

Learner Assessment Pack

**Deliver and Monitor a
Service to Customers**

BSBCUS301



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BSBCUS301
Deliver and Monitor a Service to Customers

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Learner Assessment Pack Assessment Delivery



Learner Information

Each Learner Assessment Pack is made up of three parts:

Assessment Delivery

- Learner Information
- Steps for Learners
- Assessment Agreement

Assessment

- Tasks
- Context
- Assessor Feedback

Recording

- Record of Assessment

Before you commence your Assessment, ensure that you have good knowledge of the subject, have thoroughly read your Learner Resource, and clearly understand the Assessment requirements and the expectations of the Assessor.

You may be required to demonstrate knowledge and skills which may be difficult for the Assessor to witness. If so, an Evidence Record is supplied which will allow the knowledge or skill to be verified by at least one third party, and preferably two or more. These witnesses would usually be current or recent supervisors or your Assessor.

Explanations are given for each Task. If you have any questions, consult with your Assessor.

To contextualise this Assessment to your industry, you must complete a few additional tasks based on your employer's industry. These will be provided by your Assessor.

The assessment tasks may be answered using your business, the simulated business or a mixture of both as instructed by your Assessor.

Records must be kept of all aspects of the Assessment in your Learner Pack.

The record of assessment is a **legal document** and must be signed, dated, and a copy stored as required by your Registered Training Organisation (RTO).

Steps for Learners

1. Receive your Learner Assessment Pack and discuss with your Assessor the expectations of this Assessment. You may also need to supply contact details of one or two work referees who can confirm your skills in the industry. Discuss with your Assessor if you intend to undertake the tasks based on your employing organisation or using the simulated business, Bounce Fitness or a mix of both.
2. Your Learner Assessment Pack is where you will get the Task information. Complete the Tasks as instructed, using either the simulated business, Bounce Fitness, or your employing organisation and include in the Learner Assessment Pack for your Assessor.
3. After you complete your Assessment, gather and return your evidence documents, as detailed in the Task(s) in the timeframe agreed with your Assessor.

Assessment Agreement

Have you signed off:



Delivery Method

- Classroom
- Small Group
- One-on-One
- Online
- Other (please describe)



Assessment Method

- Learner's Organisation –
Pre-assessment meeting conducted
- Simulated Business



Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the customer service field of work and include access to:

- Office equipment and technology
- Workplace documents, organisational policies and procedures for customer service
- Examples of customer complaints and feedback
- Case studies and, where possible, real situations
- Interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

I confirm that the activities and assessment completed as part of this unit are my own work and comply with all relevant copyright and plagiarism rules. I understand that if there is any doubt of the authenticity of any piece of my assessment I can be orally examined and the signatory of evidence records may be contacted.

Learner Name _____

Learner Signature _____ **Date** _____

Assessor Name _____

Assessor Signature _____ **Date** _____

Learner Assessment Pack

Assessment



To be assessed for this competency, you must demonstrate your ability to:

- Use communication skills to establish rapport and build relationships with customers in accordance with organisational requirements
- Identify customer needs using appropriate questioning and active listening skills
- Provide customer service in accordance with organisational requirements
- Respond to and record customer feedback and action taken according to organisational standards, policies and procedures
- Produce a report which identifies and recommends ways to improve service delivery.

The following Assessment Tasks must be completed by you to enable you to demonstrate these skills. These must be conducted:

Using the simulated business Bounce Fitness

or

In your own workplace if you are able to access all the documents and conduct all of the activities.

If you are using your own business, simply replace references to Bounce Fitness with the name of your organisation.

Ensure that you gain the approval of your choice with your Assessor before commencing.

The documents you will require if you are using the simulated business Bounce Fitness can be found on the Bounce Fitness website:

- Performance tab / Cairns / Cairns Staff, Cairns Complaints and Cairns Customer Satisfaction Survey Results
- Documents tab / Customer Relationship Management Folder

You may need to conduct further research.

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Task 1 – Theory: Short Answer Questions

You are working for Bounce Fitness as a personal trainer. A client has entered the Centre, and wishes to speak to someone about buying a membership. Describe the process you would undertake in order to gain the information that the customer will require in order to make a decision regarding the membership. You should note that you do not have to mention specific aspects of the membership, rather just provide a general indication of how you would get to know the customer's needs. Ensure that in your answer you cover the following:

- a) What interpersonal skills you would use, and how they would assist you in gaining information?
- b) How you would assess the client's needs, and prioritise them in order to provide relevant information?
- c) What types of information you would provide to the customer given the information you will have gained from them?
- d) What limitations do you note in your own performance when identifying client's needs? What do you recommend you should do to improve this?
- e) A customer has entered your office, and wishes to gain some information about the training that you offer, however you are on a call from Head Office asking for some reports they urgently require. How would you deal with this situation?
- f) What is rapport? How have you tried to gain rapport with your customers in the past?
- g) A customer has come into the office, and has a complaint that they have not received their membership card, and it has now been three weeks since they joined. They are very angry and are shouting quite loudly at you. How would you deal with this customer?
- h) Briefly describe the most important points for you to remember about each of the following:
 - Anti-discrimination legislation
 - Ethical principles
 - Codes of Practice
 - Privacy laws
 - Financial legislation
 - Workplace Health and Safety (WHS)

Include copies of any documents to which you refer on the Bounce website and reference any external information for your Assessor.

Assessor Feedback

Key Points and Suggested Answers

Assessor feedback is recorded here. The Assessor will record what they saw or heard, how it related to the performance criteria, their judgement and why they made that judgement.

Task 1 – Theory: Short Answer Questions

SAMPLE

Task 2 – Role Play: Delivering Service to Customers

Area for role play activity.

Task 3 – Project: Monitoring Service Delivery

Area for project activity.

Task 4 – Evidence Record

Large empty rectangular box for recording evidence.

Tasks Sign-Off Sheet

Learner Name

Learner Signature

Date

Assessor Name

Assessor Signature

Date

Learner Assessment Pack Recording



Record of Assessment

Learner Details	Assessor Details
Name	Name
Course Code	Site and Date
Unit Code BSBCUS301	Unit Name Deliver and Monitor a Service to Customers

Performance Criteria Mapping			
Assessment Activity	PC Mapping	Satisfactory	Needs More Evidence
Task 1 – Theory: Short Answer Questions	a) 1.1 b) 1.2 c) 1.3 d) 1.4 e) 2.1 f) 2.2 g) 2.4	<input type="checkbox"/>	<input type="checkbox"/>
Task 2 – Role Play: Delivering Service to Customers	1.1, 1.3, 1.4 2.3, 2.4, 2.5 3.2	<input type="checkbox"/>	<input type="checkbox"/>
Task 3 – Project: Monitoring Service Delivery	a) 3.2, b) 3.1, 3.3 c) 3.4, d) 3.1, 3.4	<input type="checkbox"/>	<input type="checkbox"/>
Task 4 – Evidence Record	1.1, 1.2, 1.3, 1.4 2.1, 2.2, 2.4, 2.5 3.1, 3.2, 3.3, 3.4, 3.5, 3.6	<input type="checkbox"/>	<input type="checkbox"/>

Performance Evidence Mapping			Satisfactory	Needs More Evidence
PE1	Use communication skills to establish rapport and build relationships with customers in accordance with organisational requirements	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
PE2	Identify customer needs using appropriate questioning and active listening skills	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
PE3	Provide customer service in accordance with organisational requirements	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
PE4	Respond to and record customer feedback and action taken according to organisational standards, policies and procedures	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
PE5	Produce a report which identifies and recommends ways to improve service delivery.	Tasks 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>

Knowledge Evidence Mapping			Satisfactory	Needs More Evidence
KE1	Summarise key provisions of relevant legislation from all levels of government that may affect aspects of business operations	Tasks 1, 2, 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
KE2	Explain organisational policy and procedures for customer service, including handling customer complaints	Tasks 1, 2, 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
KE3	Provide examples of verifiable evidence that could be used to review customer satisfaction	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
KE4	Outline the interpersonal skills needed for serving customers, including customers with specific needs.	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>

Context Mapping	PC Mapping	Satisfactory	Needs More Evidence
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Foundation Skills Mapping					
Skill	Description	ACSF Level	Mapping	Satisfactory	Needs More Evidence
Reading	Comprehends textual information to determine customer service requirements	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Proofreads texts for clarity of meaning and accuracy of grammar and punctuation	3	Tasks 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
Writing	Completes responses to customer complaints in required format	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Prepares reports using sequencing, format and words to communicate recommendations clearly and effectively	3	Tasks 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
Oral Communication	Provides information or advice using structure and language to suit the audience	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Asks questions and listens to gain information or confirm understanding	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
Navigate the world of work	Recognises, understands and applies organisational policies and procedures relevant to role	3	Tasks 1, 2, 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
Interact with others	Selects and uses appropriate communication conventions to establish connections, build rapport, seek information and develop professional working relationships	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Adjusts personal communication style in response to the opinions, values and particular needs of others	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
Get the work done	Plans and implements systems to gather and organise information	3	Tasks 1, 2, 3 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Monitor actions and progress against goals and implements adjustments as appropriate	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Uses problem-solving skills to analyse and respond to customer complaints or enquiries	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>
	Identifies and follows up on opportunities to improve work practices and outcomes	3	Tasks 2 and 4	<input type="checkbox"/>	<input type="checkbox"/>

(please tick appropriate box)	Yes	No
Comments and future action noted in Learner Assessment Pack	<input type="checkbox"/>	<input type="checkbox"/>
Results discussed and agreed to You have the right to appeal the outcome of your assessment.	<input type="checkbox"/>	<input type="checkbox"/>
The Learner is	Competent <input type="checkbox"/> Not Yet Competent <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

Learner Comments

Assessor Comments

Details of further evidence required

After reassessment the Learner is	Competent <input type="checkbox"/> Not Yet Competent <input type="checkbox"/>
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Assessor Signature **Date**

The signature confirms that I have submitted all my own work and agree with the assessment decision and feedback.

Learner Signature **Date**

