

Trainer Manual & Assessment

Deliver and Monitor a
Service to Customers

BSBCUS301

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Deliver and Monitor a Service to Customers

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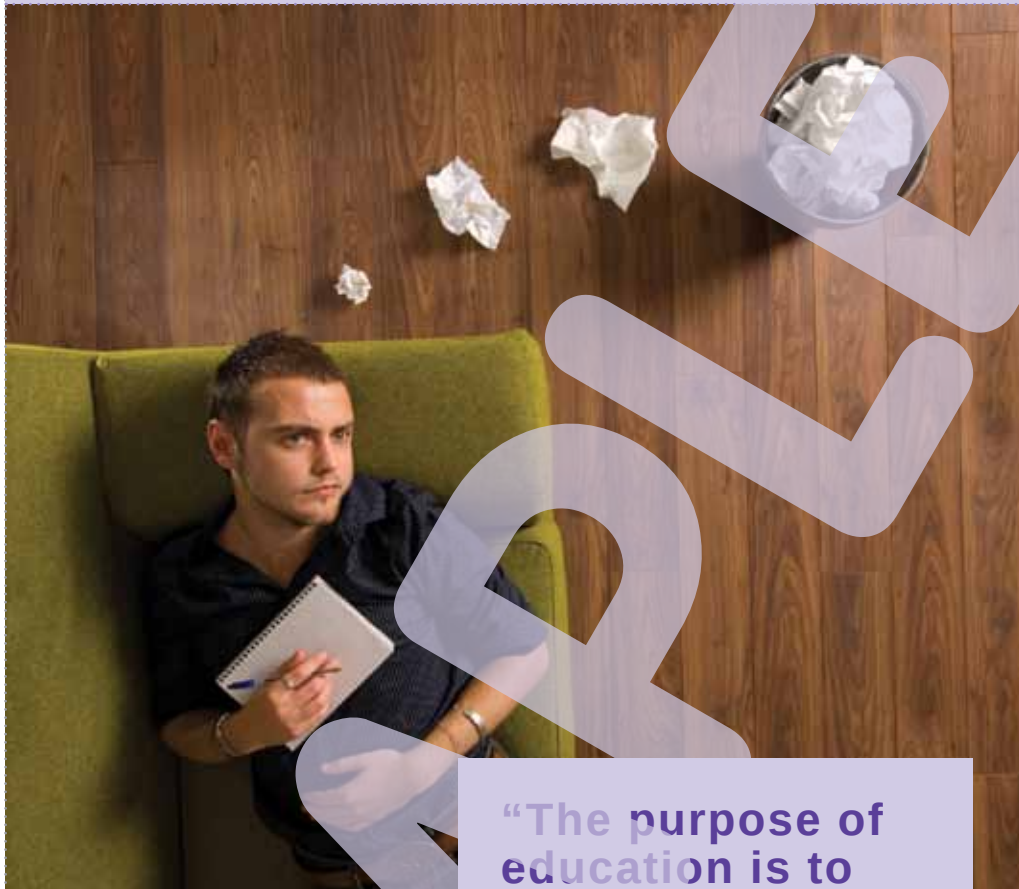
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SAMPLE

About BSB Business Services Training Package



“The purpose of education is to replace an empty mind with an open one.” Malcolm Forbes

About the Business Services Industry

The BSB Business Services Training Package covers a diverse range of industries and occupations. Business Services covers a range of cross-industry functions and services supporting the commercial activities of all industries.

Defining Qualifications

When units of competency are grouped into combinations that meet workplace roles, they are called qualifications. These qualifications are aligned to the Australian Qualifications Framework (AQF). Each qualification will have 'packaging rules' which establish the number of core units, number and source of elective units and overall requirements for delivering the qualification.

Delivery and Assessment of Qualifications

RTOs must have the qualifications (or specific units of competency) on their scope to deliver nationally recognised training and assessment. RTOs are governed by and must comply with the requirements established by applicable national frameworks and standards. RTOs must ensure that training and assessment complies with the relevant standards.

Qualification Training Pathways

A pathway is the route or course of action taken to get to a destination. A training pathway is the learning required to attain the competencies to achieve career goals. Everyone has different needs and goals, and therefore requires a personalised and individual training pathway.

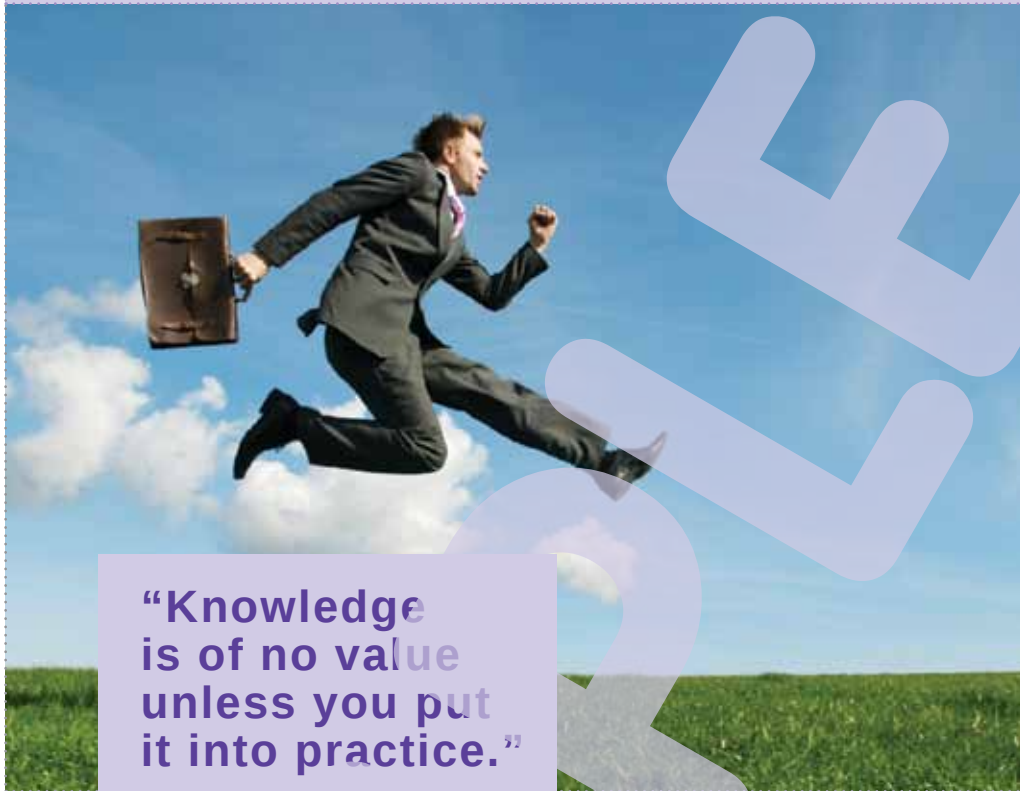
Foundation Skills

Foundation Skills are the non-technical skills that support the individual's participation in the workplace, in the community and in education and training.

Australian Core Skills Framework (ACSF)

This Assessment meets the five ACSF core skills as described in the Foundation Skills mapping.

Introduction



“Knowledge is of no value unless you put it into practice.”

Anton Chekhov

This unit describes the performance outcomes, skills and knowledge required to identify customer needs and monitor service provided to customers. Operators may exercise discretion and judgement using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over either a short or long term interaction.

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts.

This manual is broken up into three distinct sections. They are:

- 1. Identify Customer Needs** – First we will examine the process of establishing what it is that your customers need, as well as the interpersonal skills required of you as a service provider.
- 2. Deliver a Service to Customers** – Then we will examine the next step in the provision of services: taking the identified needs of your customers and delivering a service that they expect.
- 3. Monitor and Report on Service Delivery** – Finally we will examine how you can monitor the delivery of services that you provide to your customers.

At the conclusion of this training you will be asked to complete an assessment pack for this unit of competency. The information contained in this resource will assist you to complete this task.

On conclusion of this unit of competency you will have demonstrated your ability to identify customers' needs and monitor a service provided to customers.



ELEMENT 1: Identify Customer Needs



Performance Criteria Element 1

- 1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations
- 1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational requirements
- 1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options
- 1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals.

Identify Customer Needs

Use Appropriate Interpersonal Skills to Accurately Identify and Clarify Customer Needs and Expectations

Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements

Know Your Customer

In a situation where you are providing a service, an important maxim to remember is that it is your business to know your customers' business. If you are able to take the time to attempt to get to know your customers, whether they are large or small, you will be able to best meet their needs and wants. Some of the things you may think about attempting to ascertain are:

- Their needs
- Their preferences
- Their requirements.

Managers are looking to establish a high level of satisfaction among their customers. This requires you to know exactly what it is that they are seeking and how you can assist those customers in getting there. Think, for example, about buying a cake. The actual ingredients generally do not matter and the technical names are not known, but the actual end product – the cake – is what is most important in these processes. It is this that will bring about the level of required satisfaction.

So, think about the products that you sell. Generally the actual benefit behind any product you sell doesn't change over time. What does change, however, are some of the basic attributes like colour, features, and quality.

A company that looks solely at the way it produces quality benefits for its customers is more likely to be profitable. Organisations look to attempt to enhance these benefits in order to make their customers willing to spend more on those products.

An important consideration is why a person purchases a given product. This reason may seem logical from the point of view of the customer but may be impossible to work out for the organisation.

Everyone is Different

Every one of your customers has a unique set of needs that require a unique set of benefits to be resolved. Consider carefully:

- The pressures a person feels when choosing a product
- The considerations they make
- The benefits they want to achieve
- The perceptions of a customer.

By carefully examining the benefits they want to achieve, you can put yourself in a position of actually meeting and even exceeding those needs.

Customers, however, can be difficult creatures. They often hide the exact reasons why they are making a purchase – in some cases they may not even know themselves – or you may find that there are multiple reasons for a given purchase. Think about purchasing a new house ... you may want:

- More room
- A nice garden
- Lower council rates.

In some cases reasons work together and others are opposed. The reasons are often very complicated to work out.

Reasons could be trivial, reasons could be intimately related to just not liking a specific brand, or store selection may be completely random. However, knowing the rationale behind buying decisions, no matter how they are made, is critical.

As a service provider, you will find that your customers will have expectations of how their needs should be met. It is important that you try to find out what their expectations are and exceed them with exceptional customer service. This is the best way of winning customers who will remain customers for life. Exceeding expectations is the best way of providing good quality customer service.

Customer service aids profitability, and ensures that you, as a company, are in the best position to provide your customers with what they want to meet their needs. In order to accomplish this, you will need to:

- Establish a trust-filled relationship with your customer base
- Determine what your customers expect from you
- Ensure that you meet these basic expectations and plan to exceed them wherever possible
- Provide friendly service as much as you can.

Improving Your Skills

Thus far we have looked at the importance of getting to know your customers, and their needs and wants. We will now look at ways in which you can go about attempting to use interpersonal and communication skills to learn about your customers. Communication is the key. If you can communicate effectively, it becomes much simpler to ascertain what it is your customers want or need.

Principles of Good Communication

A good customer service representative thinks from the point of view of the customer. They take responsibility for what is being communicated, how well it is being communicated, and how well it is being understood. Rather than blaming the customer for not understanding what you are saying, good communicators look back at themselves first and ask what they could have done to improve the quality of the communication that they are sending.

We all communicate with others at work, at home, with friends, or with colleagues. It is an essential life skill, and as we have already mentioned, crucial to success in customer service. When we communicate with customers or clients, we expect some form of result:

- We expect the customer to respond in some way
- We may expect them to change their attitude, their behaviour, or their beliefs
- We sometimes expect them to do something – hopefully this response is a sale.

We assess the impact of our communication (that is, what response they give based on our communication) by listening to and assessing the response or feedback from the customer. That feedback may be silence that may indicate that they have not heard or are not interested, a smile or a shrug of the shoulders, or a verbal response. In any organisation, the outcomes of effective communication are essential ingredients of a positive organisational image, a positive environment, and satisfied customers.

When we communicate, we draw on a number of communication methods and forms. When giving information to a client, for example, we combine verbal and non-verbal methods of communication. We talk to the person and we make gestures. We may enhance our communication by showing an illustration or providing some data, or giving the person a brochure, or perhaps giving a demonstration. So we draw on verbal and non-verbal methods of communication. The verbal methods can be expressed in either written or oral forms, and the non-verbal method can be expressed in forms such as body language, graphic design, use of space, and sound.

Let's now look at some of the major forms of communication that we may use when delivering a service.

Use Effective Communication to Inform Customers about Available Choices for Meeting Their Needs and Assist in the Selection of Preferred Options

Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals

Oral Communication

By oral communication we mean not only talking, but also listening and watching. Communication implies a two-way process and so, while someone talks, another person listens. Effective listening is an extremely important quality in attempting to determine a customer's needs or wants.

- **Provide an Opportunity for the Customer to Confirm their Request**

Confirm customer satisfaction in two easy steps:

1. State what action will be taken
2. Ask a closed question to confirm agreement and understanding.

- **Question to Clarify and Confirm Customer Needs**

You need to use appropriate questioning techniques. There are five main types of questions:

1. *Open questions*

These are used to obtain more information, so you will get a longer answer, containing more detail. They usually begin with question words such as: how, why, when, who, what, where.

2. *Closed questions*

Closed questions usually lead to yes or no answers, or short specific answers from a customer. They are useful for obtaining accurate, detailed information. They are used to direct the customer or conversation. Closed questions do not encourage elaboration.

3. *Probing questions*

Probing questions are used to discover more details about a customer's needs. Probing questions are non-threatening, but encourage the customer to give greater detail.

4. *Reflective questions*

This type of question prompts your customer to start thinking about the benefits of your product or service. Reflective questioning helps establish the benefits of the product you are offering.

5. *Clarifying questions*

Clarifying questions are used to verify information you've received during the call. They ensure that you and the customer are in agreement. Clarifying

information with your customer also demonstrates how clearly you've identified and addressed their needs.

- **Seek Feedback from the Customer to Confirm Understanding of Needs**

Paraphrasing is an effective form of verbal feedback to use when listening, however it is not simply repetition or 'parroting,' but restating another person's statement in your own words to gain understanding. Use your own words to tell what you think the speaker meant, not what they said. Paraphrasing enables the listener to clarify the speaker's meaning and it conveys interest in what the speaker is saying and helps create a supportive environment for the conversation.

- **Summarise to Check Understanding of Customer Message**

At the end of the discussion, or at certain times during longer discussions, you can summarise what has been said covering the main themes and feelings. This acts as a check for both parties and helps to clarify any further misunderstandings and to keep the discussion on track.

Oral communication is about talking, about providing information, sharing ideas, and communicating feelings. If you do this effectively, you can ensure that the information can be put to good use by the organisation in ensuring that the service level is enhanced.

Active Listening

Listening is not simply hearing the words that someone says to you. Listening certainly involves hearing but it is a far more active process than that. It involves you as the listener participating through:

- Hearing the words
- Attempting to understand the meaning
- Providing feedback
- Seeking clarification.



- ✓ Communicate from the receiver's point of view
- ✓ Learn from feedback
- ✓ Use strategies for effective listening
- ✓ Overcome barriers to communication

The listening process also involves giving feedback both verbally and non-verbally. An active listener:

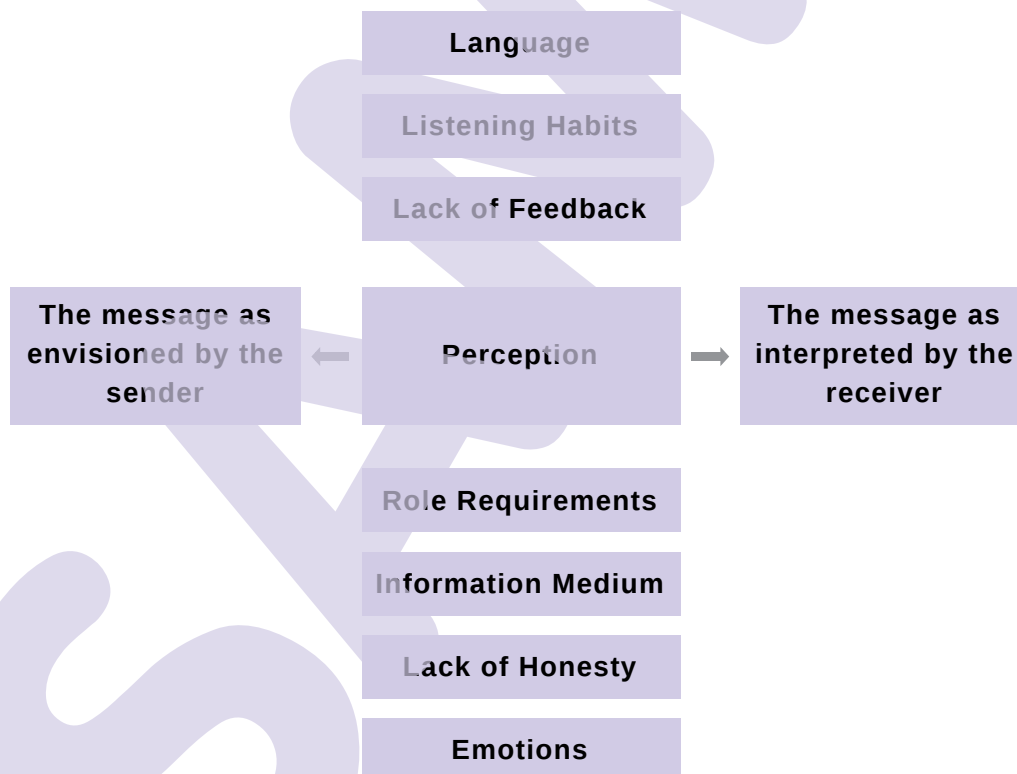
- Faces the speaker where culturally appropriate and maintains their full attention on what the speaker is saying
- Keeps regular eye contact with the speaker (looking away sometimes so as not to create discomfort by staring)
- Uses silence constructively, waiting until the speaker has gathered their thoughts or explained fully
- Does not constantly interrupt the speaker
- Notes the words used by the speaker and the feelings behind them
- Gives non-verbal cues — nods of encouragement, 'Mm' and 'Uh-huh'
- Follows up with clarifying and expanding questions relevant to what has been said
- Find a quiet place to communicate your message
- Directly face the other person and be at their level when you do this
- Use eye contact to show your interest
- Lean forward to them – this again shows you are interested in what they have to say
- Don't be too casual, it can show disinterest
- Always maintain interest – do not look away continually or fidget
- Try to imagine what the other person is saying
- Make a note of important points in your mind
- Nod or make affirming noises
- Summarise what has been said
- Be objective and do not cut off the speaker too much
- Avoid having preconceptions about what is being said
- Understand the message from the other person's point of view
- Listen to what is being said, not what you think is being said
- Watch the other party's body language, do not just listen to the words.

To be an effective listener, you have to see the world through another's eyes, to take the time to think how they are thinking.

It is common for people to now know how to really listen to a given message. People may think they are able to, but when it comes to the crunch they often just do not have the right skills. It is easy to let your mind wander or to start doing something entirely different. There are a range of blocks to listening, which we will look at here:

- *Rehearsing*: Thinking about what you are going to say while the other person is making their point – making it very easy to forget what they are trying to say
- *Anticipating*: Ignoring what they are actually saying because you are busy trying to imagine what they could say
- *Day-dreaming*: Thinking about something else related to what they are saying
- *Thinking you know what the person is like*: Based on the little information you have on them
- *Using your experiences to judge the person*: Finding a similar event in your life and basing your discussion on this
- *Derailing*: Butting in and changing the subject
- *Interrupting*: Listening very briefly and then butting in and interrupting with something that you think will help the discussion.

Some other barriers are presented in the diagram below:



Questioning

As we said earlier, there are five types of questions that can be used depending on the type of information we require or the type of communication process that we want to engage in:

- **Open Questions**

These are exploratory questions designed to give the person answering an opportunity to explain clearly and in detail about something that could be quite complex. 'How' and 'what' can be useful starting words for open questions.

"Sir, how can I help you today?"

"What do you think of the style of this item?"

"What specific needs do you need this product to address?"

Open questions could also be used to give people an opportunity to think out loud about ideas without getting too specific. Using only closed questions will result in a short, specific exchange. Open questions can generate far more information in a more conversational style.

- **Closed Questions**

These are questions designed to obtain specific, factual information.

"Do you have a copy of our latest catalogue?"

"What is your budget for this purchase?"

"What brand do you generally prefer to buy?"

- **Probing Questions**

These questions are not just about clarifying specific details, instead they dig much deeper than the surface. An effective probing question helps to get a person to talk about their personal opinions and feelings, and promotes critical thinking.

"What exactly did you mean by 'XXX'?"

"What, specifically, will you do next week?"

"Could you tell me more about YY?"

- **Reflective Questions**

Reflective questioning means that you take some information you gathered previously, and use it in a question. Reflective questions can work very well, because they show that you have been listening, and help you to focus on determining the exact needs of your customer.

"As you were talking to your customer earlier and asking questions, he said that he wanted to make sure his new leather jacket was good quality."

"You mentioned earlier that you wanted a good quality jacket - are you intending to wear it a lot?"

- **Clarifying Questions**

Clarifying Questions are simple questions of fact. They clarify the dilemma and provide the nuts and bolts so that the participants can ask good probing questions and provide useful feedback.

“Is this what you said...? “

“What resources were used for the project? “

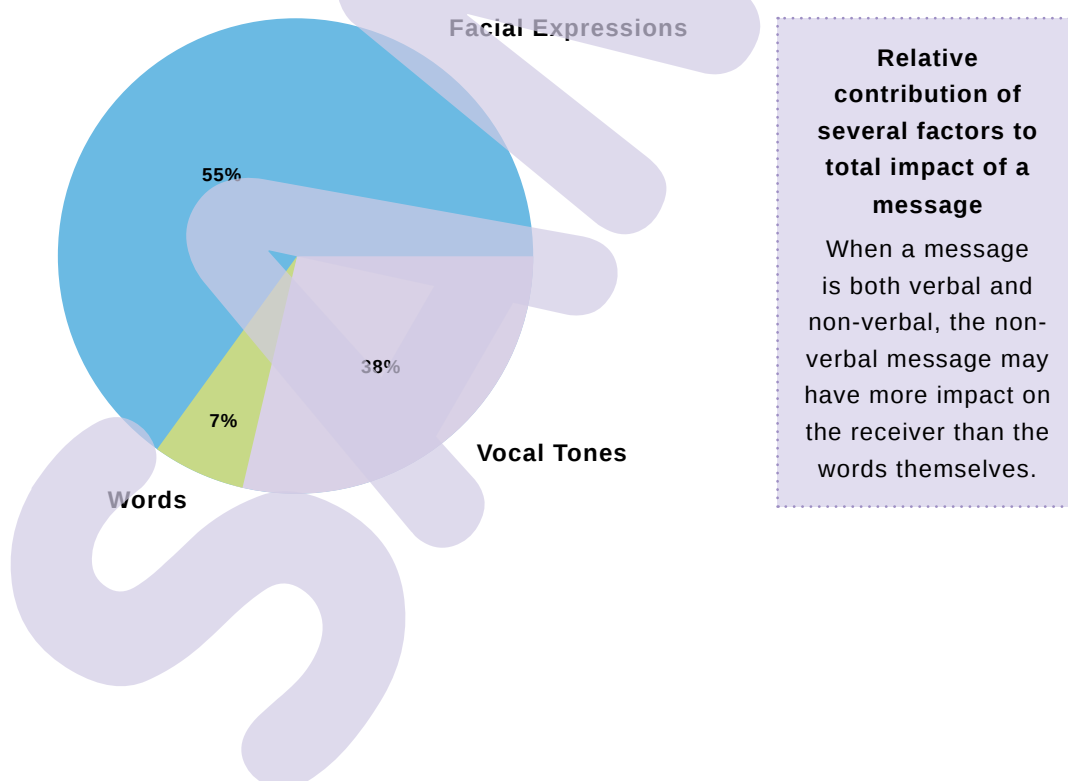
“Did I hear you say...?”

Non-Verbal Communication

Speaking and writing is just a part of the entire communication process. There is also the highly important area of non-verbal communication to consider. This area of communication accounts for a considerable amount of the information you are attempting to communicate – some studies have found it could be as high as 80% of all communication that is non-verbal in nature. You may have had experiences where you have been trying to say something and the words appear to be right – but the other person completely misunderstands what you are saying and you have to respond with:

“Yes, but that’s not what you really mean.”

The non-verbal messages you are giving just may be completely different to the actual words you are saying. This results in contradictions in the mind of the listener, causing them a lot of confusion about what is really trying to be said.



Non-verbal communication is sometimes called body language. In other words, the way we stand and move, the way we present ourselves, and where we place ourselves when communicating with different people. Some means of non-verbal communication or body language we all tend to use include:

- Facial expressions
- How we make eye contact
- Our appearance (clothing, hairstyle, make-up, jewellery)
- The way we use space and territory – for example, how close we stand to someone
- The use of gestures
- Our tone of voice.

Effective customer service is all about communication, and in particular about the way that you use questioning and listening skills to get your point across.

In order to improve the customer service:

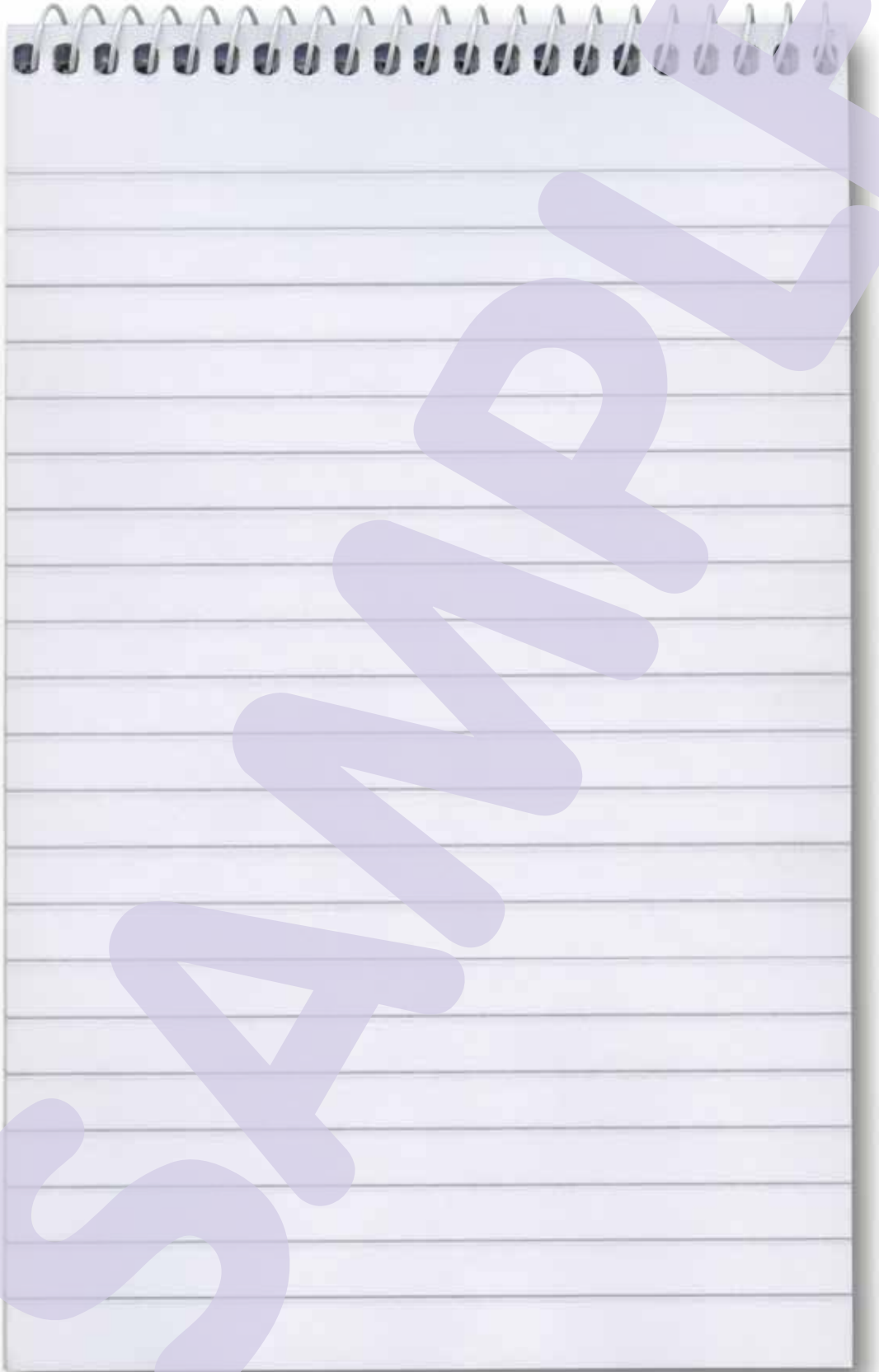
- Understand what is actually being said, not what you think is being said
- Take the information given and use it to adapt your service offering to meet their needs.

You will find that the process of retaining an existing customer by giving them good levels of service is much more cost effective than attempting to gain a new customer – which generally requires considerable levels of marketing and advertising to achieve (combined with sales promotions and service when in store).

Losing a customer has even higher implications for an organisation – unhappy customers are much more likely to tell others of their poor experience, and this may lead to perceptions of your organisation falling quite considerably!



Notes





Activity One – Do You Listen Actively?

For each of the following, describe your habits when listening.

Eyes

.....

.....

The Appearance of the Speaker

.....

.....

Facts or Big Picture

.....

.....

Facts or Emotions

.....

.....

Instant Judgement or Delayed Judgement

.....

.....



Trainer's Notes for Activity One

The Learner must have described appropriate behaviour for each area. Discuss the Learner's answer and suggest what improvements could be made.

Eyes – I maintain eye contact with the speaker.

The Appearance of the Speaker – I determine whether a speaker's ideas are worthwhile solely by their appearance and delivery.

Facts or Big Picture – I listen for the facts but concentrate on the big picture.

Facts or Emotions – I listen for the facts but emphasise with the emotion.

Instant Judgement or Delayed Judgement – I listen for both factual content and the underlying emotion.

Key Points Element 1



- In order to deliver service to your customers that meets their expectations – it is important that you are able to ascertain exactly what their needs are.
- You can identify customer needs by listening actively and asking appropriate questions.
- The needs of your customers should then be assessed for priority, and this should be used to ensure that customers are provided with the maximum amount of information to assist them in making an informed choice.
- Ensure that you are aware of any limitations in your service delivery so that you may use this to improve your skills.

Element 1 – ‘True’ or ‘False’ Quiz

		True	False
Q	The first stage in delivering strong customer service to your customers is to identify exactly what they need.	✓	
Q	It is not in your best interests to know everything about your customers' needs.		✓
	It is vital to you delivering an appropriate service.		
Q	Safety is not a consideration when delivering customer service.		✓
	You must always consider the safety of all concerned.		
Q	Customers come into a service situation with no preconceived expectations.		✓
	They always have certain expectations – it is your job to find out what they are.		
Q	Customers need to know that we appreciate their business.	✓	
Q	If you can communicate effectively, it becomes much simpler to ascertain what it is your customers want or need.	✓	
Q	When you communicate with a customer, there is no need for a response of any kind.		✓
	Feedback allows you to determine how well you are meeting the customer's needs.		
Q	All communication uses words.		✓
	Non-verbal communication uses no words.		
Q	Communication is a two-way process.	✓	
Q	Losing a customer is expensive.	✓	