

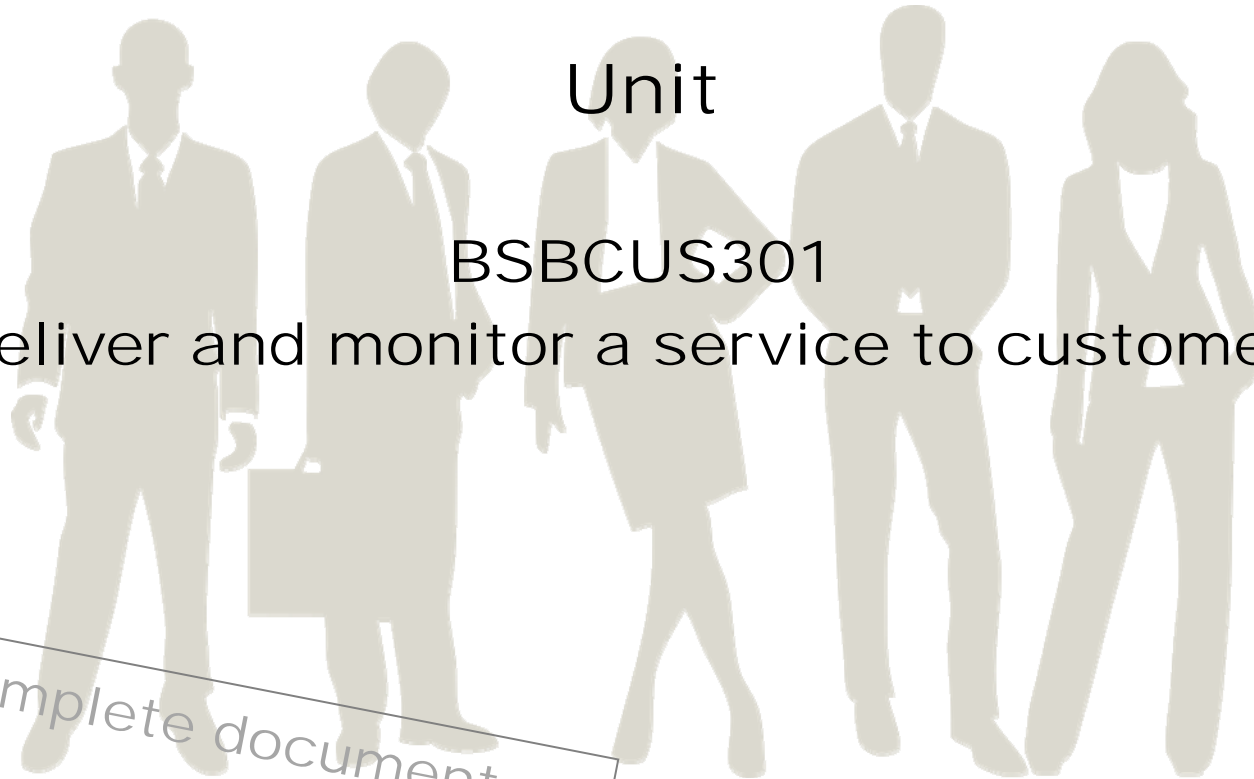
BSB - Business Services Training Package

BSB30115—Certificate III in Business

Unit

BSBCUS301

Deliver and monitor a service to customers



*This is not a complete document.  
SAMPLE ONLY*

Teacher/Trainer Manual



LANE

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## STUDENT/TRAINEE DETAILS

**Student/Trainee Name****Student/Trainee Email****Teacher / Trainer Name****School / Institution / Training Organisation / Employer**

SAMPLE SAMPLE

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## INTRODUCTION

This manual is developed to provide training content that addresses the specific 'Unit of Competency' as outlined on the following pages.

It provides the teacher and/or trainer with a document that includes all that the student and/or trainee manual content plus guidance notes as well as answers to the learning activities in the student/trainee manual.

This manual can be packaged with various manuals addressing other 'Units of Competency' in order to meet the 'Packaging Rules' of a particular Australian Training Package Qualification.

This resource has been designed to be delivered in a form that is conducive to the learning environment including:

- ☆ Online delivery
- ☆ Classroom delivery
- ☆ On the job training

The documents are designed in a 'landscape' format in order to make reading on a computer screen easier as well as reduces the need to scroll down pages. Documents can be easily printed if the learning environment requires the student or trainee to have hard copies of the learning materials.

## INTRODUCTION—CONT'D

### LEARNING ACTIVITIES

The learning activities in the student and/or trainee manuals are 'Form Enabled' so that if the resources delivered online, the activities can be filled in using the computer keyboard.

Each learning activity is identified with the following icon.

**Learning  
Activity**

Learning activities come in the following forms.

- ☆ Questions
- ☆ Research
- ☆ Tasks
- ☆ Interviews

#### ***Questions***

Questions would relate to the information presented on previous pages.

#### ***Research***

This type of learning activity would require the student or trainee to locate information by using research methods. The information they would be required to locate would be in line and/or support the information that the manual had outlined in previous pages.

## INTRODUCTION—CONT'D

### **Tasks**

This learning activity type would require the student/trainee to actually do or undertake something and would be reinforcing the knowledge they have gained from reading the manual's previous pages.

### **Interviews**

This learning activity type would require the student/trainee to interview person(s) in an actual workplace environment or a person(s) who are experienced in the industry sector which the student/trainee is currently undergoing training.

The student/trainee is made aware of the type of learning activity by noting the learning activity type displayed under the learning activity icon.

Learning  
Activity

Research

## SELF ASSESSMENT

At the end of each manual is a series of questions that the student/trainee should review and answer.

This self assessment is to ensure in the student's or trainee's mind that they have reviewed and understood the information that was presented in their manual.

If they are unsure of their understanding in any of the topics reviewed, they are encouraged to go back and review the information again and/or seek the assistance of their teacher or trainer.

## UNIT OF COMPETENCY OVERVIEW

The following pages are extracts from Training.gov.au website and outlines this specific 'Unit of Competency' including the 'Elements' and the 'Performance Criteria'. The content within this manual has been developed to address this unit.

### BSBCUS301 DELIVER AND MONITOR A SERVICE TO CUSTOMERS

ELEMENT	PERFORMANCE CRITERIA
<b><i>1 Identify customer needs</i></b>	<ul style="list-style-type: none"> <li>1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations</li> <li>1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements</li> <li>1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options</li> <li>1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals</li> </ul>
<b><i>2 Deliver a service to customers</i></b>	<ul style="list-style-type: none"> <li>1.1 Provide prompt service to customers to meet identified needs in accordance with organisational and legislative requirements</li> <li>2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery</li> <li>2.3 Sensitively and courteously handle customer complaints in accordance with organisational and legislative requirements</li> <li>2.4 Provide assistance or respond to customers with specific needs according to organisational and legislative requirements</li> <li>2.5 Identify and use available opportunities to promote and enhance services and products to customers</li> </ul>



## LANE

<b>3 Monitor and report on service delivery</b>	<ul style="list-style-type: none"><li>1.1 Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements</li><li>3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational and legislative requirements</li><li>3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements</li><li>3.4 Regularly seek customer feedback and use to improve the provision of products and services</li><li>3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery</li></ul>
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# Section One

## Identify Customer Needs

SAMPLE SAMPLE

# DELIVER AND MONITOR A SERVICE TO CUSTOMERS

## SECTION ONE – IDENTIFY CUSTOMER NEEDS

### INTRODUCTION

The most important person in any business is the customer. It is the customer that provides the business revenue to keep functioning. This will only happen if the business identifies what the customer needs. In this section we look at how a business would identify a customer's needs.

### SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Using interpersonal skills to identify customer needs and expectations
- ☆ Assessing urgency levels of customer needs
- ☆ Using effective communication skills when offering options to satisfy their needs
- ☆ Identifying limitations to the ability to satisfy customer needs



## USE APPROPRIATE INTERPERSONAL SKILLS TO ACCURATELY IDENTIFY AND CLARIFY CUSTOMER NEEDS AND EXPECTATIONS

To start this section off, we will first learn about what a customer is.

Most people immediately think of a customer as one that walks into a retail store and buys a product. This is an individual customer. However, a customer could also be a large organisation, groups of people or government agencies.

These are all external customers and these customers are essential to any business's survival. They buy the companies products and/or services for money and the money these customer's spend keeps the business functioning.

Then there is the internal customer. An internal customer is one that works within an organisation and provides services to other parts of the organisation.

For example, a larger operation may have staff that are:

- ☆ Personnel managers
- ☆ IT managers
- ☆ Purchasing managers
- ☆ Sales personnel

...and many more.

Other employees of this organisation may require assistance or service from others in the operation and would expect the same level of customer service from internal service providers as external customers would. They would expect:

- ☆ Friendly and helpful interaction
- ☆ A desire to identify and satisfy the other's needs
- ☆ Accurate and relevant information
- ☆ Willingness to resolve issues satisfactorily
- ☆ Provide a quality service as needed or requested

High internal customer service standards ensure that all departments and employees work together efficiently and to the benefit of all.



## IDENTIFYING CUSTOMER NEEDS AND EXPECTATIONS

For the customer's needs and expectations to be adequately serviced, you must first fully understand what those needs or expectations are.

To do this, you need to ask questions and listen carefully to the answers. It must always remain a two-way conversation.

It is also important that you confirm the details with the customer by repeating them back to the customer and asking the customer to clarify details you do not understand. In this way you can be assured that you are assisting them in the most appropriate way.

Basically, these simple steps should be followed:

- 1) Ask the customer how you may assist them
- 2) Listen carefully to what they say
- 3) Ask questions to further clarify their requirements
- 4) Again, listen carefully to their answers
- 5) Clearly repeat the details back to the customer
- 6) Ask questions about details you still do not understand or may have missed
- 7) Listen carefully to their answers
- 8) Again, repeat the details back to the customer

A good communicator listens as much as they speak. Keep following those steps until both you and the customer feel that you have a full understanding of their needs, expectations or preferences.

Those previous steps are especially important when a customer is unsure of his or her needs or preferences. They may not know exactly what they want.

In this situation, questions and resulting answers may start off in very general terms. However, as the questioning continues, the needs, expectations or preferences of the customer become more defined and you are then more able to satisfy those needs, expectations or preferences.

Sometimes in these situations you may feel frustrated. It is important, however, to always maintain a friendly facial expression, use a calm, courteous tone of voice and give the customer your undivided attention. This will keep the customer relaxed and in turn make them easier to serve.



## QUESTIONING SKILLS

The needs or preferences of a customer can only be fully understood by skilful questioning and listening.

The method of questioning can also affect the mood and comfort of the customer.

There are basically two types of questions:

- 1) Open-ended questions
- 2) Closed-ended questions

An open-ended question allows the customer to speak freely and describe what they may require. These questions generally begin with the words *What, When, Where, Why, How* and *Who* (E.g. Q: 'How may I help you?' A: 'Well, I'm looking for a...').

A closed ended question usually attracts an abrupt or single word answer such as 'yes', 'no', or 'good' and is likely to make the customer feel uncomfortable.

These questions generally begin with the words *Do, Are*, and *Can* (E.g. Q: 'Do you need any assistance?' A: 'No thanks'). The time taken to understand a customer's needs or preferences would also increase by asking closed-ended questions.



## LISTENING SKILLS

Active or attentive listening after each question is extremely important. This will ensure you are getting as much information as possible from the customer and also make the customer feel you have an interest in their needs, expectations or preferences.

Listening skills should include showing the customer undivided attention through eye contact, body language (E.g. nodding of the head) and verbal acknowledgement (E.g. saying, 'Yes, I understand').

While listening you should take note of the customer's tone of voice, body language and facial expressions. These are important clues as to what they are thinking, how they are feeling, what may be important issues to them, what they may be uncertain of and how you should deal with them.

(E.g. an outgoing, happy customer will enjoy a bright sales person who makes the process fun, while a quiet, shy customer will appreciate a calm, polite staff member who makes the process simple, and again, a customer who is in a rush will appreciate a staff member who is willing to help them as quickly as possible).

Give the customer constant feedback. This will give the customer confidence that you are gaining an understanding of their needs or preferences.

When providing information that would be important to the purchasing decision, it is especially important to give the customer feedback. Information should be given to customers in amounts that they can easily absorb, rather than overloading them with information.

Customer feedback can include facial expression and body language. It could also be what they say or comments made that may lead you to believe that they may not fully understand the information given. Subtly ask if they understood the information you have provided them (E.g. 'Have I confused you at all?').

**Learning  
Activity**

## Question

**LEARNING ACTIVITY ONE**

What were the eight simple steps outlined in this section that a salesperson could use to identify a customer's needs and expectations?


SAMPLE SAMPLE



***TEACHER/TRAINER GUIDANCE NOTES***

- 1) Ask the customer how you may assist them
- 2) Listen carefully to what they say
- 3) Ask questions to further clarify their requirements
- 4) Again, listen carefully to their answers
- 5) Clearly repeat the details back to the customer
- 6) Ask questions about details you still do not understand or may have missed
- 7) Listen carefully to their answers
- 8) Again, repeat the details back to the customer

**Learning  
Activity**

Question

**LEARNING ACTIVITY TWO**

How do you show you are using attentive or active listening skills?

**TEACHER/TRAINER GUIDANCE NOTES**

Active/attentive Listening skills include showing the customer undivided attention through eye contact, body language (E.g. nodding of the head) and verbal acknowledgement (E.g. saying, 'Yes, I understand').

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY THREE**

While listening to a customer's responses back to you what should you be noting and why?

***TEACHER/TRAINER GUIDANCE NOTES***

While listening you should take note of the customer's tone of voice, body language and facial expressions. These are important clues as to what they are thinking, how they are feeling, what may be important issues to them, what they may be uncertain of and how you should deal with them.

SAMPLE SAMPLE



## ASSESS CUSTOMER NEEDS FOR URGENCY TO DETERMINE PRIORITIES FOR SERVICE DELIVERY ACCORDING TO ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

There will be numerous occasions when you will encounter a customer that has urgent needs. You will need to assess the customer's level of urgency and how you and/or the business will address the urgency.

For example, you may work in a business that sells and installs large computer systems and one of your customers has called with a problem that needs fixing. The customer's operation relies heavily on the computers so this request would be considered urgent and would need to be addressed as a high priority.

Other urgent needs of customers are sometimes the provision of information. For example, a customer needs prices on a product you sell and whether or not it is in stock for immediate delivery. This urgent need of a customer can be handled quickly by providing the information the customer is seeking. In these cases be sure to ask questions just to ensure you fully understand the request of the customer.

In most cases customer's urgent requests that would need to receive a high priority would be those that:

- ☆ Affect or could affect the health and safety of a person or persons
- ☆ Have a serious adverse economic effect on the customer (such as the loss of production or revenue)
- ☆ Have a serious effect on the environment

If these urgent requests are not adequately addressed in a timely manner, it could have serious legal ramifications to the company both from a law suit to fines as a result of breaching WHS or environment laws and regulations.

Depending on the type of business and the products and/or services they offer, there would often be organisational requirements that relate to dealing with urgent requests from customers.

These would dictate the policies, procedures on how to address urgent customer requests and who is responsible to ensure these urgent requests are addressed adequately.

As with all other types of customer requests or needs, taking the time to fully understand those requests or needs allows you to prioritise the requests more effectively.

SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FOUR**

In this Section we learned three types of requests from a customer that would require the business to put a high priority on the request as to their response. What were those three types?


**TEACHER / TRAINER GUIDANCE NOTES**

In most cases customer's urgent requests that would receive a high priority would be those that:

- 1) Affect or could affect the health and safety of a person or persons
- 2) Have a serious adverse economic effect on the customer (such as the loss of production or revenue)
- 3) Have a serious effect on the environment



## USE EFFECTIVE COMMUNICATION TO INFORM CUSTOMERS ABOUT AVAILABLE CHOICES FOR MEETING THEIR NEEDS AND ASSIST IN THE SELECTION OF PREFERRED OPTIONS

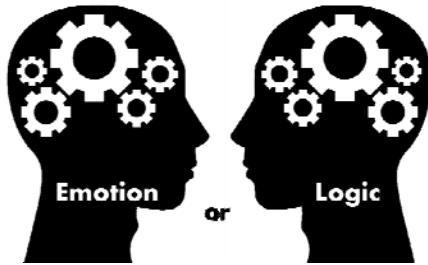
We now know that the first and two most important skills you would need to develop are questioning and listening skills. Without those skills you would be unable to determine what a customer is wanting.

The first thing you must remember is that when you ask a customer a question, you need to wait for an answer.

Then you are able to evaluate what the customer has told you and you can then start formulating an answer in return.

As you are questioning and the customer is responding, a buying decision is starting to form in the customer's mind.

It is important to realise that emotions, logic or a mixture of both can sometimes influence the customer's buying decisions. By questioning the customer and listening to their answers, you will get a feel on how to present the products or services you believe will satisfy those needs.



### EXAMPLES OF LOGIC VERSUS EMOTION

**Man #1** comes into mobile phone store and wants to buy a new phone to replace the one he already has. His current phone is still in perfectly good working condition, but he wants one that looks more modern and has more features.

**Man #1's** buying decision will most likely be based on emotions. He does not seem to have a real grasp on what features, type, make, or brand of phone he wants, just the desire for the new phone to look good and have a bunch of neat features.

Another fellow, **Man #2**, comes into the same store and wants to buy new phones for his staff. He illustrates his need for phones that have a long battery life, that are durable and that come with hands free kits for cars.

**Man #2's** buying decision will be based on logic. They are not for himself. He knows exactly what the phones need to have, as far as features and accessories.

**Teenage Girl #1** comes into the same phone store. Her parents have requested that she needs to buy a phone for security reasons when she is out at night with her friends. The daughter wants the latest phone that is considered trendy and cool, but her parents have set a money limit.

**Teenage Girl #1's** buying decision will be both logical and emotional. She knows how much she can spend, and she needs the phone for safety reasons. However, the final choice will be based on emotion. The phone will need to be trendy and cool.



## CUSTOMER REQUIREMENTS

Within numerous industry sectors there are an endless amount of products and services being offered.

As we know now, is that no matter what the product or service is, it must match the needs of the customer.

Generally there are common customer needs or requirements that affect the suitability of a product or service meeting those needs or requirements.

They include:

- ☆ age suitability
- ☆ colour preferences and style
- ☆ culture and ethnicity
- ☆ durability, function and usage
- ☆ customer's existing skills and knowledge on the product usage
- ☆ meeting the trends, fashion and preferences
- ☆ health factors
- ☆ wide ranging interests
- ☆ lifestyle
- ☆ price and affordability
- ☆ size
- ☆ usage requirements





### **MATCHING A PRODUCT TO A CUSTOMER'S NEEDS**

Once the customer is directed to a product or service considered by the staff as matching their requirements, it is now the time to fine tune the actual customer's needs.

Buying decisions are sometimes made when there are underlying needs to be satisfied.

This may have nothing to do with the product itself. It may be safety issues, how the product performs, what the product looks like, whether or not it is durable enough and how much it costs.

For example, it is pointless to start selling a customer a home entertainment system that cost \$1000, when the customer can only afford to spend \$500.

Or, it would not be in the best interest of the customer who is a tradesperson to be sold a cordless drill designed for a home handyman rather than suitable for heavy duty usage.



## Safety

- ☆ Is it safe for the home, children, and pets?
- ☆ Does the customer feel emotionally safe with the product?
- ☆ Will the customer have used similar products in the past, and therefore feel safe using it?
- ☆ Will the product avoid physical harm or danger?

- ☆ Does the product do as they claim?
- ☆ Will it do what the customer wants it to do?
- ☆ Is it easy to use?
- ☆ How does it compare with other products?
- ☆ Will the customer enjoy using it?

- ☆ Does the customer like the look of the product?
- ☆ Does the customer feel good about the product or does it enhance their self-image?
- ☆ Is there a status element attached – prestige brand or product?
- ☆ Does the customer like the colour, style, size, shape and smell?

- ☆ Will it last as long as the sales person says it will?
- ☆ Will it manage the hard use the customer may give it?
- ☆ Will it last as long doing other things with it?
- ☆ What are the maintenance requirements?



### **Economics**

- ☆ How much does it cost?
- ☆ If the customer spends more will it be a better product?
- ☆ What does it cost to use?
- ☆ Can it be used for many uses?

### **Services**

- ☆ How can the customer pay for it?
- ☆ What are the warranties / guarantees?
- ☆ Where can the customer get it repaired?
- ☆ Can it be delivered?
- ☆ Can the customer lay-by it?
- ☆ Can I get loyalty points?

Any one of the above questions can have a huge effect on the final decision to buy. It is important that as you ask the questions to determine their needs, you watch for those underlying needs.



The important thing to remember when presenting features of a product is that the features must be relevant to their needs.

Example:

Business owner, Harry, wants to buy several tablets for his staff to use when on the road.

The features that are relevant to Harry are:

- ☆ Durability
- ☆ Easy to use
- ☆ Long battery life
- ☆ Relevant software installed
- ☆ Large screen

The features that are irrelevant to Harry are:

- ☆ Latest trendy style
- ☆ Irrelevant “apps”
- ☆ Comes with a waterproof case for the beach

You will have identified Harry’s most important needs and should start with the features that satisfies those needs and proceed to work down the list of needs.

Only present irrelevant features that may add value to what he would already receive if he bought the tablets.

Example:

**Staff member** – “Your staff may attend meetings, so the phone feature on this tablet has an incoming call alert that vibrates rings, thereby not interrupting the meeting.”

A vibrating feature was not initially described as a need, however it may be a feature that Harry may consider.

An important rule is to avoid feature overload. Only provide information that is needed.



## SELLING BENEFITS

As a staff member describes the features, they need to explain how the specific feature will benefit the customer and the sales assistant needs to continue to remember they are there to satisfy particular needs.

The sales assistant should always try and avoid trying to sell the product through its features.

Examples:

**Staff member** – (*Feature*) “The battery life is 72 hours on this model of tablet, which means (*Benefit*) your staff will have enough battery life for a whole day’s work without worrying about it going flat.”

**Staff member** – (*Feature*) “This model has a built in screen brightness adjustment, (*Benefit*) so your staff can use the tablet outdoors.”

**Staff member** – (*Feature*) “The tablet is very durable and as the brochure shows, it can be dropped from a height of a metre without damaging the tablet. (*Benefit*) Your staff won’t have to worry about the tablet not working after the odd drop here and there as we all do.”

If the product can be demonstrated – then demonstrate it.

If the product can be tested by the customer then let them try it. Remember: customers shop with all their senses.



### **KEEPING PRODUCT INFORMATION UNDERSTANDABLE**

The staff need to keep their explanations, terms and descriptions simple and easy to understand. They need to avoid overly technical terms or industry jargon.

Staff members are encouraged to pitch the information at the level they feel the customer is comfortable with and simplify the language if they have trouble with overly technical or complicated descriptions.

Conversely, if the customer is technically competent, then the staff members could raise the level of the communication more to their understanding.

### **PRICING**

Aside from offering product information, staff members may be required to negotiate pricing. Many times a customer may ask for a discount if they buy two or more items, or the customer wants simply a better price than what the business is offering.

Staff members would need to refer to the policies or procedures of the business when it comes to price negotiations. It may be a policy that the manager of the business is the person who will negotiate any prices or at the very least, be the person who provides the final approval of any prices.

**Learning  
Activity**

## Task

**LEARNING ACTIVITY FIVE**

Below and on the next pages are four products.

Under each product you are to list three features and three benefits.

***Smartphone******Features***


***Benefits***


SAMPLE SAMPLE

***Tennis shoes******Features***


***Benefits***


***A wheelbarrow******Features***


***Benefits***


SAMPLE SAMPLE



***Knitting needles******Features***


***Benefits***


***TEACHER/TRAINER GUIDANCE NOTES***

Answers will vary and some of the products will stretch the student's or trainee's imagination.

However, the answers provided show some thought about the fact that all products will have features as well as benefits, no matter what the product is.



## IDENTIFY LIMITATIONS IN ADDRESSING CUSTOMER NEEDS AND SEEK APPROPRIATE ASSISTANCE FROM DESIGNATED INDIVIDUALS

There are products or services that could be considered technical, or products that are sold for specific uses or applications.

For example, some digital devices such as computers, smartphones or tablets have numerous technical features that required a staff member with a high level of technical knowledge about these products.

There are products that are sold for specific applications.

For example, there are many types of paints each formulated to be used for different application such as interior surfaces, exterior surfaces, wood stains and so on.

There are products that are sold for specific uses.

Examples of these products could include tools used by a tradesperson, kitchen appliances and so on.

A staff member may not have a sufficient level of product information to answer customer questions or adequately demonstrate or describe its use.

A staff member may not be sufficiently knowledgeable about finance options or technical services that the business provides.

In these instances, the customer should be referred to a qualified product or service specialist in the business.

## SAMPLE SAMPLE



For example, a person wants to paint some old outdoor furniture and needs to buy the best type of paint for the job.

The customer is referred to the paint product specialist in the store and the customer is provided information on the best type of paint to use.

A product specialist is a person who:

- ☆ Has a high level of technical and general product information
- ☆ Is able to confidently describe and/or demonstrate the products use
- ☆ Understands the features and the limitations of the product
- ☆ May have been trained by the product manufacturer
- ☆ May be a representative of the product manufacturer

Also, a product specialist could be a product category specialist as well.

In the paint example, this product specialist would have likely been a product category specialist able to provide information about paint, solvents, wall or surface preparation products and painting tools.

In cases where sales assistants are unable to assist a customer with certain product information, it may be better to refer them to a product specialist. Suggested steps include:

Explain to the customer that there is someone else in the store that is more experienced with the product and is better able to assist them.

Take them to this individual personally (if at all possible) and introduce the customer to the product specialist.

Provide the product specialist with any information previously gathered from the customer.

Give the customer confidence that the person they are now with can take care of their needs.

Thank them for their patience and bid them farewell.

**Learning  
Activity**

## Task

**LEARNING ACTIVITY SIX**

In this activity we want you to list ten products or services that you can think of that would require a product specialist to sell.


**TEACHER/TRAINER GUIDANCE NOTES**

This activity will get the student or trainee to think about the need for product specialists and why many businesses would have them.

The obvious products would be technical types products, however the products and services could include:

- ☆ Beauty products
- ☆ Health products
- ☆ Sporting equipment
- ☆ Gardening products
- ☆ Photography products
- ☆ Modern kitchen appliances
- ☆ Furniture
- ☆ Pet products
- ☆ Camping and fishing products
- ☆ Wedding or event products

**Learning  
Activity**

## Task

**LEARNING ACTIVITY SEVEN**

In this activity we want you to list six services that you can think of that would require a specialist by a business to sell.


**TEACHER/TRAINER GUIDANCE NOTES**

This activity will get the student or trainee to think about the need for service specialists and why many businesses would have them.

Some examples would be:

- 1) Travel services
- 2) Insurance products
- 3) Mobile telephone services
- 4) Entertainment services such as Foxtel, Netflix and so on
- 5) Gym trainers
- 6) Party or event organisers

# Section Two

## Deliver a Service to Customers

SAMPLE SAMPLE

# DELIVER AND MONITOR A SERVICE TO CUSTOMERS

## SECTION TWO – DELIVER A SERVICE TO CUSTOMERS

### INTRODUCTION

Customers have high expectations when it comes to quality customer service. And if those expectations are not met, they do have a tendency to complain.

In this section we look at what it means to provide quality customer service, including to those with special needs as well as how to handle those times when a customer has a complaint.

### SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Providing prompt service to customers
- ☆ Establishing and maintaining rapport with customers
- ☆ Sensitively and courteously handling customer complaints
- ☆ Providing assistance to customers with special needs
- ☆ Identify and use opportunities to promote and enhance services products to customers



## PROVIDE PROMPT SERVICE TO CUSTOMERS TO MEET IDENTIFIED NEEDS IN ACCORDANCE WITH ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

Only the customer can determine whether the business is offering quality service.

It is the management's responsibility to develop policies and procedures that ensure that the staff interacting with customers deliver what the customer would consider 'quality service'.

If the staff is aware of these policies and procedures and implement them in a friendly professional manner, then the business will develop and maintain a reputation for quality customer service.

### QUALITIES OF PROFESSIONALISM

To describe a person who is striving to be the best in his or her field is the same as describing a person striving to become a 'professional'.

What are the attributes or qualities of any professional?

- ☆ Developing the skills to become a professional
- ☆ Acquiring the knowledge needed
- ☆ Paying attention to detail
- ☆ A professional attitude
- ☆ Strong communication skills
- ☆ Willingness to continue to learn and develop new skills
- ☆ Responsible actions and responses within the working environment





## QUALITIES OF PROFESSIONALISM WHEN DEALING WITH CUSTOMERS

What are the attributes or qualities of professionals who deal with customers or clients?

- ☆ An understanding and an interest in the products being sold, including the features and benefits of these products
- ☆ The ability to provide proper and accurate information on products
- ☆ Strong communication skills
- ☆ The ability to resolve complaints
- ☆ A clear understanding of company policy and the ability to implement this policy
- ☆ The knowledge of the various roles and responsibilities of other staff

Displaying or communicating professionalism (especially to a customer) is evident not only in what we say, but also in how we say it and how we present ourselves to them.

This type of communication comes in verbal and non-verbal forms, including:

- ☆ Tone of voice
- ☆ Words used
- ☆ Gestures
- ☆ Posture
- ☆ Facial expression
- ☆ Personal appearance
- ☆ Personal grooming

Verbal and non-verbal communication skills are among the most important skills a professional can acquire.

SAMPLE SAMPLE



**Australian  
Competition &  
Consumer  
Commission**

### **CONSUMER LAWS RELATING TO PRODUCTS AND SERVICES**

The customer's needs and interests must come first in order to achieve customer satisfaction.

A customer cannot be offered just any product or service just for the sake of getting a sale.

In fact, there are numerous laws and regulations associated with the protection of a customer's rights.

These laws and regulations vary, depending on the type of product or services a customer is seeking or being offered.

However the main points of customer protection address:

- ☆ False or misleading information
- ☆ Product or service quality
- ☆ Warranties and Guarantees
- ☆ Product safety
- ☆ Returns or exchanges
- ☆ Financing contracts

The main source of information relating to customer protection legislation is the government agency called the "Australian Competition and Consumer Commission" or known as the "ACCC".

You should take the time to go to their website and do some research on the customer protection laws.

The main point that should be made is that all salespersons must provide accurate and relevant information to a customer based on their actual needs and requirements.

Not doing so could find you breaking the law.



### PROVIDING PROMPT SERVICE

Up to this point we have learned how to use questioning and listening skills to determine a customer's requirements and expectations.

We also learned that when determining a customer's requirements, it is important that you are aware of those non-verbal clues that the customer may be displaying.

Using those skills and the information you have gathered, you would likely have a good idea of a customer's requirements and this would be the time to take the customer to the products or to offer the services that align with those requirements.

In a retail store, the customer could be directed or taken to a display where specific merchandise that aligns with their requirements are located. The customer could be taken to a display where merchandise is located and offered a selection of products. It could be a large product displayed as "floor stock". If it is a product to be ordered such as a sofa, then the customer would be taken to the samples area to choose the style of sofa.

In a supply type operation, the customers orders would be processed in accordance with their needs. For example a company that sells timber to contractors would have identified what the contractor is needing and then write out the order and have the order processed and delivered inline with the contractor's expectations.

If it is a service being provided, then information about the service could be given to the customer. This could happen on the business's premises or over the telephone, email and other forms of communication.

It is important that once both you and the customer are satisfied that the needs and expectations of the customer are known, the business (or you) promptly begins to satisfy those needs and expectations.



You have identified the needs of the customer.

You have found a product or service that fits the customer's needs as well as expectations and provided the required information.

What now?

Many customer's just need a little time to reach their final purchase decision.

How much time depends on the customer.

Experienced salespersons know exactly when to close a sale and they close the sale with confidence.

Experience will show you that:

- ☆ If a customer has decided not to buy, there is nothing you can do about it.
- ☆ Customers will not be pressured into buying something they do not need.
- ☆ Customers will not listen to a whole sales presentation unless they were interested to begin with.
- ☆ Most customers expect (and are quite used to) having a salesperson request they purchase.

As an experienced sales person, you will need to develop skills to close a sale. A professional salesperson knows what to watch for in order to determine the **right time** to begin to close the sale.

Let's learn some of those techniques.



## BUYING SIGNALS

Buying signals are verbal and non-verbal signals given by the customer throughout the buying process. These signals can include questions, reactions and actions.

Let's look at each signal in detail.

**Questions** - The type of questions that a customer asks can give the salesperson a strong indication that the customer is ready to buy.

These questions can relate to specifics about the product or service such as:

***“Can I get this one in red?”***

***“Do you have all the timber in stock?”***

***“I need two insurance policies, one for the car and one for the house?”***

Questions to watch for can relate to payment terms or payment methods such as:

***“Can I lay-by the item?”***

***“Do you take American Express cards?”***

***“Do you have payment plans?”***

Also, questions on services that the business may provide such as:

***“If I take it now can I get a discount?”***

***“Can I get the timber delivered tomorrow?”***

***“If I buy the plane tickets can I get travel insurance from your office?”***

Any of the above questions can be a strong indication that the customer is ready to buy. This is what you want to listen for when communicating with the customer over the telephone.



**Reactions** - Reactions come in verbal and non-verbal forms. Verbal reactions come usually as answers to questions such as:

***“Yes, that’s what I was needing.”***

***“I didn’t know you could deliver so quickly. That’s good.”***

***“The insurance policy premiums are quite reasonable.”***

Non-verbal reactions are the facial expressions and gestures such as:

- ☆ Nodding in agreement as you speak.
- ☆ Smiling and showing interest.
- ☆ Focusing on the product being presented or on the information of a service being explained to them

**Actions** - You watch for what they do while going through your presentation such as:

- ☆ Trying out, touching, tasting or handling the product.
- ☆ Being involved in the demonstration.
- ☆ Taking the product from the display or from your hands.
- ☆ Taking the brochures, information sheets or forms from your hands



### CONCLUDING THE SALE

As you are picking up on the buying signals you will be trying to determine if this is the right time or not to begin the closing process.

Some of the signals seem strong enough but you are still unsure if the timing is right.

Experienced salespersons know that it is not **how** you close a sale; it is to know **when** to close the sale.

### TRAIL CLOSE

This would be a good time to do a 'trial close'. A trial close is another method of getting feedback from a customer, however in this case it is used to see whether they are ready to purchase the item. It takes skilful questioning.

Here some examples of questions you could use in a trial close:

***“Would you like me to see if I have the timber in stock?”***

***“Will you want the product delivered?”***

***“Is there any other features you would like to know about?”***

A trial close is to find out where the customer actually sits in the buying process – are they ready, or do they need more information?

Trial closes are best tried after the objections of the customer have been overcome.

If you get a positive response to a trial close then it would be time to begin to close the sale.





Closing the sale is simply asking the customer to decide whether or not they wish to buy the product or service at this time. You would have decided the timing is right by observing the buying signals so it would require you to take the initiative and ask the customer what their decision is.

Experienced salespersons have fine-tuned their techniques over time. All closing techniques are based on closed ended questions requiring only a 'yes' or a 'no' answer. To get you started, here are some questions that could be asked as suggestions:

***“Shall I complete an order form for you?” or “Shall we go to the desk and arrange payment?”***

If they are deciding between two alternatives, you can ask:

***“Would you like the red one or the blue one?” or “Do you want to book the service for Tuesday or is Wednesday better?”***

Sometimes a purchase will be made if you offer additional value-added service or the customer has made the purchase conditional on something. You could start the closing process by asking:

***“If I can get the discount you wanted you will you buy the timber today?” or “Will you go ahead with the order if I can guarantee that you can have it delivered by tomorrow as you wanted?”***

The techniques used should be a seamless extension to the selling process and feel natural to both you and the customer. This will be accomplished if the time is right; you choose your questions carefully and remain confident and relaxed throughout the process.

Once the sale has been successfully concluded, the customer must be left with feeling satisfied with the purchase and a good impression of you and the business.

Always thank the customer for their purchase. Give them confidence that they have made the right decision by making positive comments about their purchase.



**Learning  
Activity**

## Question

**LEARNING ACTIVITY ONE**

What are the seven qualities of a professional?


SAMPLE SAMPLE

**TEACHER/TRAINER GUIDANCE NOTES**

- 1) Developing the skills to become a professional
- 2) Acquiring the knowledge needed
- 3) Paying attention to detail
- 4) A professional attitude
- 5) Strong communication skills
- 6) Willingness to continue to learn and develop new skills
- 7) Responsible actions and responses within the working environment

**Learning  
Activity**

Question

**LEARNING ACTIVITY TWO**

What are the six qualities of a professional sales person?


SAMPLE SAMPLE

**TEACHER/TRAINER GUIDANCE NOTES**

- 1) An understanding and an interest in the products being sold, including the features and benefits of these products
- 2) The ability to provide proper and accurate information on products
- 3) Strong communication skills
- 4) The ability to resolve complaints
- 5) A clear understanding of company policy and the ability to implement this policy
- 6) The knowledge of the various roles and responsibilities of other staff

**Learning  
Activity**

## Task

**LEARNING ACTIVITY THREE**

Below are some scenarios.

Tell us what a staff member would do next in order to start the sales process once they have an understanding of the customer's requirements.

***Customer interested in a Foxtel plan.***

***Customer wants a new cordless drill***

***A contractor is building a new house and is interested in purchasing some timber***

***Customer interested in life insurance policy***

SAMPLE SAMPLE

**TEACHER/TRAINER GUIDANCE NOTES**

The student or trainee should be reminded that the next step is the start of the sales process and their answers should not reflect any selling steps as yet.

**Customer interested in a Foxtel plan.** (Staff member would provide Foxtel information to review)

**Customer wants a new cordless drill.** (Staff member would take the customer to the cordless drill display and unlock the drill they have an interest in so that they can handle the drill)

**A contractor is building a new house and is interested in purchasing some timber.** (Staff member would provide the contractor with pricing, availability and delivery information)

**Customer interested in a pair of Adidas runners.** (Staff member would provide the insurance policy information, requirements and forms)

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FOUR**

A professional experienced salesperson will watch for the customer's buying signals.

What are the three types of buying signals?


**TEACHER/TRAINER GUIDANCE NOTES**

**Questions** customers ask  
Their **reactions** during the selling processes  
Their **actions** as the selling process is nearing its end

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FIVE**

Why is a **trial close** often used and when should a **trial close** be used?

**TEACHER/TRAINER GUIDANCE NOTES**

A trial close is to find out where the customer actually sits in the buying process – are they ready, or do they need more information?

Trial closes are best tried after the objections of the customer have been overcome.

SAMPLE SAMPLE



**Learning  
Activity**

## Question

**LEARNING ACTIVITY SIX**

Experienced salespersons start their closing of the sale doing what?

***TEACHER/TRAINER GUIDANCE NOTES***

Experienced salespersons have fine-tuned their techniques over time. All closing techniques are based on closed ended questions requiring only a 'yes' or a 'no' answer

**Learning  
Activity**

## Question

**LEARNING ACTIVITY SEVEN**

What are the six main areas that customer protection laws cover?


**TEACHER/TRAINER GUIDANCE NOTES**

The six main points of customer protection address:

- 1) False or misleading information
- 2) Product or service quality
- 3) Warranties and Guarantees
- 4) Product safety
- 5) Returns or exchanges
- 6) Financing contracts



## ESTABLISH AND MAINTAIN APPROPRIATE RAPPORT WITH CUSTOMERS TO ENSURE COMPLETION OF QUALITY SERVICE DELIVERY

Building rapport with your customers is one of the most important skills that you can develop as a sales professional.

To establish rapport you need to effectively use a combination of communication skills; both verbal and non-verbal.

Building rapport started the minute you approached the customer.

Focus on your appearance and grooming. It is very difficult to establish a rapport with a customer if the first impressions of you are negative.

A smile on your face and quick “Hello” and “How are you today?” breaks the ice and reduces the tension associated with meeting someone for the first time.

A little “small talk” works well as long as it is a safe topic, such as the weather or about an up-and-coming holiday weekend and so on.

Your tone of voice should be relaxed and friendly.

A little humour helps but keep it clean. Joking about yourself is a good way to get the customer to smile, even laugh.



Body language is very important. Look relaxed, try and maintain reasonable eye contact (without staring) and lean slightly toward the customer.

This type of body language shows you are friendly and interested in what they are saying.

If there is a mismatch between what we are saying verbally and what our body language is saying then the person we are communicating with will believe the body language. Building rapport, therefore, begins with displaying appropriate body language - being welcoming, relaxed and open.

Another technique is to try and use their name. The first hurdle is to get their name. Most people have no problem offering their first name.

After some small chit chat, you would offer your name and then ask for theirs.

This opening session of building rapport often only lasts for a minute or two.



The next step in building a rapport with the customer is to express a genuine interest in assisting them.

Some simple questions will start to reveal how you can show this genuine interest in helping them.

Listen and show empathy in what they are saying. Empathy is the ability to share another person's feelings. It is the ability to share in their emotional experience.

This helps in gaining a greater understanding of the customer's needs from their viewpoint.

Sometimes you may think customer's requests, questions or needs are 'silly', 'different', or 'difficult'. It is important that you do not embarrass the customer with your response.

Customers made to feel foolish are much less inclined to buy your product and discouraged even more from returning to your business.

As the rapport builds, customer's body language and verbal communication will soon show that they are far more comfortable with the interaction and at this point the clarification of their needs can begin.

### **BENEFITS OF BUILDING A RAPPORT WITH CUSTOMERS**

The first benefit is that having a rapport with a customer means they trust you.

As a representative of the business, you have built up the reputation of the business and this can only mean more sales revenue.

A customer that trusts the sales staff will more than likely be a return customer.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY EIGHT**

What is the meaning of the word “rapport”?

***TEACHER/TRAINER GUIDANCE NOTES***

Rapport is a close and harmonious relationship in which the people or groups concerned understand each other's feelings or ideas and communicate well.

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY NINE**

What is the meaning of the term “small talk”?

***TEACHER/TRAINER GUIDANCE NOTES***

Small talk is polite conversation about unimportant or uncontroversial matters, especially as engaged in on social occasions.

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY TEN**

What is the meaning of the word “empathy”?

**TEACHER/TRAINER GUIDANCE NOTES**

*Empathy* is the capacity to understand or feel what another person is experiencing from within the other person's frame of reference, in other words, the capacity to place oneself in another's shoes.

SAMPLE SAMPLE



**Learning  
Activity**

## Question

**LEARNING ACTIVITY ELEVEN**

What is the meaning of the term “body language”?

***TEACHER/TRAINER GUIDANCE NOTES***

Body language is a kind of nonverbal communication, where thoughts, intentions, or feelings are expressed by physical behaviours, such as facial expressions, body posture, gestures, eye movement, touch and the use of space.

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY TWELVE**

When a sales person has developed a rapport with the customer what feelings will a customer have toward the salesperson?

***TEACHER/TRAINER GUIDANCE NOTES***

The customer who has a rapport with a sales person will trust the salesperson and have confidence in the salesperson.

SAMPLE SAMPLE



## **SENSITIVELY AND COURTEOUSLY HANDLE CUSTOMER COMPLAINTS IN ACCORDANCE WITH ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS**

There are two types of complaints:

- 1) Product Complaints (those related to a product or products)
- 2) Service Complaints (those related to customer service)

Product complaints often relate to:

- ☆ Quality
- ☆ Damage/faults
- ☆ Availability
- ☆ Pricing
- ☆ 'False' advertising (products advertised are sold out)
- ☆ Limited amount of products on display

Service complaints often relate to:

- ☆ Rude/inattentive staff
- ☆ Inefficient service
- ☆ Broken promises
- ☆ Errors in prices charged
- ☆ Lack of product knowledge
- ☆ Incorrect advice

SAMPLE SAMPLE



The business, including its policies and procedures, needs to effectively demonstrate its desire to offer the highest levels of quality service and customer satisfaction.

This would require you, as a staff member, to impart to the customer that if any problems or complaints should arise, they should be brought to the business's attention immediately for resolution. Problems can only be solved and later prevented, if the business knows about them.

It is a known fact that many customers with complaints have had them resolved to their satisfaction, and later returned to continue to do business.

Complaints also give the business management the opportunity to identify problems with products, service, or staff. This allows the management to address these problems promptly, in turn preventing future occurrences.

The initial response to a complaint is very important.

It is essential that you demonstrate to the customer that you are willing and ready to immediately address their complaint and that you desire their satisfaction.

The key attributes when addressing a customer's complaint are:

- ☆ **Attentive** listening
- ☆ **Sincere** and careful questioning to understand the complaint
- ☆ **Sympathy** towards them and their situation
- ☆ **Honesty** in your responses
- ☆ **Genuine** desire to resolve the problem



## HANDLING CUSTOMERS WITH COMPLAINTS

As mentioned previously, it is important to establish the facts within the complaint as quickly as possible in order to effectively resolve the problem.

Recommended steps that can assist you in establishing the facts while dealing with potential emotional elements of the complaint could include:

- 1) Listening attentively to the customer
- 2) Calming the customer, sympathising with them, while searching for the facts through questioning
- 3) Apologising for any inconvenience/stress, and declaring that you intend to resolve it
- 4) After gathering all the information possible, deciding on a course of action
- 5) Following up on the process until the customer is satisfied

At this point it is important that you are not drawn into the complaint emotionally, especially at the beginning stages.

The complaining customer may try to blame you for the situation, so it is important that you do not take any complaints personally and approach each one objectively.



## CUSTOMER EXPECTATIONS

What the customer expects from a business is to be satisfied with the product or service, so when a customer complains, then it is clear that they have not been satisfied.

It is at this point that the business's image and reputation is at stake. It is equally important that the customer is not only satisfied with the outcome of their complaint, but enough to become a loyal, repeat customer.

Here are a few ideas that should be considered when dealing with complaints:

- ☆ Know what your level of authority allows you to do when dealing with customer complaints
- ☆ Immediately show the customer that you are intent on solving their complaint as most customers with problems expect a fight, so, when this is not the case, they immediately become easier to deal with
- ☆ Surprise the customer with how quickly you and the business can resolve their problem
- ☆ Get the customer as comfortable as possible by offering them refreshments or reading materials while they are waiting
- ☆ If appropriate, offer a small complimentary gift, discount or additional services to make up for any inconvenience
- ☆ If at all possible, follow up with the customer through a phone call to see if everything is satisfactory, or send a small note apologising for any inconvenience

A few outstanding or surprising gestures when resolving customer complaints will not only satisfy the customer, but more likely have them return to your company for more business.

A business that has had a customer's complaint efficiently resolved to their satisfaction can expect the following outcomes.

- 1) Protection of good reputation
- 2) Goodwill of customer maintained
- 3) Loyalty of customer retained



## REFUNDS AND RETURNS

Many businesses especially smaller operations, are uncertain as to their rights and obligations in the area of exchanges and/or refunds and they frequently find themselves having problems with their customers - simply because sometimes neither the business nor the customer know their rights.

The Australian Competition and Consumer Commission (ACCC) administer consumer protection laws and these include the rights of customer relating to product returns, exchanges and/or refunds.

Also each state and territory would administer consumer protection laws through their "Fair Trading" departments.

Most issues, problems or complaints relating to products result either in the exchange/return of the product, replacement with another product or a total refund.

To start with, no business is allowed by consumer laws to display a sign that says... "No Refunds".

Then the business's policies and procedures as well as industry regulations and codes are what staff would need to follow when processing an exchange/return of product or refund. The policy regarding returns should be displayed prominently at the business and must be in line with consumer rights.

Most customers are genuine in their complaint.

So the entire process should be efficient, friendly, helpful and hassle free in the eyes of the customer.



However, there may be those attempting to refund items bought from other businesses or retailers, pass stolen or damaged goods that may have voided the warranty, or used the products for something other than what they were designed to do.

In these cases the rights revert back to the business.

If a staff member is suspicious with the reasons relating to the return or they feel the customer is not genuine in their attempt to secure a refund, they should advise their supervisor or the manager of their concerns and either get assistance or further instructions on how to settle the matter.

In many cases, it is the manager or supervisor that has the final approval when it comes to an exchange or return and refund of merchandise.

There will be documentation required and the processing of this documentation will be governed by business procedure. The accuracy of the documentation will rely on the staff's ability to gather and record the facts relating to the complaint. The transaction will have to be recorded as per the business's policies and procedures.

Any staff that processes exchanges or refunds, would need to take the time to learn the policies of the business, industry codes, consumer rights and the processing of the refunds or exchanges.



**Learning  
Activity**

## Question

**LEARNING ACTIVITY THIRTEEN**

What do product complaints often relate to?

**TEACHER/TRAINER GUIDANCE NOTES**

Product complaints often relate to:

- ☆ Quality
- ☆ Damage/faults
- ☆ Availability
- ☆ Pricing
- ☆ 'False' advertising (products advertised are sold out)
- ☆ Limited amount of products on display

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FOURTEEN**

What do service complaints often relate to?

**TEACHER/TRAINER GUIDANCE NOTES**

Service complaints often relate to:

- ☆ Rude/inattentive staff
- ☆ Inefficient service
- ☆ Broken promises
- ☆ Errors in prices charged
- ☆ Lack of product knowledge
- ☆ Incorrect advice

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FIFTEEN**

What were the five recommended steps that can assist you in establishing the facts while dealing with potential emotional elements of the complaint?


**TEACHER/TRAINER GUIDANCE NOTES**

Recommended steps that can assist you in establishing the facts while dealing with potential emotional elements of the complaint could include:

- 1) Listening attentively to the customer (using active listening skills)
- 2) Calming the customer, sympathising with them, while searching for the facts through questioning
- 3) Apologising for any inconvenience/stress, and declaring that you intend to resolve it
- 4) After gathering all the information possible, deciding on a course of action
- 5) Following up on the process until the customer is satisfied

**Learning  
Activity**

## Research

**LEARNING ACTIVITY SIXTEEN**

Every state and territory in Australia has a Consumer Affairs and Fair Trading Department.

These departments are the main locations where consumers go to when they have a complaint with a business they have not been able to resolve.

In this activity we want you to do some research and list the names and contact details of each state and territory Consumer Affairs and Fair Trading Departments.

***Northern Territories******Western Australia***

SAMPLE SAMPLE

***South Australia******Victoria******Tasmania******Australian Capital Territory***

SAMPLE SAMPLE

***New South Wales******Queensland******TEACHER/TRAINER GUIDANCE NOTES***

This activity should be kept and used for references.

The contact details are readily available on the internet.

We have not listed the contact details as many change with the change of governments.

You as the teacher or trainer should cross-reference the student's or trainee's submissions with the current information available.



## PROVIDE ASSISTANCE OR RESPOND TO CUSTOMERS WITH SPECIFIC NEEDS ACCORDING TO ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

Most people find dealing with customers with special needs somewhat uncomfortable and feel unsure of how to approach or communicate with this type of customer.

Most of this discomfort or uneasiness stems from fear or uncertainty, due to the lack of experience associated with servicing this type of customer.

There also is a tendency to be influenced by misinformation, prejudice or generalisation / stereotyping. Take the time to learn more about customers with special needs.

All staff has the responsibility to treat all customers/clients with the same level of respect and quality of service.

Examples of customers that may have special needs include:

- ☆ Older customers
- ☆ Customer with limited English skills
- ☆ Intellectually disabled
- ☆ Physically disabled
- ☆ Hearing impaired
- ☆ Blind or sight impaired



Although it is often easy to identify customers with special needs entering the business premises through observation, sometimes it is not immediately apparent that a customer is one that has special needs.

In those cases, careful and sensitive questioning would be required.

By questioning it will become apparent that:

- ☆ The customer has limited English skills
- ☆ The customer may be hard of hearing or deaf
- ☆ The customer is slightly intellectually disabled

Once the staff has established the special needs of a customer, they are then able to assist them better.

SAMPLE SAMPLE





Serving a customer with special needs should be no different than serving any another customer.

- ☆ You greet them and make them feel welcome
- ☆ Identify their needs
- ☆ Meet their needs
- ☆ Make a sale
- ☆ Thank them for their patronage and invite them back
- ☆ Bid them farewell

There may be special services, features at the place of business or staff members that are experienced or better able to service a disabled customer, or a customer with special needs.

This could include:

- ☆ Wheelchair access
- ☆ Disabled toilets
- ☆ Special products
- ☆ Staff member with language skills
- ☆ Staff member with more experience with disabled customers

As with any other customer, determine whether you have the experience, knowledge and/or authority to handle the needs of a customer with special needs. If not, it would be advisable to refer the customer to the most appropriate person in the operation.



### **CUSTOMERS IN WHEELCHAIRS**

Speaking with customers in wheelchairs makes communication unequal due to the height differences - making the standing person in a more dominant position, forcing them to 'talk down' to the customer.

It is recommended when speaking with a person in a wheelchair that you pull up a stool, squat, or sit on a box or step. This creates a far more equal conversation situation and it is likely the person in the wheelchair will converse much more freely.

A situation may arise when a person in a wheelchair approaches a sales counter or desk. Instead of speaking over top and down to the customer, come out from behind and offer your assistance.

Once you have established their needs, continue to offer your assistance in finding and/or accessing the desired products or services.



### BLIND OR VISION IMPAIRED CUSTOMERS

A vision impaired/blind customer will usually rely on you to approach them and offer assistance.

It is important to offer this assistance as quickly as possible. They will become increasingly uneasy if left waiting too long. Your tone of voice and listening skills are very important.

Here are some recommended steps when assisting a customer that is blind or vision impaired:

- ☆ Greet them in a friendly and enthusiastic manner (some people have a habit of shouting at blind persons; use a normal tone of voice)
- ☆ Give them your name and tell them where they are standing
- ☆ Ask them how you can assist them
- ☆ Once you have established their needs, ask them how they prefer to be guided
- ☆ Guide them to the section where the products are located or to a desk where you can continue on with a sale
- ☆ Describe each product or service in detail
- ☆ Thank them for their patronage
- ☆ Guide them to the entrance
- ☆ Bid them farewell



### DEAF OR HEARING IMPAIRED CUSTOMERS

If you are aware that a customer has a hearing impairment, it is important to establish contact and get their attention.

Face them directly and maintain eye contact.

Hearing impaired customers will usually have some level of hearing and can read your lips and deaf customers are usually skilled at 'lip reading'.

It is important you speak naturally and clearly – do not mumble, yell or exaggerate your facial and lip movements.

Keep your sentences short and simple. Be careful that the way you speak is not childish or demeaning.

Pointing while speaking to products, prices or parts of a brochure may assist you in identifying their needs.

Sometimes using a notepad will help the communication along if you see the customer has difficulty understanding.

If the customer has a companion assisting in the communication always respond directly to the customer.

And most importantly – be patient.



### **INTELLECTUALLY DISABLED CUSTOMERS**

Intellectually disabled customers may or may not also have physical disabilities. When conversing with intellectually disabled customers use a natural tone of voice in a friendly and courteous manner.

Avoid sounding childish or demeaning.

Avoid trying too hard to please, or trying to become 'friends', as this will look false and forced. Be courteous in your mannerisms and as helpful as you would be with any other customer. Be yourself.

Customers with an intellectual disability may require more time. Therefore, the other quality you will have to develop is patience. It helps to fully understand their needs – again as with any other customer – so use your communication skills and ask questions to clarify and confirm their needs.

If you feel you now understand their needs, draw the customer into the process by making suggestions of your own in order to satisfy those needs.

### **CUSTOMERS WITH SPEECH DIFFICULTIES**

As with the intellectually disabled customer, those with speech difficulties require patience on your part.

There will be times when it is hard to understand what the customer is saying and it is important you do not pretend you understand. Ask them to repeat what they have just said and repeat it back to them so both you and the customer are comfortable the communication is leading the same way.

It is important that you do not try and rush the customer. If they speak slowly avoid finishing off their sentences for them. It is likely that if they are feeling pressured the communication process will become even more difficult.

There is no need for you to also speak slowly. Again be yourself and speak normally using a natural tone of voice in a friendly and courteous manner.

Provide the quality service in the way you would as with any other customer.



### CUSTOMERS WITH LANGUAGE DIFFICULTIES

In a multi-cultural society such as Australia it is likely a customer that has difficulty in speaking and understanding English will eventually require your assistance.

The first question that you must ask is; do they speak any English at all? Do this politely. Make them feel welcome by smiling, being patient and helpful. Be aware they will be watching your mannerisms, tone of voice and facial expressions as much as trying to understand your words. Your mannerisms, tone of voice and facial expressions must convey your willingness to assist them. In these cases it pays to speak slower and more deliberate.

For those customers not fluent in English, it is suggested you use common English words in simple short sentences. Use open-ended questions to establish their needs.

Examples of simple open-ended questions:

- ☆ How many do you want?
- ☆ What colour?
- ☆ What size are you?

Keep attempting to get feedback from the customer. Use closed ended questions that require simple answers such as yes or no.

Examples of simple closed ended questions

- ☆ Is this the colour?
- ☆ Does that fit?
- ☆ Do you like this one?



You should use more gestures and body language such as pointing at the products showing price tags, using hand gestures to show numbers, amounts and so on.

Sometimes simple sketches or drawings can help you understand the needs of the customer and assist in the communication process.

If the customer does not speak or understand English at all, it may be necessary to enlist the help of a translator. Try and find out what language the customer does converse in and see if there is someone in the office or store who speaks that language.

Customers that use English as their second language may at times sound rude or arrogant.

Persons from other cultures use words differently and this sometimes leads to a message being misunderstood. They are not knowledgeable or experienced in the use of local terminology or colloquialisms.

A person using English as their primary language often makes requests that are softened with words such as 'please', 'thank you' or 'sorry'. However, a person that uses English as their second language often has their requests sound like rude demands.

This is not intentional and should not be taken as being rude.

Examples:

Could I please have a look at this model? ***I want to look at this one.***

Would you have two more in this colour? ***I need two more blue ones.***

May I speak with the manager please? ***I want to speak to the manager.***

As always be polite, patient and concentrate on being a sales professional. Offer the same quality service as you would to any other customer.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY SEVENTEEN**

What should a staff member not do when interacting with a customer that has speech difficulties?

***TEACHER/TRAINER GUIDANCE NOTES***

It is important that you do not try and rush the customer. If they speak slowly, avoid finishing off their sentences for them.

SAMPLE SAMPLE



**Learning  
Activity**

## Question

**LEARNING ACTIVITY EIGHTEEN**

What is important when a staff member is interacting with a customer that has hearing difficulties or deafness?

***TEACHER/TRAINER GUIDANCE NOTES***

It is important you speak naturally and clearly – do not mumble, yell or exaggerate your facial and lip movements.

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY NINETEEN**

People with language difficulties will likely be doing what when interacting with a staff member?

***TEACHER/TRAINER GUIDANCE NOTES***

They will be watching your mannerisms, tone of voice and facial expressions as much as trying to understand your words. Your mannerisms, tone of voice and facial expressions must convey your willingness to assist them.

SAMPLE SAMPLE



## IDENTIFY AND USE AVAILABLE OPPORTUNITIES TO PROMOTE AND ENHANCE SERVICES AND PRODUCTS TO CUSTOMERS

Customers generally remember their purchasing experience by the service they received.

The business wants the customer to remember the experience, not just from receiving merely good service, but outstanding service. This will give the business the competitive edge and dramatically increase the chances of having this customer return and even have them recommending the business to others.

The simplest way that a staff member can go from offering good service to offering excellent service is by exceeding the expectations of the customer.

Examples of exceeding the expectations of a customer often include:

- ☆ Let the customer try the product
- ☆ Provide samples
- ☆ Offer free, same day delivery
- ☆ Throw in a 'freebie'
- ☆ Give the customer a small, unexpected price discount
- ☆ Upgrade the product with an extra cost
- ☆ Show how the product can be used for other purposes or in different ways, thereby increasing the value of the product
- ☆ Illustrate the best ways to prolong the life of their product, through cleaning, maintenance, etc. (Giving them this extra information will show your knowledge of the product and pass it on to them)
- ☆ Follow up after the sale

The same holds true with providing services. For example, many car dealers will wash their customer's cars after servicing them at no costs. A real estate agent often sends flowers and wine to a new home buyer as a house warming gift. A travel agent often provides vouchers for free food and entertainment at the resort the customers have booked into.

It is OK to offer good service but it is far better to offer outstanding service beyond what the customer may have expected.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY TWENTY**

We mentioned nine ways that sales staff could use to exceed the expectations of a customer.

What were those nine ways?


SAMPLE SAMPLE

**TEACHER/TRAINER GUIDANCE NOTES**

Examples of exceeding the expectations of a customer often include:

- 1) Let the customer try the product
- 2) Provide samples
- 3) Offer free, same day delivery
- 4) Throw in a 'freebie'
- 5) Give the customer a small, unexpected price discount
- 6) Upgrade the product with an extra cost
- 7) Show how the product can be used for other purposes, or in different ways
- 8) Illustrate the best ways to prolong the life of their product
- 9) Follow up after the sale

**Learning  
Activity**

## Interview

**LEARNING ACTIVITY TWENTY ONE**

In this activity you are to interview six people and ask each one to describe a time when they were surprised at the high level of customer service which was something they were not expecting. Give us their first name, age and genders and a description of their experience. Ask them if they would go back (or did they go back) to the business and would they or have they recommended the business to others.

**Person 1 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**Person 2 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**Person 3 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**Person 4 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**Person 5 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**Person 6 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***How their customer service expectations were exceeded***

**TEACHER/TRAINER GUIDANCE NOTES**

This activity will expose the student or trainee to how some people react to exceeding high quality customer service and how this could affect a business.

SAMPLE SAMPLE



# Section Three

## Monitor and Report on Service Delivery

SAMPLE SAMPLE

# DELIVER AND MONITOR A SERVICE TO CUSTOMERS

## SECTION THREE – MONITOR AND REPORT ON SERVICE DELIVERY

### INTRODUCTION

All successful businesses regularly monitor their customer service levels and how the customer feels about the quality of their customer service, their products and their services. This is the only way that a business will know if their needs to be improvements made.

In this section we look at how businesses can effectively monitor their customer service levels and how they can effectively use what customers think in order to make improvements.

### SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Reviewing customer satisfaction using available evidence
- ☆ Identifying opportunities to enhance quality of products and services to customers
- ☆ Monitoring service delivery quality and effectiveness
- ☆ Regularly seek customer feedback
- ☆ Ensuring customer service reports are clear, concise and accurate
- ☆ Preparing customer service report that contain recommendations on improving customer service



## REGULARLY REVIEW CUSTOMER SATISFACTION WITH SERVICE DELIVERY USING VERIFIABLE EVIDENCE ACCORDING TO ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

All successful businesses will regularly review their customer service quality based on information gathered internally and information available to them from external sources.

To have a clear and accurate picture of how the business is doing in regards customer satisfaction they need to use information that is current and can be verified as being accurate.

A common practice is reviewing internal data that could include:

- ☆ Documented customer complaints
- ☆ Product returns and/or refunds
- ☆ Lost sales reports
- ☆ A fall in customer numbers
- ☆ Product warranty claims
- ☆ Settled legal actions with customers/clients

This information would give a clear picture on where the business needs to focus on in order to retain customers and maintain a reputation of providing high quality customer service.

In businesses that are more service oriented such as medical operations, professional services (legal, accounting, etc.), clients records would reveal any issues with the business meeting the client's expectations of quality service provision.

What needs to be avoided is information that is based on opinions or other points of view. This type of information should only be used to support verifiable evidence of customer service level issues.



## EXTERNAL INFORMATION

Many businesses will approach their customers and ask them to fill in a survey form. It will ask the customers a series of questions that when answered will give the business a clearer understanding on how customers feel about the level of customer service the business is providing.

Because this information is coming directly from the customer or client, it is considered a viable and verifiable type of information on which a decision can be made as to customer service improvements.

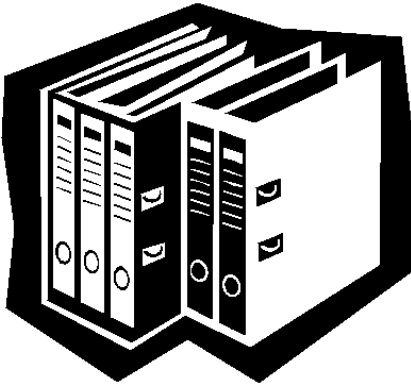
Other external sources could include:

- ☆ Articles about the company in newspapers or magazines
- ☆ Independent reviews
- ☆ Unsolicited customer feedback by way of mail, emails or assessing the company's website feedback pages
- ☆ Social media
- ☆ Feedback from suppliers and professional service providers to the company such as the company's accountants

Larger organisations often use research companies to gather information from the broader community and find out what the community thinks about the type of customer service the company is providing. Examples of who would use research companies would include:

- ☆ Telephone service providers
- ☆ Utility companies (electricity, gas, water, etc.)
- ☆ Insurance companies
- ☆ Banks and other financial institutions
- ☆ Airlines
- ☆ Governmental agencies
- ☆ Large retailers

The benefit of this type of research is that the company not only gets information about the customer service level, but they also get a feel of what the broader community's perception is of their customer service provision.



## ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

There would be some organisational requirements that would need to be understood and followed. These requirements would likely include:

- ☆ Who is authorised to access internal information and data
- ☆ Maintaining the security of internal information and data
- ☆ The methods of filing and storing internal and externally sourced information and data
- ☆ Complying with copyright, consumer rights and privacy laws relating to the use of internal and external information and data
- ☆ Complying with the company's confidentiality policies relating to the use of internal and external information and data

Most of the internal and external information and data would be commercially sensitive and highly confidential so the organisational requirements, including all the relevant policies and procedures would need to be fully understood and followed.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY ONE**

To have a clear and accurate picture of how the business is doing in regards customer satisfaction a business needs to use information that is current and can be verified as being accurate. A common practice is reviewing **internal** data that could include what six types of information or data?


**TEACHER / TRAINER GUIDANCE NOTES**

- 1) Documented customer complaints
- 2) Product returns and/or refunds
- 3) Lost sales reports
- 4) A fall in customer numbers
- 5) Product warranty claims
- 6) Settled legal actions with customers/clients

SAMPLE

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY TWO**

To have a clear and accurate picture of how the business is doing in regards customer satisfaction a business needs to use information that is current and can be verified as being accurate. A common practice is reviewing **external** information that could include what six types of information or data?


**TEACHER / TRAINER GUIDANCE NOTES**

- 1) Customer feedback
- 2) Articles about the company
- 3) Independent reviews
- 4) Unsolicited customer feedback
- 5) Social media
- 6) Feedback from suppliers and professional service providers

SAMPLE

SAMPLE SAMPLE



## IDENTIFY OPPORTUNITIES TO ENHANCE THE QUALITY OF SERVICE AND PRODUCTS, AND PURSUE WITHIN ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

On the previous pages we reviewed the methods of collecting information and data relating to the business's customer service levels and products and the need to ensure that any future decisions made on improving customer service and products are based on verifiable evidence.

Once the information and data has been collected and organised, it needs to be assessed.

If you were requested to review the information and data, you would no doubt see areas where the businesses customer service as well as products or services on offer could be improved.

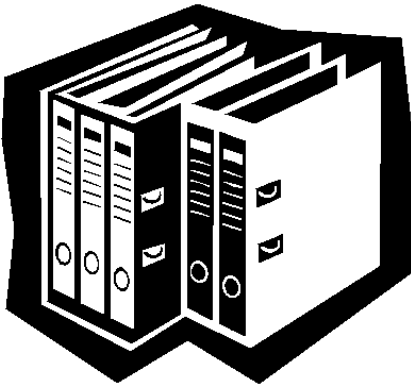
It is good to remember that in today's competitive business environment, not only does poor customer service and inferior products need to be improved, but there are also many opportunities for 'good' customer service and 'good' quality products to be enhanced.

Having an attitude of constant improvement will always keep the business one step ahead of the competition.

Here are examples of opportunities to enhance the quality of the service and products of the company:

- ☆ You could increase your product and service knowledge so that you can better service a customers needs
- ☆ You could take professional sales training to better interact with customers
- ☆ The business could replace inferior products with higher quality products
- ☆ Work closer with suppliers to increase delivery response time
- ☆ In conjunction with suppliers, the business could offer better pricing options
- ☆ Follow up with customers post sale to ensure they are satisfied with their purchase or the services provided
- ☆ Work as a team to improve the quality of the service and products of the company
- ☆ Offer more of a personalised customer service which makes customers feel special
- ☆ Frequently contact your customers using a variety of communication methods
- ☆ Reward staff for providing quality customer service and suggestions for product improvement
- ☆ Over compensate a customer who has a product or service problem or complaint





## ORGANISATIONAL AND LEGISLATIVE REQUIREMENTS

There would be some organisational requirements that would need to be understood and followed when considering the many possible opportunities to enhance the quality of the service and products of the company . These requirements would likely include:

- ☆ Your level of authority to make significant changes to the way you and other staff interact with customers
- ☆ Requirements that relate to discounting
- ☆ Requirements that relate to refunds and returns, including any laws and regulations associated with refunds and returns

Organisational requirements are put in place to protect the viability of the business and ensure the business complies with any applicable laws and regulations so the organisational requirements, including all the relevant policies and procedures would need to be fully understand and followed.

**Learning  
Activity**

## Interview

**LEARNING ACTIVITY THREE**

In this activity you are to interview six people and ask each to describe a business they had dealt with where they thought the business could have improved in their customer service. Any type of business is OK, except avoid café's or restaurants. Give us their first name, age and genders. Tell us the type of business it was, the product or service they provided and what your interviewee thought needing improving relating to their customer service and a description of their experience. Ask them if they would go back (or did they go back) to the business as well as would they, or have they recommended the business to others?

**Person 1 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**Person 2 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**Person 3 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**Person 4 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**Person 5 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**Person 6 First Name** \_\_\_\_\_ **Age and Gender** \_\_\_\_\_

***The description of the business and customer service improvements needed***

**TEACHER/TRAINER GUIDANCE NOTES**

This activity will expose the student or trainee to how some people notice that improvements to a business's customer service could be done.

SAMPLE SAMPLE

**Learning  
Activity**

## Research

**LEARNING ACTIVITY FOUR**

This is a three part activity.

The first part of this activity we want you to locate two sales training organisations that offer sales training at an on site business environment. Tell us their name, where they are located and what basic training they offer.

***Training organisation 1 (In house training)******Training organisation 2 (In house training)***

SAMPLE SAMPLE

The second part of this activity we want you to locate two sales training organisations that offer sales training at their own premises. Tell us their name, where they are located and what basic training they offer. They need to be different from the business you located in part one of this activity)

***Training organisation 1 (Outside training)***

***Training organisation 2 (Outside training)***

The second part of this activity we want you to locate two sales training organisations that offer online sales training. Tell us their name, where they are located and what basic training they offer online. They need to be different from the business you located in part one and two of this activity)

***Training organisation 1 (Online training)***

***Training organisation 2 (Online training)***

***TEACHER/TRAINER GUIDANCE NOTES***

This activity will expose the student or trainee to the many types of sales training organisations in Australia as well as how sales training can be undertaken.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY FIVE**

There are some businesses that collect details on their customers that include their birthdays, anniversaries and so on. These businesses many times contact their customers by sending them a card and along with a card a special offer in the form as a gift.

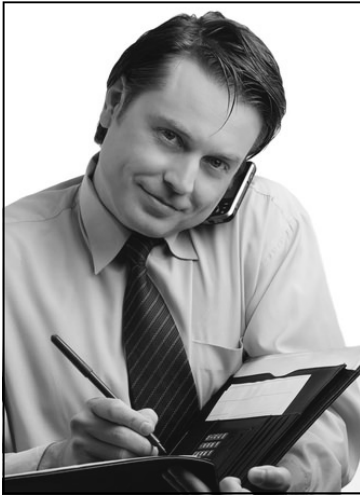
Do you think this is a good method of keeping in touch with your customer and if so why, or why not?

**TEACHER / TRAINER GUIDANCE NOTES**

This is quite a common practice with some businesses especially retailers. It would be interesting to see what the student or trainee thinks about this practice.

SAMPLE SAMPLE





## MONITOR PROCEDURAL ASPECTS OF SERVICE DELIVERY FOR EFFECTIVENESS AND SUITABILITY TO CUSTOMER REQUIREMENTS

There are many elements to customer service and some everyday tasks that happen at work that may seem to be an element of customer service can actually have a significant effect on customers service...both good and bad.

Let's look at some examples:

- ☆ Number of rings before the telephone is answered, if it is too many the customers may just hang up or if it is too quick the customer is caught off guard...three to four rings is the norm.
- ☆ Sending information to the customer should be done promptly and then followed up. The information should be relevant, accurate and easy to understand.
- ☆ Orders should be clarified and written orders filled in clearly and accurately. Wrong products supplied, wrong pricing or sent to the wrong location will destroy the customer's confidence in you as well as the business.
- ☆ Accurately entering customer details in a database. If they are wrong such as spelling, addresses and so on, this could again lead to unfavorable interaction with the customer in the future.
- ☆ Resolving and documenting a complaint should be done without causing any annoyance to the customer. Again documentation needs to be accurate.
- ☆ Keeping appointments with customers. A customer that has made an appointment should never be kept waiting and never cancel on short notice without a strong reason.
- ☆ Return customer's telephone calls and/or emails promptly.
- ☆ Any interaction with customers should be recorded and referred to each time you have interaction with the customer. Customers are impressed when you mentioned something you discussed earlier that most people would have forgotten.

The most common problem with the procedural aspects relating to customer service is record keeping and documentation. Inaccuracies and delays in providing documents or written information can have a serious and long lasting detrimental effect on the customer's perception of the business's customer service.

SAMPLE SAMPLE

**Learning  
Activity**

## Interview

**LEARNING ACTIVITY SIX**

In this activity you are to interview six people and ask the following questions:

- ☆ Have you ever received a letter or an email from a business where they had spelled your name wrong and if so, how did you feel?
- ☆ Have you ever made a call to a business and been put on hold for an extended amount of time and if so, how did you feel?
- ☆ Have you ever left a message for a salesperson to call you back and no one did and if so, how did you feel?
- ☆ Have you ever made a complaint to a store or business and they resolved the issue quickly and even offered you a gift and if so, how did you feel?

Give us their first name, age and genders. Tell us the type of business it was, the product or service they provided and the impression of the business the interviewee had after each question.

Compile your interview results in a report form and present the completed report to your teacher or trainer for review and discussion.

**TEACHER / TRAINER GUIDANCE NOTES**

This activity has several purposes. First, the interviewing process is a form of customer feedback gathering so the student or trainee is getting some practice at that. Secondly, the results of the interviews should show how something seemingly minor can have a big effect on the businesses customer service image and finally, it gives the student practice compiling reports that they may need to do in their own workplace.



## REGULARLY SEEK CUSTOMER FEEDBACK AND USE TO IMPROVE THE PROVISION OF PRODUCTS AND SERVICES

You will learn that there are two types of client feedback; 1) positive feedback and 2) negative feedback.

There is also feedback that is solicited (in other words you have asked for the feedback) and unsolicited feedback (feedback that is initiated by the client).

Whether it is good or bad, solicited or unsolicited, all customer feedback must be acknowledged and responded to.

To start with, a key part of any business is to learn what the client actually thinks. They need to be encouraged to offer their own feedback as to the quality of the products and/or services provided to them.

Request for and/or receiving feedback from customers can happen in a few ways.

The first and most informal way is to casually ask the customers questions about what they feel about the products and/or services provided to them. This should happen on a regular basis and the responses of the customer noted down in their files.

Another informal method of receiving customer's feedback is when they offer their feedback unsolicited, in other words, they were not asked for their feedback at the time. Again, this type of feedback is important and should be noted down in the customer's records.

The more formal way is to provide the customer a feedback form that has questions they are requested to answer and/or provide their thoughts on the products and/or services provided to them. This written feedback from the clients will also form part of the customer's records.

The information from the customer's feedback, both formal and informal feedback is an important part of what should be used to evaluate the level and quality of the customer service being provided and the quality of the products on offer. This should be done on a regular basis. Not doing so could have customers simply slip away to your competitors without you knowing and more importantly, knowing why.

More importantly, issues raised by the customer through their feedback should be responded to, or actioned on. It shows that you are serious about their business and want to retain them as a customer.

**Learning  
Activity**

## Task

**LEARNING ACTIVITY SEVEN**

In this activity we want you to create a script that you could use to seek feedback from a customer by telephoning them.

Tell us first tell us the type of business you are working for (this could be hypothetical) and the type of product and/or service (again this could be hypothetical).

Then outline on the next page the questions you would ask a customer over the telephone in order to gain some feedback as to the quality of the customer service levels and the products/service on offer.

***Type of business and their products and/or services on offer***

SAMPLE SAMPLE

## *Script*

SAMPLE SAMPLE

***TEACHER / TRAINER GUIDANCE NOTES***

This activity has the student practice interaction methods with customers relating to gathering feedback.

The script should include a question or two on how the business could improve its customer service.

SAMPLE SAMPLE

**Learning  
Activity**

## Task

**LEARNING ACTIVITY EIGHT**

In this activity we want you to create a customer survey form that you could use to seek feedback from a customer on a business's customer service and the products and services they have on offer.

Tell us first the type of business you are working for (this could be hypothetical) and the type of product and/or service you offer (again this could be hypothetical).

Then design a survey form on an A4 piece of paper with all the questions you think you would need to ask the customer relating to the business's level of customer service and the quality of the products and/or services on offer. When completed, present this form to your teacher or trainer for review and discussion.

***Type of business and their products and/or services on offer***

--

**TEACHER / TRAINER GUIDANCE NOTES**

This activity has the student practice developing feedback methods in a written form.

The script should include a question or two on how the business could improve its customer service.



### **ENSURE REPORTS ARE CLEAR, DETAILED AND CONTAIN RECOMMENDATIONS FOCUSED ON CRITICAL ASPECTS OF SERVICE DELIVERY**

By now you should have realised how important quality customer service is to the business.

You will also realise that many businesses put policies and procedures in place that relate to quality customer service and expect all staff to follow them.

As the staff member you may have been given the responsibility to train and monitor other staff members in customer service.

If that is the case then it would also be your responsibility to identify areas in the operation where customer service improvements or changes should be made.

While monitoring the customer service standards there may be issues that are revealed and this may require modifying business policies or procedures.

Or, you may have done some research on the business's customer service standards and this research may have revealed areas where improvements could be made.

This too may involve modifying business policies or procedures or it may require developing new policies or procedures.

Whether it involves modifying customer service policies or procedures, or developing new customer policies or procedures, in either instance the business owner or senior management would need to be involved.





## PRESENTING IDEAS TO MANAGEMENT

When presenting ideas that relate to improving customer service standards, it is important to consider not only the content, but the way the content is communicated. If we communicate in a rambling, confused way, we do not put ourselves in the best light, and we are less likely to get what we need from the management.

When providing a report on the aspects of customer service ensure it has been developed using verifiable information and evidence. The written document should be clear, concise and offer suggestions or recommendations as to how to improve on customer service levels.

People (and managers) all differ in their preferences for different forms and styles of communication. Some want a great deal of information in their reports, while some only want the sparse essential details. If you present your report in person or during a meeting, some managers are passive and sit quietly while you speak, while others use questions to draw the information from you.

This means you will want to pay attention to what your managers seem to prefer in terms of communication. Even though people differ, one thing is fairly consistent. Most managers do not have too much time to waste in today's workplace. If you have something to communicate, it is best to say it in a way that is complete, effective and short, whether it be in a report, a meeting or both.

Here are some basic pointers for those that want to make a suggestion or recommendations to the management. Again, the idea is to put forward an organised, concise suggestions or recommendations that will be easily read and/or heard by your managers.

You can follow the following pattern:

- ☆ Make the suggestion (a brief description of your ideas or recommendations)
- ☆ Give them the reasons why you are making the suggestions or recommendations
- ☆ Explain what will be gained by adopting your suggestion or recommendations (or lost if not adopted)
- ☆ Be prepared to answer questions about your suggestions or recommendations

If you follow these simple approaches, you are more likely to get your suggestions or recommendations accepted, or at least heard. In addition, you will be showing that you have taken the effort to think out your suggestions or recommendations before approaching the manager.

**Learning  
Activity**

## Question

**LEARNING ACTIVITY NINE**

Earlier in this Section we learned that when collecting information or data to review and possibly improve the business's customer service levels, what important factor about the information must not be forgotten.

***TEACHER / TRAINER GUIDANCE NOTES***

It must be based on verifiable evidence.

SAMPLE SAMPLE

**Learning  
Activity**

## Question

**LEARNING ACTIVITY TEN**

In this Section we mentioned four pointers that should be considered when presenting customer service information, suggestions and recommendations. What were those four pointers?


**TEACHER / TRAINER GUIDANCE NOTES**

- 1) Make the suggestion (a brief description of your ideas or recommendations)
- 2) Give them the reasons why you are making the suggestions or recommendations
- 3) Explain what will be gained by adopting your suggestion or recommendations (or lost if not adopted)
- 4) Be prepared to answer questions about your suggestions or recommendations

## SELF ASSESSMENT

Self assessment is where you ask yourself certain questions to ensure you have understood what you have learned while reading this manual and completing the learning activities. This unit requires you the student or trainee at the completion of your training to have a certain level of 'Required Knowledge' in which you would be need to have acquired and in which you will be assessed on.

This self assessment section reviews this required knowledge by way of questions and if you are able to say YES to all of them you can be confident your assessment will be satisfactory.

- ☆ Do you remember the eight steps to take in order to help identify a customers needs and expectation?
- ☆ Can you recall the types of customer requests that would need to be addressed as a high priority?
- ☆ Are you able to explain how the following six areas need to be considered when assisting to match a product to a customers needs;
  - A) Safety?
  - B) Performance?
  - C) Appearance?
  - D) Durability?
  - E) Economics?
  - F) Service?
- ☆ Do you know how to refer to and hand over a customer to a product specialist in an appropriate manner?
- ☆ Can you describe how to identify verbal and non verbal signals a customer may be expressing?
- ☆ Are you able to understand how to help to build a good rapport with a customer as well as why doing this can be a benefit in your futures sales prospects?
- ☆ Do you remember what key attributes to adopt in order to handle a customers complaints in a sensitive manner?
- ☆ Are you able to explain a few ways to help exceed the customers expectations when they are purchasing a product or service?
- ☆ Do you know what some of the external sources of information could include which could be part of improving a businesses customer service?
- ☆ Can you describe some of the various methods a business could apply in order to enhance the quality of the services and products they offer?
- ☆ Are you able to understand how the manner of some of the everyday tasks at work are attended to can have a significant effect on the quality of service a customer experiences?
- ☆ Do you remember some of the ways feedback from customers can be requested or received?
- ☆ Can you recall the advised methods to approach and offer suggestions and recommendations to management regarding improvements to customer services?

If there were any questions that you were unable to confidently say YES to, we encourage you to review the information again in this manual and if needed seek the assistance of your teacher or trainer.

## NOTES

SAMPLE SAMPLE