

## **Deliver a Service to Customers**

This learner guide supports BSBCUS201B Deliver a service to customers in the BSB07 Business Services Training Package.

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# THE AIM OF THIS LEARNER GUIDE

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The aim of this learner guide is to give you skills and knowledge to successfully complete the assessment in the following unit of competency.

## BSBCUS201B Deliver a service to customers

This unit describes the performance outcomes, skills and knowledge required to deliver all aspects of customer service at an introductory level. It includes creating a relationship with customers, identifying their needs, delivering services or products and processing customer feedback.

### Employability skills

This unit contains employability skills.

### Application of the unit

This unit applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of customer service in a defined context under direct supervision or with limited individual responsibility.

### Prerequisites

There are no prerequisites for this unit.

Element	Performance criteria	Covered on page
On completion of this unit you should be able to:	You will know you have achieved this when you can:	
1. Establish contact with customers	1.1 Acknowledge and greet <b>customer</b> in a professional, courteous and concise manner according to <b>organisational requirements</b>	15, 20, 21, 22, 24, 28
	1.2 Maintain personal dress and presentation in line with organisational requirements	17, 22
	1.3 Communicate using appropriate <b>interpersonal skills</b> to facilitate accurate and relevant exchange of information	15, 21, 22, 24, 27, 29, 42
	1.4 Maintain sensitivity to customer specific needs and any cultural, family and individual differences	29
	1.5 Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements	15, 21, 22, 24, 29

<b>Element</b> On completion of this unit you should be able to:	<b>Performance criteria</b> You will know you have achieved this when you can:	<b>Covered on page</b>
2. Identify customer needs	2.1 Use appropriate questioning and active listening to determine customer needs	27, 28, 34, 37–38, 43, 49
	2.2 Assess customer needs for urgency to identify priorities for service delivery	14, 29, 31
	2.3 Provide customer with information about available options for meeting customer needs and assist customer to identify preferred option/s	31, 34, 42
	2.4 Identify personal limitations in addressing customer needs and seek assistance from <b>designated persons</b> where required	42
3. Deliver service to customers	3.1 Provide prompt customer service to meet identified needs according to organisational requirements	36–38
	3.2 Provide information regarding problems and delays, and follow-up within appropriate timeframes as necessary	38, 42
	3.3 Communicate with customers in a clear, concise and courteous manner	37–38, 42
	3.4 Identify <b>opportunities</b> to enhance the quality of service and products, and take action to improve the service whenever possible	37–38, 43
4. Process customer feedback	4.1 Promptly recognise <b>customer feedback</b> and handle sensitively according to organisational requirements	45, 47, 49
	4.2 Accurately record any feedback and communication between customers and the organisation according to organisational standards, policies and procedures	49
	4.3 Identify any unmet customer needs and discuss suitability of other products/services	55
	4.4 Support customers to make contact with other services according to organisational policies and procedures	42

## Section 1

### Anti-discrimination

No person in Australia can be excluded from an opportunity or treated differently because they are from a particular group or have particular beliefs or characteristics. This ensures that no matter what colour, gender, race, religion, age, disability, marital status, medical status, political persuasion or family status a person has, they will be treated exactly the same as any other person in that organisation. Australia has federal laws which legislate against discrimination:

- Age Discrimination Act 2004
- Australian Human Rights Commission Act 1986
- Disability Discrimination Act 1992
- Racial Discrimination Act 1975
- Sex Discrimination Act 1984.

### Equal employment opportunity

Equal employment opportunity (EEO) makes sure that everyone has equal access to available employment. As with the laws governing anti-discrimination, EEO treats everyone who applies for a job in exactly the same way regardless of their cultural background. Examples of Commonwealth EEO legislation include:

- Human Rights and Equal Opportunity Commission Act 1999
- Equal Opportunity for Women in the Workplace Act 1999
- Racial Discrimination Act 1975
- Disability Discrimination Act 1992.

### Work Health and Safety Act 2011

Workplace health and safety legislation requires employers to provide a safe work environment. It also requires employees to be trained and aware of health and safety issues in the workplace and to care for their colleagues and customers with that awareness.

Each organisation will include these Acts as the basis for developing policies and procedures specific to its own staff and work environment. Two policies which an organisation that deals with customers may develop are:

#### 1. Code of Conduct

A Code of Conduct defines the standard behaviour expected from employees. It gives information and advice to employees concerning their behaviour within their job role which ensures that the organisation is able to maintain compliance with legislation.

A Code of Conduct covers ethical issues such as honesty, integrity, confidentiality, respect, courtesy, due diligence and legislative compliance.

#### 2. Customer Service Charter

A Customer Service Charter clearly displayed in a business helps staff and customers know what is expected and that the organisation is committed to quality service. In the Parcels2You business, the customer service charter is framed and placed on the reception desk and is also prominently displayed from the menu on the website.

**Exercise 4**

Read the Parcels2You Customer Service Charter and answer the questions that follow.

*Parcels2You believes that good service EQUALS good business*

**So we will**

- Greet you warmly and thank you sincerely.
- Always serve you courteously and respectfully.
- Be knowledgeable about our products and services.
- Welcome your comments and deal with any problems quickly.

**You can help us by**

- Giving us all the information we need to help you.
- Telling us about your special needs.
- Letting us know how we can improve our services.
- Asking us to explain anything you are not sure of.

1. Give an example of how you would greet a customer warmly, courteously and professionally to Parcels2You.
2. Is courteous and respectful customer service satisfying a customer's *need* or their *expectation*?
3. Do you think a customer should be asked to say how you can improve your customer service? Why or why not?
4. Why should you smile at customers?
5. Why should legislation be considered by an organisation when it drafts a policy or procedure?
6. Why do you think workplace health and safety should be considered by a customer service representative?

Submit your completed exercise as instructed by your trainer.

# Personal dress and presentation

One of the most important requirements of an organisation is that their customer service staff present an image of professionalism to their clients. Every organisation is different and each will have a guideline of how their staff should present to the public, e.g. a carpentry business may require its carpenters to wear overalls with their logo embroidered on it and its sales staff may be required to wear tailored pants and buttoned shirt with logos.

Before you approach a customer to speak with them, your appearance has given that customer certain conscious and subconscious impressions of you.

- Is your clothing washed, ironed and well fitting?
- Are your shoes presentable?
- Is your hair clean and tidy?
- Is your makeup or facial hair neat and subtle?
- Have you attended to your personal hygiene and used deodorant and toothpaste?
- Have you cleaned and tidied your fingernails?
- Have you kept your jewellery to a minimum?
- Have you kept your use of perfumes to a minimum?

It is important to be suitably presented within the requirements of your organisation. You should remember that your appearance is a reflection of your own self-esteem.

Aiming to present yourself with the best possible appearance, regardless of whether your organisation requires casual or formal attire, is your duty from the moment you get out of bed in the morning.

No organisation can make you brush your hair in the privacy of your own bathroom but you can assure your employers that when you arrive at work, you will be putting your best appearance forward to their customers.

Your customer will choose to enter your business but they will not choose you as their customer service representative.

You will make the choice for the customer to continue their transactions with you by your attitude, your appearance, your responses and your desire to give the customer a satisfying experience. If they are not happy with it, they will leave or find another person to help them.

**Exercise 5**

Think of the presentation styles you see in these professions and complete the table.

<b>Business</b>	<b>Appearance</b>	<b>Attitude</b>
Fast food service		
Hairdressing salon		
Doctors surgery		
Bank		
Toy shop		

Submit your completed exercise as instructed by your trainer.

**Exercise 6**

John had been out partying with his mates after work on Tuesday night. He was so tired he fell asleep in his work clothes. His alarm didn't go off on Wednesday morning and so when he woke he was late for work. If he left immediately he could get to work on time.

What should John do?

Submit your completed exercise as instructed by your trainer.

## Section 1

### How do you know what is expected of you?

An organisation may develop a set of customer service principles that it regards as essential for maintaining customer relationships. This document would be available for all staff to read, understand and implement in their daily customer interactions.

The customer service principles would be given to new staff during induction sessions and kept in convenient locations within the office for easy access when required. It would also be displayed to customers.

#### Exercise 7

Parcels2You displays its customer service quality principles at the reception desk, on its website and at each employee workstation. Read the Parcels2You Customer Service Quality Principles and choose true or false to each statement in the table below. Hint: Also use your knowledge of the Parcels2You business from the information in the simulated environment.

#### *Parcels2You Customer Service Quality Principles*

Parcels2You aims to provide the best possible delivery of support to our customers by:

- researching new products and services, identifying and anticipating the changing needs of our customers—both external and internal—to ensure the satisfaction of their needs
- planning throughout the organisation ensuring awareness of common goals
- working constantly to improve our service delivery processes
- acknowledging the importance of our people at all levels and encouraging teamwork and coordination between teams
- encouraging the participation of all staff in the development and implementation of quality processes
- monitoring our processes at all stages and evaluating outcomes—especially customer satisfaction.

#### Experience in Parcels2You

Answer **true** or **false** to the following statements:

1. I work in a team.
2. We have regular meetings to plan our work.
3. I can access our quality policy easily.
4. I am expected to be committed to my job.
5. I can easily pass suggestions on to managers.
6. I feel that the organisation values my work.
7. I know what to do when something unexpected happens.

Submit your completed exercise as instructed by your trainer.



## How do you do what is expected of you?

There are many skills to master before you can be known as an excellent customer service representative. Imagine you are going to a job interview for a customer service position. The people who are interviewing you are looking for your natural ability in customer service skills. They realise that you will require further training to develop the skills and this will be included as part of your job role.

The skills they are looking for are known as **soft skills** meaning that you are not required to have any deep technical knowledge to perform them. They are humanistic and can be demonstrated by the majority of people who wish to work in the industry. Having excellent soft skills means you are capable of and have the ability to:

- listen effectively
- communicate verbally and non-verbally
- remain calm and patient in negotiations
- act on promises
- be honest
- show your customers you care
- keep up to date with product knowledge
- show confidence
- work under pressure and within a team
- analyse and solve problems
- learn from your mistakes
- be friendly
- understand your organisation's requirements
- manage your time efficiently
- work to deadlines.

For the majority of people, these soft skills come easily when treating customers with courtesy and respect. By showing these skills in your dealings with customers you are guaranteeing the customer will be satisfied; thus satisfying the organisational requirements.

### Exercise 8

1. What soft skills do you think are necessary for a customer service representative who is working as a cashier in a supermarket?
2. What soft skills do you think are necessary for a customer service representative who is working at Parcels2You?
3. Why do you think it is important to be able to learn from your mistakes if you are a customer service representative?
4. Do you think honesty is always the best policy when dealing with customers? Why or why not?

Submit your completed exercise as instructed by your trainer.

## SECTION 2: IDENTIFY CUSTOMER NEEDS

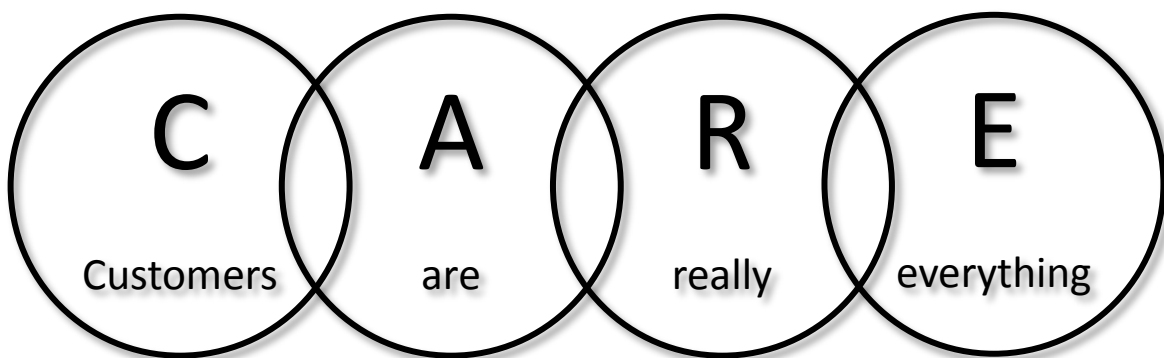
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### Caring for your customers

The single most important factor to remember when delivering customer service is that the customer is the most important person in the business.

The customer is not dependent on your business for survival but the business definitely is dependent on the customer. You are not doing the customer a favour by serving them, they are doing you a favour by coming to your business and their transactions are what keep you in employment.

So you have to learn to CARE about the customer.



Showing that you care begins from the moment the customer makes contact with the business. Regardless of how that initial contact is made, e.g. walking into an office or contact via phone, email or fax, the onus is on you to provide excellent customer service.

Your first duty is to greet the customer. Secondly you identify their needs and provide opportunities to enhance the service. Finally the customer will leave you with their impression of the transaction.

Identifying the needs of your customer will allow you to show them you care. A customer wants to:

- be understood
- feel welcome
- feel important
- be comfortable.

Your first impression is a simple step but the most important one in building a relationship with the customer. You are representing the business. To the customer, you **are** the business. If the customer's impression of you is poor, so too will be their impression of the business. You must show your sincerity, empathy and interest in meeting their needs and expectations.

Your interpersonal skills and the rapport you build will facilitate the exchange of accurate information.

Excellent communication includes the ability to:

<b>Maintain clarity</b>	<p>To be clear in your communication you need to be conscious of the words you use and how you deliver them. It is not just what you say, but how you say it that is important.</p> <p>Example: Avoid saying 'I'll try ...'. This leaves the customer in confusion as to whether the situation will be resolved. Instead be honest if the situation cannot be resolved and state that clearly.</p>
<b>Communicate in a concise manner</b>	<p>So a customer can understand your message quickly, keep your communication short, simple and appropriate.</p> <p>Example: Do not say 'I have endeavoured to rectify this situation and happy to report I can meet your needs.' Instead, say 'I have found a solution to help you.'</p>
<b>Show genuine interest</b>	<p>Avoid being distracted when dealing with a customer. A customer wants to feel important and to know that you are working with them to satisfy them as a priority. They do not want to feel they are a burden to your work.</p> <p>Example: Do not allow other people, technology or events to take your attention away from your customer. Avoid 'I'll have to check on that' and replace it with 'I'll be glad to check on that for you.'</p>
<b>Act with sensitivity</b>	<p>Customers have unique needs and come from a wide range of cultures and backgrounds. It is your job to avoid stereotyping any customer and to act with sensitivity to any request a customer has that is unique to their culture.</p> <p>Example: A middle aged man enters an extreme sports shop and asks to be shown mountain climbing equipment. The customer service representative asks if he wants it for his son. The man has been stereotyped by the customer service representative who has assumed he is too old for that sport.</p>
<b>Show courtesy</b>	<p>Courteous responses have a social value that make a customer feel appreciated. The time taken to give a courteous remark is small compared to the value it has in establishing a relationship with the customer.</p> <p>Example: Use 'please', 'thank you', 'you're welcome' and 'I appreciate it' as part of your essential dialogue with any customer.</p>
<b>Demonstrate respect</b>	<p>Respect is showing customers that they have value and are important to you. You show them that you admire them and that you are genuinely interested in satisfying their needs and expectations.</p> <p>Example: Two customers are waiting to be served at the same time. Showing respect is acknowledging both of the customers and allowing them to decide who will be served first rather than you making the decision.</p>

## Section 3

### Solving problems

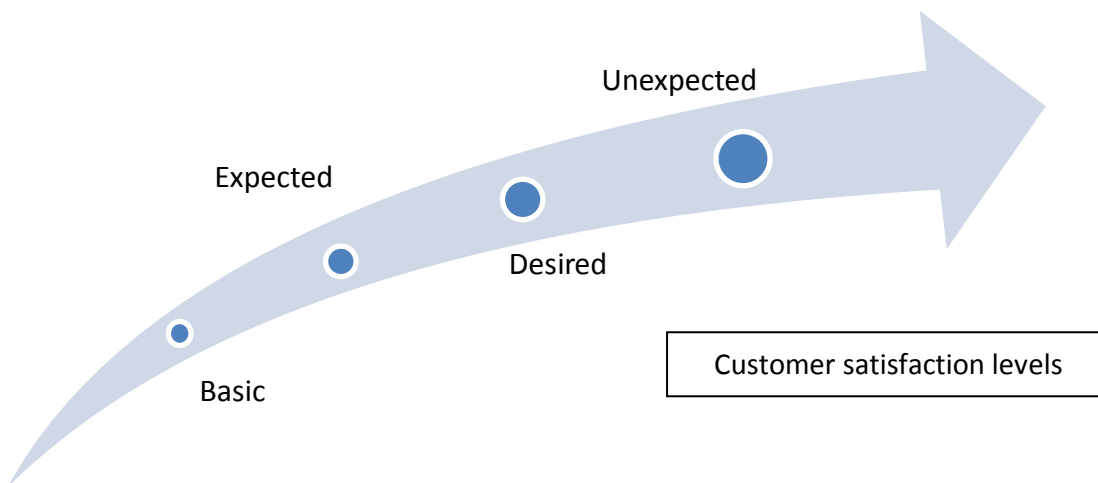
One of the basic needs of customers is to have efficient *action* taken to solve any problems that arise during their transactions. Practical solutions and options provide the customer with satisfaction of a basic need, i.e. the need to feel *appreciated*.

By offering the best possible options you are meeting and exceeding customer requirements.

A customer's level of satisfaction increases each time you take an opportunity to enhance the quality of service, or the product, by identifying all possible solutions that could meet their needs and expectations.

Your effective communication of those available options to the customer assists in raising their satisfaction levels by empowering the customer to make a choice and thus feel respected.

A feeling of empowerment is given to the customer whenever a choice is offered to them.



As an example of this you could imagine that a customer has placed an order for a new photocopier for their office.

- The **basic** level of satisfaction would be that the photocopier is received by the customer.
- If the photocopier arrives on time, the **expected** level of satisfaction is reached.
- If the photocopier arrives on time, is well packed, has all paperwork handled efficiently on delivery and has no obvious problems with the photocopier or the delivery, the **desired** level of satisfaction is reached.
- If the photocopier:
  - arrives on time
  - is well packed
  - has all paperwork handled efficiently on delivery
  - has no obvious problems with the photocopier or the delivery
  - the delivery company carries the photocopier to the photocopier room
  - the customer service department gives an additional follow up phone call to confirm the customers' satisfaction

the **unexpected** satisfaction level is obtained.

# Evidence requirements

## Critical aspects of evidence

The following evidence is essential to demonstrate competency in this unit:

- demonstrating all stages of customer service interactions
- responding to customer feedback
- demonstrating a range of interpersonal skills
- knowledge of relevant legislation.

Submit your completed exercises as instructed by your trainer.

- All exercises in workbook
- All questions in assessment task 1
- All questions in assessment task 2

Element	Performance criteria	How will the evidence be gathered?
1 Establish contact with customers	1.1 Acknowledge and greet <b>customer</b> in a professional, courteous and concise manner according to <b>organisational requirements</b>	Exercises 4, 7, 8, 9, 10, 11, 13 Assessment tasks 1.2, 1.18, 1.25, 2.1
	1.2 Maintain personal dress and presentation in line with organisational requirements	Exercises 5, 6, 9 Assessment tasks 1.3, 1.4, 1.25,
	1.3 Communicate using appropriate <b>interpersonal skills</b> to facilitate accurate and relevant exchange of information	Exercises 4, 8, 10, 11, 13, 13, 15, 25 Assessment tasks 1.7, 1.10, 1.11, 1.12, 1.25, 2.1, 2.2
	1.4 Maintain sensitivity to customer specific needs and any cultural, family and individual differences	Exercises 3, 10, 11, 11, 14, 15, 15 Assessment tasks 1.5, 1.6, 1.25, 2.3
	1.5 Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements	Exercises 4, 8, 9, 11, 15 Assessment tasks 1.7, 1.8, 1.25, 2.1, 2.2, 2.3
2 Identify customer needs	2.1 Use appropriate questioning and active listening to determine customer needs	Exercises 12, 13, 19, 22, 24, 26, 30 Assessment tasks 1.8, 1.10, 1.11, 1.12, 1.25, 2.2
	2.2 Assess customer needs for urgency to identify priorities for service delivery	Exercises 2, 15, 16, 17, 17 Assessment tasks 1.13, 1.16, 1.24, 1.25, 2.4
	2.3 Provide customer with information about available options for meeting customer needs and assist customer to identify preferred option/s	Exercises 18, 18, 18, 19, 20, 25 Assessment tasks 1.14, 1.15, 1.24, 1.25, 2.3, 2.4

Element	Performance criteria	How will the evidence be gathered?
	2.4 Identify personal limitations in addressing customer needs and seek assistance from <b>designated persons</b> where required	Exercise 25 Assessment tasks 1.15, 1.17, 1.25
3 Deliver service to customers	3.1 Provide prompt customer service to meet identified needs according to organisational requirements	Exercises 21, 22, 23, 24 Assessment tasks 1.15, 1.17, 1.25,
	3.2 Provide information regarding problems and delays, and follow-up within appropriate timeframes as necessary	Exercises 24, 25 Assessment tasks 1.15, 1.17, 1.25, 2.4
	3.3 Communicate with customers in a clear, concise and courteous manner	Exercises 22, 24, 25 Assessment tasks 1.2, 1.10, 1.11, 1.12, 1.18, 1.25, 2.1, 2.2, 2.3, 2.4
	3.4 Identify <b>opportunities</b> to enhance the quality of service and products, and take action to improve the service whenever possible	Exercises 22, 24, 26 Assessment tasks 1.19, 1.25, 2.4
4 Process customer feedback	4.1 Promptly recognise <b>customer feedback</b> and handle sensitively according to organisational requirements	Exercises 27, 28, 29, 30 Assessment tasks 1.20, 1.21, 1.22, 1.23, 1.25, 2.4, 2.5
	4.2 Accurately record any feedback and communication between customers and the organisation according to organisational standards, policies and procedures	Exercise 30 Assessment tasks 1.22, 1.25, 2.5, 2.6
	4.3 Identify any unmet customer needs and discuss suitability of other products/services	Exercise 30 Assessment tasks 1.24, 1.25, 2.4
	4.4 Support customers to make contact with other services according to organisational policies and procedures	Exercise 25 Assessment tasks 1.15, 1.17, 1.25, 2.4