BSBCUS301
Deliver and Monitor a Service to Customers
User Guide

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Kerryn has been working with accounting software products for over twenty years. Originally working from 1994 as an accountant with small business when accounting software became mainstream. Kerryn then focused on providing consulting and training services to small business. Expanding from this into to providing curriculum-based resources to TAFE and private RTOs. From this she established Microstar Publishing and more recently incorporated OfficeLink Learning to provide a wide range of resources for the Accounting and Business Services Certificate courses. Kerryn has a long association with many TAFEs and RTOs across Australia.

Kerryn's fundamental aim is to provide resources that are easy to understand while providing a practical application of skills acquired.

Kerryn also co-authors two titles for Cambridge University Press which are in their 4th Edition – first published in 2000.

Kerryn has considerable experience and knowledge:

- Bachelor of Applied Science Mathematics
- Diploma of Education
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- CRI: Criterion Referenced Instruction
- Member of Institute of Certified Bookkeepers
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This User Guide is based on the User Guide V4.12

It is the Registered Training Organisation's responsibility to validate the mapping of this tool to the performance criteria.

Each section consists of:

- Headings identifying the topics/skills
- Explanation about the topics/skills
- Activity Tasks to work through with your Workplace Assessor and Class

Each User Guide is laid out in a similar way. The unit or competency number and name appears on the cover. For this unit it is:

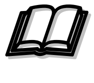
BSBCUS301 Deliver and Monitor a Service to Customers

Then there will be a contents page, overview section, the elements of the unit, the performance criteria and the questions and activities you need to complete.

Each unit is broken up into elements. These elements are the main themes of the unit of competency. The elements are then broken down into performance criteria, which are the activities you need to be able to perform to prove competence.

Explanation of Symbols:

Activity Task



Write Notes

Print Out

For more information, please talk to your Workplace Assessor.

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Unit 1

Project a Professional Image

By the end of this unit, you will be able to:

- Establish the needs of the customer
- Determine and outline company service level agreements
- Undertake a SWOT analysis
- Satisfy the needs of customers utilising call control techniques

1 Project a Professional Image

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

It is essential for you to develop sound knowledge of the products or services that are provided by your company. Irrespective of whether a customer is making a purchase, securing an appointment or seeking advice, you are in a position to influence the customer's decision and their behaviour.

Product or service knowledge is the key to understanding features and benefits. It also implies that you have a good understanding of how your company works, what its policies and procedures are and what its expectations are with regard to customer interaction.

When developing good product knowledge, use all the knowledge sources available to you. This could include:

- ✓ Studying brochures, flyers and technical information sheets from the manufacturer's catalogues
- ✓ Experimenting with products
- ✓ Asking customers about their experiences with the products/services
- ✓ Attending training sessions
- ✓ Studying policies and procedures
- ✓ Studying terms and conditions of products or services
- ✓ Accessing the latest information on specials or sale price items
- ✓ Finding out the methods of payment accepted and the terms of payment
- ✓ Gaining an understanding of how to identify quantity of stocked items

Activity Task 1

(a) Discuss with your group/Workplace Assessor what products/services are sold by your company.

(b) What sources are available to allow you to gain and maintain your knowledge of these products/services?

1.1 Establishing Customer Needs

In order to establish what the customer wants, make a point to listen, question, respond and provide some empathy. Show the customer that you are interested in providing assistance by paraphrasing what they say. You will need to establish whether it is a request for information, a request for action or a request to solve a problem.

Customer needs and expectations can be affected by:

- Cultural factors
- Time
- Personality
- Socio-economics factors
- Age
- Employment

Providing excellence in customer services means you understand that people will have different needs, expectations and wants. Therefore you will deal with each customer on an individual basis and make allowances for diversity.

Activity Task 2

(a) Discuss with your group/Workplace Assessor how the following indicators can affect the expectations of customers within your workplace.

Need / Expectation	Indicators
Cultural factors	- interpreter services may be required - explaining the services slowly and clearly
Time	
Age	
Personality	
Employment	

1.2 Industry Codes of Practice

As we now commence the process of indentifying and meeting the needs of our customers, there are legislative requirements that may need to be accounted for. These are designed to protect you, your customers and your employer as you undertake your daily duties. Obviously the codes of practice that are relevant will vary dependent upon the industry type. There are however some common regulations that cover the entirety of the Australian Workforce in areas such as the environment, workplace safety and even national security.

Below are some examples of the more common legislations, regulations and codes of practice that apply to most Australian workplaces as well as some examples of relevant codes per industry:

Common:

- Privacy Act
- Trade Practices Act
- Anti-discrimination legislation
- Occupational health and safety (OH&S) legislation
- Legislation covering competition, prudential regulation
- Insurance requirements, including public liability and professional indemnity
- Environmental Protection Act

Financial Services Industry:

- Income Tax Assessment Act
- Professional development requirements
- Australian Accounting Standards
- Consumer Credit Code
- Credit Act
- Finance Code
- Financial Transaction Reports Act

Retail Industry:

- Business Names legislation
- Electronic Funds Transfer Code of Conduct
- Sale of Goods Act
- Fair Trading (Australian Consumer Law)
- Prices Surveillance Act

Manufacturing Industry:

- Fair Work Act
- Dangerous Substances Act

Note: The lists above are an extremely small sample only. You should always speak to relevant personnel within your workplace to ensure that you are familiar with all of the Acts and Legislations that affect you, and your industry.

Activity Task 3

a) Discuss with your group/Workplace Assessor and Acts or Legislations that you are aware of that affect your workplace/industry.

b) Discuss with your group/Workplace Assessor the importance of non-industry specific related llegislations such as environmental or OH&S requirements.

c) Use the internet to locate a Code of Practice or an Act that is relevant to your industry. Describe its purpose and how it affects your daily tasks.

Act/COP :

Website:

Purpose:

Effect your daily tasks:

1.3 Service Level Agreements

As stated, it is an important task of any workplace to gain an understanding of the needs of their customers. It is just as important, however, that the requirements of the company are also accounted for. For example, it may not be feasible or possible to deliver a product to a customer within a particular timeframe or respond to their support needs on a same-day basis.

In an effort to standardise agreements, some workplaces will set up Service Level Agreements (SLAs) to incorporate the needs and expectations of both the customer and the company. A SLA quite simply defines the parameters for the daily dealings and interactions with customers, for the benefit of both parties. A SLA may incorporate the following:

- ✓ Identify the products and services to be supplied
- ✓ Identify roles and specify responsibilities of company employees and support staff
- ✓ Detail delivery and other support requirement timeframes
- ✓ Describe service levels users would experience when problems or questions arise

1.4 SWOT Analysis

A SWOT Analysis is a strategic planning tool used to evaluate the Strengths, Weaknesses, Opportunities and Threats involved in many aspects of the running of a company. Strengths and Weaknesses are internal to the organisation and are attributes that measure internal capabilities and behaviours. Opportunities and Threats originate from outside the organisation and refer to how the external environment can affect a business's customer approach.

The analysis can be carried out for any number of reasons, including marketing and sales strategies, new projects and, obviously, assessing customer service processes.

The undertaking of an effective SWOT analysis on a company's customer service can be of major advantage in many ways, including:

- ✓ Confirming current processes
- ✓ Identifying future enhancements or improvements
- ✓ Recognising areas for improvements
- ✓ Gaining an understanding of areas where complaints may be evident

A SWOT analysis is best performed in a group as a graphic exercise.

Strengths: Define areas you excel in, such as the company's core competency and resource analysis: • What does your company do well? • How strong is your company in the market? • Does your company have a clear strategic direction? • Does your company's culture produce a positive work environment?	**Weaknesses**: Evaluate your liabilities: • What could be improved at your company? • What does your company do poorly? • What should be avoided? • Is your company unable to finance needed technology? • Do you have poor debt or cash flow?
Opportunities: Analyse your customers and market attractiveness: • What favourable circumstances are you facing? • What are the interesting trends? • Is your company positioned to take on those trends? • Is your company entering new markets? • Is your company advanced in technology?	**Threats**: Check out what your competitors are doing and assess other potential challenges: • What obstacles do you face? • What is your competition doing? • Are the required specifications for your products or services changing? • Is changing technology threatening your position? • What policies are local and federal lawmakers backing that could affect your industry?

Activity Task 4

For this activity, describe a fictitious business that you have been placed in charge of (such as a call centre, takeaway outlet or mechanical business). In pairs, perform the following activities in relation to your workplaces. (*If you would prefer, you can complete these activities based upon your own workplaces.*)

(a) Outline some SLA measurements that you would implement and how they could be implemented/published.

Unit 2

Respond to Customer Requests for Information

By the end of this unit, you will be able to:

- Identify and build a rapport with customers
- Communicate effectively with customers
- Update customer records
- Source information and reply to customer enquiries
- Process customer orders
- Determine and maintain ethical standards in line with relevant government bodies

2 Respond to Customer Requests for Information

Your role may involve providing information and advice to clients about the products and services offered by your company. Knowing about the products and services, however, is useless unless you have found out exactly what the client or customer needs. Matching the information you have about products and services to the needs of a customer is a valuable skill.

2.1 Identifying Company Information

Start developing this skill by learning as much as you can about your products and services from viewing:

Information Source	Information to be found
Annual Reports	• Sales totals and trends • Marketing strategies
Brochures	• Product information • Marketing processes • Pricing information • Sales processes given to customers • Current customer "deals"
Websites	• Product information • Marketing processes • Pricing information • Sales processes given to customers • Complaints procedures • Returns policies • Current customer "deals"
Newsletters	• Product information • Marketing processes • Pricing information • Sales processes given to customers • Product updates Current customer "deals"
Price Lists	• Product pricing information
Information packs	• Product information • Pricing information • Product updates
Videos	• Product information • Product updates

Both external and internal customers seek a variety of information. (Not everyone speaks to external customers, however your colleagues internally are still your customers.) For example, a customer may ask:

- About products or services that are available.
- About features and benefits.
- For general information such as price or availability.
- For delivery estimates.
- For packaging specifications.
- For specific information such as brochures, reports, files, data.
- About guarantees and warranties.
- About special offers, discounts, terms of trading.
- About referees.
- About who is a specialist on the product or service.

When a customer contacts you, he or she expects to receive accurate, relevant and comprehensive information. Your listening, communication and interpersonal skills are extremely important. They help you understand a request and provide a positive professional image of your company.

Be aware of timelines in respect of responding to enquiries.

2.2 Identifying Customers

From the first contact, clients form an impression of an organisation. Asking questions and making sure you understand what customers want gives them confidence in your ability to help.

Clients may contact your company:

- ✓ Via telephone
- ✓ In person
- ✓ By letter or fax
- ✓ Via email
- ✓ Via the internet
- ✓ Via an intranet

Always use a polite, courteous and helpful manner when communicating with customers, as this will enable you to start to build a rapport. Speak clearly and slowly.

Remember, your company's policies and procedures may have a requirement for you to ask your customers questions to identify themselves. Some industries have legislative requirements that must be fulfilled each time a call is received in order to identify customers.

These could include:

Confirm Details	Name Address Date of Birth Phone Numbers
Request Information	Passwords Registration Numbers ID Numbers

2.3 Build a Rapport

Here are some techniques that can be used to build a rapport with a customer.

- Use the customer's name
- Say please and thank you
- Show interest in the customer's needs
- Ask open questions and show a real interest in the answers
- Listen for 'free information' which gives clues to other possible topics of interest
- Let the customer know his or her options
- Re-word the request to make sure you completely understand what the customer is asking
- Be empathetic to the customer's feelings (not sympathetic)
- Use small talk. It is important, however, that it does not become intrusive or a waste of time
- Do not use too much jargon
- Do not use slang or rude words
- Only talk about yourself as a last resort

Once you have established rapport with your customer, you are in a better position to identify and help satisfy their needs.

2.4 Communicating

There are benefits and pitfalls to telephone service. For many people it saves time and is convenient because it eliminates travel. You can make a phone call from almost anywhere. On the other hand, communication is more difficult because the telephone eliminates the visual element of communication.

In many situations, the information communicated through non-verbal communication says more than the words that are spoken.

Face to Face

When communicating a message it is said that 93% of the message or meaning is communicated via non-verbal cues and only 7% via words.

On the Telephone

The figures change with communication via telephone because you cannot see the body language. The tone and pace of your voice communicate 82% of your message.

Written

When communicating in writing, ensure that you investigate all original documentation and instructions before putting pen to paper and replying.

Check that you have the correct contact details on the correspondence, as it would be inappropriate for the item to be sent to the wrong person.

At times it is necessary to confirm details in writing as this creates a confidence and understanding of the products and services. It also eliminates any assumptions.

2.5 Investigating the Enquiry

Sometimes when you are dealing with a customer enquiry, one of the most important things is to “dig for information” – in other words, find out exactly what the customer’s expectations are and specific details regarding the product or service. For example:

- Take notes during the phone call not after the customer has hung up.
- Check that you have understood the customer’s enquiry (start sentences with something like “Let me see if I understand...”, then paraphrase what they have said).
- Clarify details with closed questions.
- Look up any documentation that may have been stored in a computer system or file to confirm prices, products or services sold, details, delivery instructions, invoice or receipt numbers, etc.
- Request the customer forward any faulty product samples.

Information Checklist

In order to assist with the investigations process, many workplaces implement information checklists to assist in the information gathering and recording processes. These checklists usually contain two main sections:

1. A simple entry form to ensure that all relevant information is gathered effectively from the customer to assist with the investigations process.
2. A checklist or matrix outlining the sources of information that can be checked to ensure that all relevant information is sourced and delivered within company guidelines.

Once this checklist has been completed, the information can then be used to make sure that the needs of the customer have been accurately identified and met.

Activity Task 8

Discuss with your Workplace Assessor the following self-assessment questions, which relate to your role.

(a) List the sources of information that are available within your workplace and the type of information that they deliver.

(b) List the types of information that customers may request from your workplace.

(c) Discuss with your group/Workplace Assessor any special needs/requirements of your workplace customers.

(d) Discuss with your group/Workplace Assessor how knowledge of the following areas can assist with the customer service strategies of your workplace.

Building a rapport with customers

Written communication

Telephone communication

Face-to-face communication

Unit 3

Deliver Customer Service

By the end of this unit, you will be able to:

- Meet the special needs of the customer
- Cross sell products and services
- Handle customer complaints
- Gather and analyse customer feedback

3 Deliver Customer Service

Whether customers simply require a straightforward response to a request (for example the cost of a product or a delivery date) or are requesting more detailed information, it is important to deliver the response in an accurate and timely manner.

Below are some guidelines for providing clear, accurate and concise information to customers; however, you should refer to your company's policies and procedures.

1. Make sure you understand the product and service information you are communicating
2. Convey a professional and competent image
3. Consider what the other person already knows
4. Describe the product/service from the customer's point of view, based on their needs. (Features and benefits.)
5. Structure what you are going to say in a logical order
   - Break the instructions or information down into a series of steps or key points
6. Choose the right words
   - Be concise
   - Avoid jargon
   - Be descriptive
   - Be positive
7. Allow opportunities to ask questions at any time
8. Summarise what you have said
9. Check that they have understood
10. Confirm with the customer what action is to be taken

It is essential to record the details of customer requests, the questions they ask and the action that was taken. A record of contact with customers helps identify what was done for them, sending brochures or samples for example. It also provides proof of what action was taken which can protect your company. It may also provide your company the opportunity of following up on customer requests to convert a sale and also to improve your company's customer service.

Check your company's policies and procedures and your job description for further details.

Write Notes

3.1 Meeting the Special Needs of Customers

From time to time you will encounter customers with different backgrounds, cultures and abilities. Perhaps you will have to deal with some customers whose first language is not English. Some customers may have trouble hearing. It is your responsibility to know where you can access assistance from within your organisation.

Below are some tips on communicating in English with a customer for whom English is not the first language.

- Do not shout
- Do not mumble
- Do not use jargon
- Do not use jokes or sarcasm
- Try to avoid using Australian expressions
- Do speak slowly and clearly
- Use short sentences
- Rephrase sentences if necessary
- Be patient

There may come a time when you need to arrange for an interpreter service. It is your responsibility to know which languages are covered by the interpreter services and how to arrange an appointment.

Activity Task 12

Discuss with your Workplace Assessor the following self-assessment questions, which relate to your role.

(a) What special needs could your customers have? List them below.

(b) What strategies could you implement to meet the special needs of your customers?

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3.2 Cross Selling Products and Services

What is Cross Selling?

Assumption: Business-to-Business environment (B2B)

In general *cross selling* is when a company sells another type of good or service to their existing clients. Once a company has established a solid relationship with a client they can then look at *cross selling* other goods or services to that client.

An example of cross selling is with the company MYOB who sells accounting packages to small businesses. They have just recently launched a new service called M-Powered solutions, which is an online service for their clients. When a customer purchases the online service, MYOB have now cross sold from their original software package to a new service. The benefit to MYOB is increased revenue and the greater reliance the small business owner has on them. In this situation MYOB has taken advantage of their reputation in the marketplace and their relationship they have built with their customers.

How do you recognise a customer may need it?

The role of the sales and marketing department is to recognise opportunities in the market place. The sales person would utilise their skills at the client's site and observe any potential opportunities, ask questions of the customer and have a thorough understanding of the client's business. The marketing person examines industry trends, looks for future opportunities within the client's industry and goes to industry functions. This feedback helps a company to develop new goods or services and cross sell these to their customers.

What is the difference between Up Selling and Cross Selling?

The definition of up selling is when you increase sales with an existing customer, when they purchase more of the goods or service they normally purchase from you. For example, if a client bought another accounting module from MYOB, this would be classified as up selling. Alternatively if they used the online services MYOB provided, this would be classified as cross selling.

3.3 Identifying Up Selling and Cross Selling Opportunities

One of the most effective ways to enhance up selling and cross selling processes is to identify and manipulate marketing trends, customer demographics and the features v benefits of the products. These influences will not only affect the number of sales that can be made, but also the opportunities for increasing sales utilising up selling and cross selling techniques.

Marketing Trends

In general terms marketing trends refer to current standards and resources utilised by companies to sell their products. In many cases, the major marketing companies who run the advertising campaigns for large corporations will set the trends and media consumption methods that small businesses will then adopt these trends to assist them with their own marketing strategies. For example, advances in technology have led to more and more people using the internet on a daily basis leading to an increased amount of internet based sales and advertising. Using these trends, it may be useful to place links or promotions to other products on the purchase pages of a company website.

Demographics

The term "customer demographics" is used to describe a loose categorisation of a customer based on measurable factors such as age, income, place and status of residence or cultural beliefs. An example of some demographical measures is listed below:

Demographic	Influence
Age	A person's age can quite often determine what sort of products they may be interested in buying. For example, a younger person may be more willing to buy additional products if they make them look "cool" than an older customer.
Living conditions (rent, own or mortgage)	Whether the client is renting or owns their own home can affect not only their ability to purchase a product, but also the type of product that they buy. A person renting their home is less likely to buy extra home improvement products that someone in their own residence for example.
Marital status (children)	A married person may have different reasons for purchasing than someone who is single.

4 Appendix and Competency Mappings

4.1 Appendix 1 - Competency Mappings

BSBCUS301 - Deliver and monitor a service to customers		
1. Identify customer needs	**Chapter Content**	**Activity Task**
1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations.	Ch 1.1, 1.4 -1.5, 2.1 – 2.8, 3.1, 3.5	2, 4, 8 – 9, 12, 15 - 17
1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements.	Ch 1.1, 2.1 – 2.8, 3.1	2, 8 – 9, 12
1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options.	Ch 1.6 – 1.7, 2.4	5 – 6, 8
1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals.	Ch 2.11	10
2. Deliver a service to customers	**Chapter Content**	**Activity Task**
2.1 Provide prompt service to customers to meet identified needs in accordance with organisational and legislative requirements.	Ch 1.6 – 1.7, 2.5 – 2.11	5 – 6, 8 - 10
2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery.	Ch 2.3	8
2.3 Sensitively and courteously handle customer complaints in accordance with organisational and legislative requirements.	Ch 3.4	14
2.4 Provide assistance or respond to customers with specific needs according to organisational and legislative requirements.	Ch 3.1	12
2.5 Identify and use available opportunities to promote and enhance services and products to customers.	Ch 3.2 – 3.3	13
3. Monitor and report on service delivery	**Chapter Content**	**Activity Task**
3.1 Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements.	Ch 3.5	15 - 17
3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational and legislative requirements.	Ch 3.5	15 - 17
3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements.	Ch 3.5	15 - 17
3.4 Regularly seek customer feedback and use to improve the provision of products and services.	Ch 3.5	15 - 17
3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery.	Ch 3.5	15 - 17