you have gathered 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.

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 gather the information or feedback, so the reader can see how you obtained the information. Recommendations should be bulleted in a list, with brief but clear descriptions.

The report should include:

- a title that reflects what the report is about
- 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
- a cover page, a list of contents and an executive summary (depending on the audience and purpose of the report).

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 on managing change.

Read the report and then answer the questions below.

The Training Network Evaluation of seminar

Introduction

In October, the Training Network conducted a seminar on Managing Change. The one-day seminar 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 seminar, 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 seminar met their needs and what sessions they would like in the future. (See attached survey.)

Results

The seminar 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 like 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:

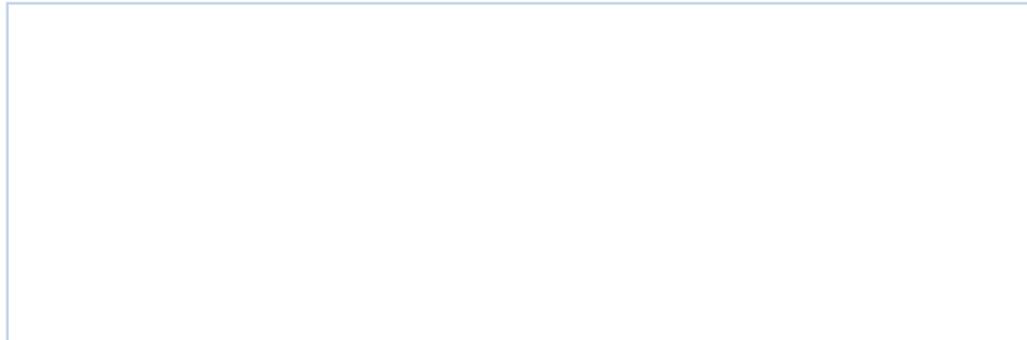
- improving promotional brochures and handouts
- reviewing the speakers
- looking at different venues that have better parking facilities.

1. In this example, was the information that the organisation received valid?

continued ...

... continued

2. How valuable do you think it would be to the organisation?



Summary

1. Customer satisfaction with an organisation directly influences the organisation's ability to develop and prosper.
2. 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.
3. There are many ways to capture customer feedback: observation, questionnaires, face-to-face, by telephone.
4. Databases can be used to monitor customer satisfaction; for example, analysing the number of:
 - complaints recorded and from whom
 - returned goods
 - lapsed customers over a designated period of time.
5. Organisations are constantly creating new and innovative methods for obtaining customer feedback and providing improved customer service or products.
6. Continuously improving customer service gives an organisation a competitive edge.
7. Research and analysis can be presented in comprehensive reports so that decision-makers within the organisation can plan and fund improvements.

Learning checkpoint 3 Monitor and report on customer satisfaction

This learning checkpoint allows you to review your skills and knowledge in monitoring and reporting on customer satisfaction.

Part A

Identify three organisations, public or private, where you are a customer. Imagine that you have been asked to participate in a customer survey. Answer the following questions for each organisation.

1. What style of interaction do you have with the organisation? (For example, contact that is over-the-counter, telephone, online or via post.)

2. How long have you been a customer with the organisation?

3. If longer than 12 months, what keeps you coming back to the organisation?

4. In what way/s does the organisation encourage feedback?

5. Has any person in the organisation contacted you regarding customer service, at any time?

6. Have you ever had any cause to complain to the organisation?

7. Was your complaint dealt with promptly, efficiently and pleasantly?

8. Do you have any suggestions for ways in which customer service could be improved in the organisation?

9. Compare the three organisations you have chosen. Which has the most responsive customer service? Why?

10. Write a short report on your findings.

11. List and describe the organisational standards, policies and procedures available within your organisation that deal with responding to and recording customer feedback.

If you are not currently in the workforce, research an organisation you have previously worked for, or make suggestions on the types of standards, policies and procedures that could be applicable in an organisation you are familiar with.

Part B

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

Case study

A customer contacts a local consulting firm that places administration workers into positions in small businesses. The customer asks whether the company offers training in job hunting, interview skills and so forth. They do not.

After three more similar inquiries, the company begins to think it might be a good idea. They decide to collect some details from each person who asks about training and establish a file on what people want.

1. What other research needs to be carried out before the company decides to go ahead with this suggestion?

2. If the company decides not to go ahead with the idea, what other service could it develop to meet its customers' needs?

Case study

Remarkable Insurance has been receiving a lot of complaints recently regarding the quality of its customer service. The manager reviews the complaints record over the past month and finds the following common areas of dissatisfaction:

- Consultants are having difficulty explaining the details of the new '60s Plus Policy' over the phone. They find they are confusing, rather than clarifying, matters.
- Nobody wants to take responsibility for customers' accounts. The customer gets passed from sales to finance to claims and no-one in-house seems to talk to anyone else.
- Customers find that promises made by the sales staff when promoting the policies are not kept by the claims department.
- For an insurance company that markets itself as servicing the elderly, the office surrounds are not very user-friendly; for example, there are not many chairs and lots of steps.

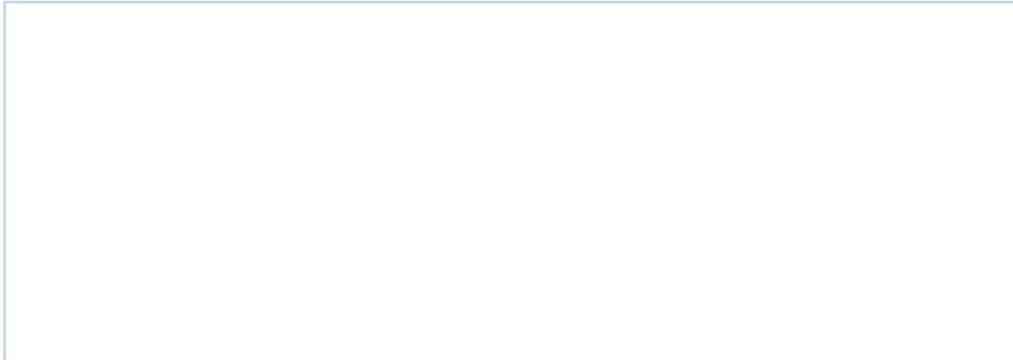
The manager decides to call a staff meeting to discuss ways to overcome these issues.

3. Draft an internal customer service charter and an external customer service charter for Remarkable Insurance. Keep them simple, preferably in bullet points.

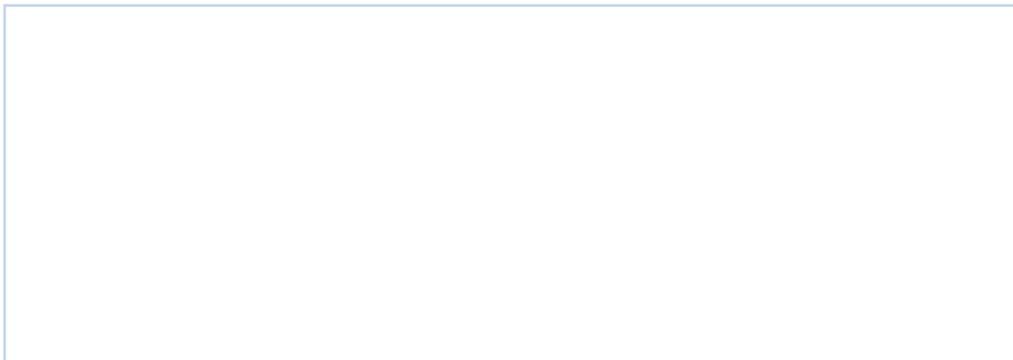
4. What training might be needed to promote a more effective culture of customer service?



5. What strategies could be used to let customers know that steps have been taken to respond to their complaints?



6. What strategies would you implement to ensure the new charters are effective and that they lead to improvement in meeting customer needs?



7. Present your responses as a series of PowerPoint slides that could be used to gain staff acceptance of the charter.

Case study

A toy library that is run by a local council surveys its borrowers to find out whether they should carry toys associated with violence; for example, guns, swords, knives, police batons, handcuffs, lassos, bows and arrows and computer games. In the interests of simplicity the borrowers are asked to tick in the YES or NO column on the survey, which is placed next to the checkout desk. It is there for two weeks. Normal borrowing time is four weeks.

Thirty of a possible 142 borrowers responded. The result was that 62 per cent of the respondents were in favour of the toys, 28 per cent against.

8. Do you think this was a valid survey? Why or why not?

9. Describe other feedback strategies that could have been used to improve customer service.

