



Candidate Resource and Assessment

BSBCUS201A

Deliver a Service to Customers



Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.

Focusing on your training needs



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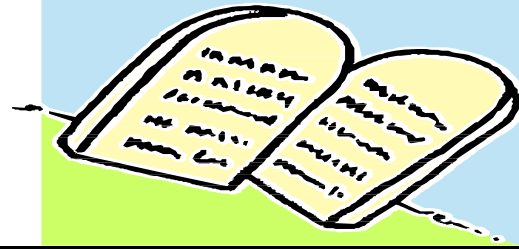
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"You're either part of the solution or part of the problem".

Eldridge Cleaver

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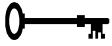
SAMPLE

Focus on

Your Area of Influence

Use considered risk taking in your 'grey' area

And others will follow you!

| | |
|---|--|
| Legend | This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page. |
|  | This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities. |
|  | Activity: Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action. |
|  | This symbol is used at the end of a section to indicate the summary key points of the previous section. |

Qualification Pathways



A goal without a plan is just a wish.

Antoine de Saint-Exupery

Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated candidates and business customers.

Qualification Rules

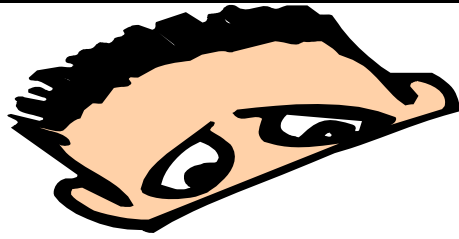
Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allows for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

Introduction



"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."

Gould, DiBella, Nevis

Introduction

This unit of competency is all about being able to deliver a service to customers, and monitor how well that service is being delivered. It will help you with the skills you need to demonstrate competency for the unit *BSBCUS201A Deliver a service to customers*. This is one of the units that make up the Certificates in Business.

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

1. **Establish Contact with Customers** – First we will examine how you should approach a customer in order to deal with them effectively.
2. **Identify Customers' Needs** – next 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.
3. **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.
4. **Process Customer Feedback** – 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 completion of the assessment and being deemed competent, you will have demonstrated your ability to identify customers' needs and monitor a service provided to customers.

SAMPLE

BSBCUS201A/01
Establish Contact with Customers



"The most valuable of all talents is that of never using two words when one will do."

Samuel Jefferson.



Acknowledge and greet customer in a professional, courteous and concise manner according to organisational requirements

Maintain personal dress and presentation in line with organisational requirements

Communicate using appropriate interpersonal skills to facilitate accurate and relevant exchange of information

Maintain sensitivity to customer specific needs and any cultural, family and individual differences

Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements

Positive Customer Contact

In customer service, first impressions count for a lot! They are very important to your ability to provide top quality customer service. A key feature of first impressions is the way you introduce yourself to clients and potential clients. Your verbal and non-verbal communication must complement the professional viewpoint that you are trying to portray to your customers. In doing this you must consider the words you use, your posture, facial expressions, your use of eye contact and gestures.

All of these need to match each other. When your non-verbal communication cues (such as posture, gestures and facial expressions) and verbal communication contradict each other, it is generally the non-verbal message, not the spoken word that makes the greatest impact. Therefore it is crucial that you get your non-verbal cues right. When thinking about the way you establish contact with your customers you should consider how you usually go about introducing yourself to clients and creating a good impression of the services your organisation offers.

- What impression do you want to make?
- How will you make this impression?
- What organisational image do you want to convey?
- How will you convey this?
- Are there any organisational policies and/or procedures or codes of conduct about how to greet clients? If so, review these.
- What is important to say to the client?
- What information do you give them about yourself?
- What information do you ask of them?

Whenever we are communicating with others, we will draw on a number of different communication methods and channels. We might draw on verbal communication to give our message across; however we might also use visual communication methods, showing them a product, looking through a catalogue or brochure. Non-verbal communication is always present; however we can use it to our advantage helping build up rapport with our customers.

The table below outlines the three key communication channels and outlines their use in customer service.

| | |
|-------------------|---|
| Spoken | Person to person permits two way discussion, it is generally very rapid, and allows each party to receive immediate feedback. It allows a chance for questions to be asked immediately. |
| Written | Written communication is usually more appropriate where exactness is desired. Where a permanent record is required of the communication or where the recipient is at some distance geographically or organisationally from the sender. |
| Non verbal | We will examine non-verbal communication in detail in a later section. |

Verbal Communication

Essentially verbal communication is talking, but we can also incorporate aspects of listening and watching. Communication is always a two way process, we send a message, it is received by the other party and feedback is provided. Because of this, while the other party is talking, it is crucial that we are listening and watching what they are doing. By listening and watching, we can pick up the message and ensure that we understand it. It also allows us to ensure that we understand their mood and attitudes through looking at their non-verbal communication cues.

Effective Listening

Some people, regardless of their efforts, always seem to have trouble listening. Others have no problems at all. What accounts for the difference? There are eight key areas, where you should examine yourself, to determine whether or not you have strengths and weaknesses with regards to listening habits.

1. **Deciding in advance that the subject is uninteresting:** Those with strong listening skills may find the subject boring, but decide to accept the challenge by making the most of the situation. Instead of finding alternative activities, they focus on the speaker's message, and determine how to get something from the communication.
2. **Focusing only on the facts:** Strong listeners look for the main ideas, the theme that keeps coming back, again and again and again in the speaker's message. Without it, the isolated facts do not make any sense. Once the sense of the message is found, the facts will be remembered as logical supporting evidence.

3. **A tendency to outline everything:** It is a strength if you are just able to sit back, and listen to the entire message being presented, then write down the main points. This is the approach most listening experts agree works best.
4. **Pretending to pay attention:** Listening is hard work. It is not a passive encounter – it requires energy and attention. The strong listener not only hears effectively but observes the non-verbal signals of the speaker, all of which adds up to a real understanding of what is being said.
5. **Allowing distractions to interfere:** Effective listeners try to control their environment by screening out distractions. They choose a quiet place to listen, refuse phone calls, and close their office doors to avoid intruders. They may ask someone to talk louder or softer, or give non-verbal cues for louder please.
6. **Avoiding difficult material:** The strong listener, occasionally seeks out the difficult subjects to challenge their listening skills. These individuals are determined not to let a complicated topic from getting the better of them. They typically spend time watching challenging television, or reading challenging books.
7. **Responding emotionally to certain words or phrases:** Strong listeners examine those words and phrases that tend to have an emotional impact on them. By doing so they become more adept at controlling their own emotions. Awareness of this problem helps the good listener conquer this weakness.
8. **Daydreaming because of the difference between speech speed and thought speed:** Effective listeners also find something to fill in the extra time but they remain tuned in to the speaker, and spend the extra thoughts on material related to the talk. They may make mental summaries of the key points, or try to read between the lines. It is a strength to mentally reinforce what the speaker is saying, and this will lead to a more lasting memory forming of the speech.



Activity Two


Briefly describe your listening strengths and weaknesses.

Rapport

Rapport is the ability to develop an effective relationship with your customers. Delivering customer service effectively is one of the most important tasks you can do whilst understanding your job. In this section, we will look at how you can attempt to improve the attitudes that you implement in order to improve your overall ability to establish rapport with your customers.

Essentially you should attempt to make your attitude the same whether you are dealing with your employer, other staff or your customers. Whether you are answering the phone, talking in person or writing a letter or email, look to always provide service in an efficient and effective manner.

A person who can provide excellent customer service in an organisation is often difficult to find. In the following activity we will list all of the attributes that a very special customer service representative will possess. It is your task to look through these and attempt to determine which you feel is the most important.




Activity Three

Below is a list of attributes someone employed in customer service should possess. Tick the five that you feel are most important. Be prepared to discuss why you feel these are the most important attributes to hold.

| | | | |
|----------------------------|--------------------------|------------------------|--------------------------|
| Eager | <input type="checkbox"/> | Well presented | <input type="checkbox"/> |
| Composed | <input type="checkbox"/> | Enthusiastic | <input type="checkbox"/> |
| Interested in the customer | <input type="checkbox"/> | Confident | <input type="checkbox"/> |
| Assertive | <input type="checkbox"/> | Positive | <input type="checkbox"/> |
| Friendly | <input type="checkbox"/> | Helpful | <input type="checkbox"/> |
| Innovative thinker | <input type="checkbox"/> | Patient | <input type="checkbox"/> |
| Non-judgemental | <input type="checkbox"/> | Have a sense of humour | <input type="checkbox"/> |
| Honest | <input type="checkbox"/> | Committed | <input type="checkbox"/> |
| Diplomatic | <input type="checkbox"/> | Courteous | <input type="checkbox"/> |
| Hard Working | <input type="checkbox"/> | Tolerant | <input type="checkbox"/> |
| Sincere | <input type="checkbox"/> | Tactful | <input type="checkbox"/> |

Finding an individual who possesses all of these attributes is probably slightly unrealistic. However when you look through this list again, think if there is anything that is actually extraordinary? There isn't, these are just the general qualities that a good employee should have. It is a description of a pleasant and confident individual who is interested in helping people. This is the essence of good customer service.



Activity Four

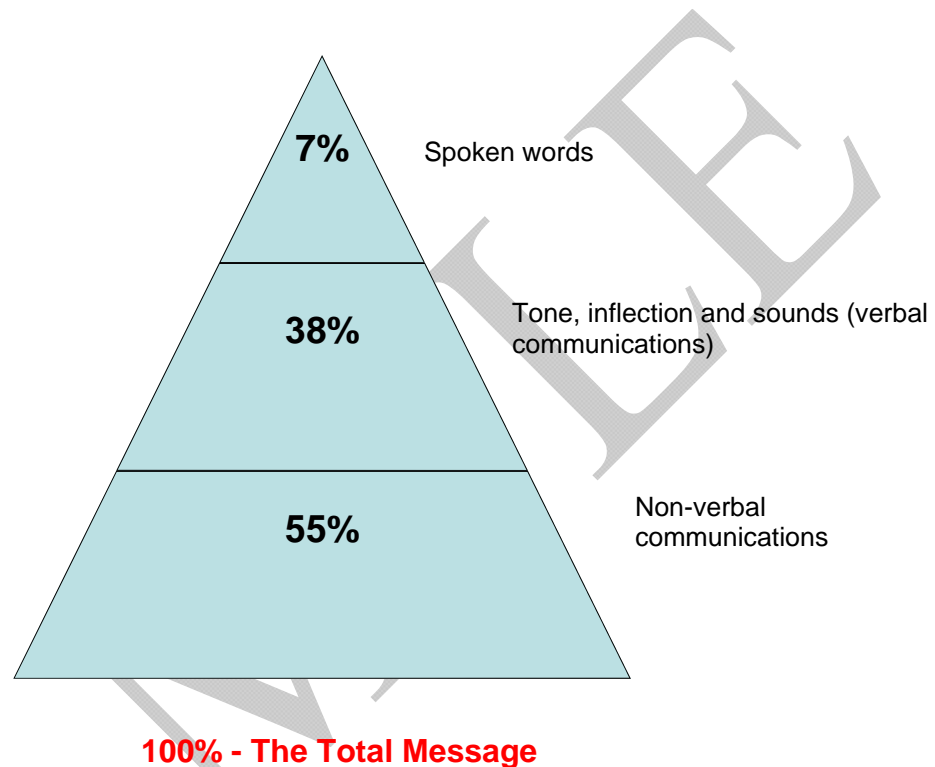
How do you stack up? Place a tick next to each attribute you believe you exhibit and a cross next to each you feel you need to work on. You do not need to discuss this with the group, however keep this for your assessment.

| | | | |
|----------------------------|--------------------------|------------------------|--------------------------|
| Eager | <input type="checkbox"/> | Well presented | <input type="checkbox"/> |
| Composed | <input type="checkbox"/> | Enthusiastic | <input type="checkbox"/> |
| Interested in the customer | <input type="checkbox"/> | Confident | <input type="checkbox"/> |
| Assertive | <input type="checkbox"/> | Positive | <input type="checkbox"/> |
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| Diplomatic | <input type="checkbox"/> | Courteous | <input type="checkbox"/> |
| Hard Working | <input type="checkbox"/> | Tolerant | <input type="checkbox"/> |
| Sincere | <input type="checkbox"/> | Tactful | <input type="checkbox"/> |

Communication

It is probably fair to say that the majority of problems that your customers are likely to face when dealing with you in a customer service role will come back to communication and the skills you use in face-to-face communication.

Service providers who have to deal with customers face-to-face have more to take into account than just the words that you use. The vast majority of a message is conveyed through non-verbal communication. The diagram below shows how much of your message is conveyed through different means.



As you can see non-verbal communication covers about 55% of how a message is received by an individual. We will look at a number of aspects of communication and how this can be used to build a rapport with your customers to improve relations with them.

Eye Contact

Crucial to a successful greeting with a customer is eye contact. Making direct eye contact with a customer:

- Acknowledges the customer's presence.
- Shows that the service provider will give the customer their undivided attention.
- Shows that the customer will be dealt with as quickly as possible.

Direct eye contact is also a sign of someone who is honest and eager to help. Think about your dealings with those who do not provide direct eye contact. They are often perceived as being dishonest, or shifty. However remember that when making eye contact there is a very fine line between two little and too much. Too much eye contact can make customers feel uncomfortable.

Gestures

Another crucial part of providing good service, and communicating with your customers in an effective way is gesturing. Gesturing is normally just something that happens. However it is important that you make a conscious effort to make the right gestures. Do not just let them happen. Gestures allow you to express sentiments directly to your customers. They can welcome a customer, or make them feel comfortable. An open and positive gesture helps you in giving a positive greeting to the customer. Using open arms, with palms turned upwards encourages those who are dealing with you.

However, closed gestures such as having your arms crossed or your hands clenched up or in your pockets can give the opposite message - stay away from me, I do not want to help you. This is something that can set you apart from other service providers. Making a conscious effort to provide open gestures.

Personal Space

You will find through experience that each customer has their own comfort zone with regards to how comfortable they feel when dealing with you as a service provider. The amount of distance between you and the customer directly influences the customer's perceptions of the service provider.

A person's comfort zone depends on a wide range of factors. Where they grew up may play a significant role. Those who grew up in a city are used to having people standing close to them, one metre is regarded as acceptable, however those who grew up in rural areas may require a larger zone around them to feel comfortable.

The best method of determining a customer's comfort zone is to stand approximately one arm's length away from them. Note if the customer backs away. This allows the customer to determine how close *they* wish to stand to *you*.

Physical Contact

Making a certain amount of physical contact with your customers is crucial to developing a rapport with them. Handshaking, placing a hand on the customer's elbow, upper arm or shoulder may all be appropriate. Determining what is appropriate and inappropriate can be quite difficult as it varies from customer to customer quite widely.

The general approach is to consider a handshake as the minimum and then to look for further opportunities for a slight additional contact. But in this case the rule is "less is best".

Demonstrating Interest

An excellent way of building rapport with your customers is to show real interest in what they are saying. As a customer service provider, you must show your customers that you are interested as you listen. It is a courtesy that when your customers are talking you should be listening. You should also remain silent, so that the message gets through. As the customer is speaking, you should indicate that you are listening and understanding what they are saying through nodding your head.

If the customer continues speaking, for a long time, you should add some sounds such as:

- "Uh huh"
- "I see"
- "Mmm hmmm"
- "I am with you"

These types of sounds and statements allow you to listen and show involvement with the customer without interrupting. They ensure that the customer feels like you are listening and interested in what they are saying.

Personal Presentation

The way you present yourself, both verbally and non-verbally, communicates an image of your organisation to others and contributes to people's perception of the quality of the organisation's service environment. In this section we focus on the non-verbal aspect of presentation. The image that you present is constructed from your appearance, dress, manner, communication style and attitude. Some organisations will be prescriptive about presentation and others may be more relaxed. This will depend to a large extent on the type of organisation, its purpose, its clientele and the type of work conducted.

Regardless of the kind of position you are working in, you will want to take a minute to consider how you will dress for work. In general, you will want to dress to fit the culture of the organisation to which you are working. For some employers, a suit will be required and for others 'business casual' may be acceptable. A good guideline to follow is to dress as others do in the same occupation. If in doubt, it does not hurt to ask a human resources staff member what they consider appropriate attire for working, your policy and procedure manuals may also provide guidance.

Dress codes

People can present themselves in a particular way to convey a particular image. A person's appearance, clothes, jewellery and hairstyle can convey messages about:

- Age
- Occupation
- Gender
- Social status
- Professionalism
- Financial circumstances
- Ethnic background
- Mood
- Personality

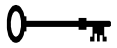
It is possible to manipulate your appearance to come up with variations on an image to convey different messages for different occasions. Many organisations have uniforms that present a particular corporate image or have a particular function. Other organisations insist on a particular style of dress for their employees and managers. Rather than uniforms, they may use a dress code which is a set of rules or conventions that state what is appropriate to be worn. The code may even specify colours and styles. Other organisations are not so strict about their workers' dress and would expect that they dress appropriately based on what they observe others wearing and what they feel comfortable in. In some instances dress codes are not communicated directly.

Remember, that a first impression is a lasting one. It is usually better to dress and appear more conservative than not when first beginning work due to the seriousness of the occasion. It may be helpful to get feedback on your attire beforehand from trusted friends or others in similar occupations.

In a business situation, women should wear a simply tailored suit or dress, conservative nail polish and lipstick, and have a neat hair style. Flashy earrings should be left at home and perfume and makeup should be used in moderation. In general, it is better to err on the side of tradition as some organisational cultures may still have a preference for knee length skirts.

Men should wear a clean, pressed, conservative suit with a non-flashy shirt and tie. Have your shoes shined and wear plain socks. Have your hair neat and trimmed. Long hair, pony tails and extremely long side burns should also be neat and tidy. Also, facial hair should be neatly trimmed. Do be sure to pay attention to the small details, such as cleaning and trimming your fingernails and choosing conservative watches and jewellery. Be sure to use only a moderate amount of cologne.

SAMPLE



Key Points Section 1

- Communication is the process of imparting information, facts, ideas, feelings and courses of action through messages. This may take the form of written words, spoken words or even gestures.
- Communication involves a sender sending a message to a receiver. The receiver may then provide feedback on this message.
- When deciding what method of communication to use you should think about who you're communicating with, why you are communicating, if a record is required and how quickly a response is needed.
- Asking the right questions and listening actively can assist you in ensuring that you fully understand a message.
- Non-verbal communication includes gestures, facial expressions and body language. Non-verbal communication can be either positive or negative.
- Feedback on communication should be encouraged to ensure all parties are fully aware of what the message was.
- Personal presentation is vital. A well presented employee makes a good impression on customers and they are likely to think of the company in a professional way.



Section 1 - 'True' or 'False' Quiz



| | | |
|----------|----------|---------------------------------|
| T | F | Communication is mostly verbal. |
|----------|----------|---------------------------------|



| | | |
|----------|----------|---|
| T | F | First impressions don't count for much in retail. |
|----------|----------|---|



| | | |
|----------|----------|---|
| T | F | You often first greet new customers over the phone. |
|----------|----------|---|



| | | |
|----------|----------|---|
| T | F | When greeting a customer over the phone you should never say your name. |
|----------|----------|---|



| | | |
|----------|----------|--|
| T | F | Good service providers are good communicators. |
|----------|----------|--|



| | | |
|----------|----------|-------------------------------------|
| T | F | Communication is a one way process. |
|----------|----------|-------------------------------------|



| | | |
|----------|----------|--|
| T | F | Spoken communication is usually more appropriate where exactness is desired. |
|----------|----------|--|



| | | |
|----------|----------|--|
| T | F | Only managers should consider their personal appearance. |
|----------|----------|--|



| | | |
|----------|----------|--|
| T | F | It is a strength if you are just able to sit back, and listen to the entire message being presented. |
|----------|----------|--|



| | | |
|----------|----------|--|
| T | F | Uniforms are used to present a particular image for an organisation. |
|----------|----------|--|