



Candidate Resource and Assessment

BSBCUS301A

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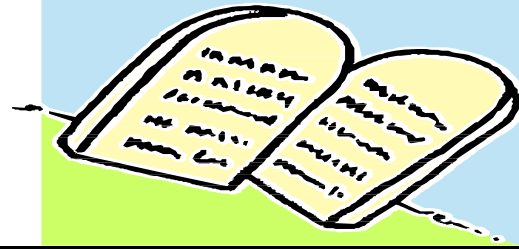
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"You're either part of the solution or part of the problem".

Eldridge Cleaver

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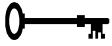
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Focus on

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 that meets the stated needs of nominated Candidates and business customers.

Qualification Rules

Qualification requirements include core and elective units. Specific unit of competency requirements that are stated in the qualification description determines the unit mix. 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 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 *BSBCUS301A Deliver and monitor a service to customers*. This is one of the units that make up the Certificates in Business.

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

1. **Identify Customers' 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.

SAMPLE

BSBCUS301A/01
Identify Customers' Needs



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

Samuel Jefferson.



Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations

Assess customer needs for urgency to determine priorities for service delivery in accordance with organisational requirements

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

In this training, we will be examining how you should go about delivering service to your organisation's customers and clients. The first stage in delivering strong customer service to your customer is to identify exactly what they need. Getting to know your customers and their needs is crucial to success in customer relations.

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 customer's 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; and
- Their requirements.

When you are thinking about your customers it is important to recognise that all customers essentially have six basic buying needs pertaining to a service:

1. **Safety:** Will the service be safe, and not put anyone in any type of harm?
2. **Performance:** Will they get what they expect from the service being offered?
3. **Appearance:** While this is more applicable to products, services also may have appearances. How do you look? Are you presentable? Do you sound good on the telephone?
4. **Comfort:** Is the customer comfortable with the service being offered? Do they have any reason not to be?
5. **Economy:** How cheap is the service in relation to its competitors and what is being offered?
6. **Durability:** Will the service provided last, or will they need to have the service performed again and again?

Finding out which buying needs are most important to your customers will allow you to match these needs to the benefits of your services.

Customer Expectations

An important part of customer service is meeting customer expectations. All of your customers are likely to have differing needs and wants that they wish to have fulfilled. These are known as expectations. That is what they want the service to give them. The importance of these expectations may vary, depending on the type of service that they want to have. Some common expectations that your customers may have include:

- **Your customers will expect a good level of service.** This will of course vary depending on the nature of the purchase. Someone buying something for \$2 is likely to want less service than someone buying a car for example.
- **Price is becoming an increasingly important factor in determining a purchase of a service (or product) from a business.** Price cutting is common – although in some cases can be detrimental to small businesses where low price may be synonymous with low quality. This is of course different if you are a discounter. Alternatives to price cutting can include ‘value adding’ (can you add value to your products or services to make your business more competitive?).
- **Customers have expectations of quality and durability.** They are less likely to question price if they are doing business with a company that has a reputation for quality.
- **Customers need action when a problem or question arises.** Everyone has a need for recognition and likes to be treated as a ‘priority’.
- **Customers need to know that we appreciate their business.** Saying ‘thank-you’ through words and actions is a good starting point. Let customers know that you are glad they have chosen to do business with you - this conveys a positive message and encourages them to come back.

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:

- Become familiar with your customers and establish trusting relationships with them.
- Ask your customers what their expectations are.
- Live up to their expectations and plan to exceed them whenever possible.
- Be consistent and courteous when serving your customers.

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, whether that feedback is 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.

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.

By talking we provide information, ideas and feelings. By questioning we seek information. We respond to someone talking and provide them with feedback. The messages are enhanced with appropriate body language. The slightest shift in posture or expression can convey 'messages'.

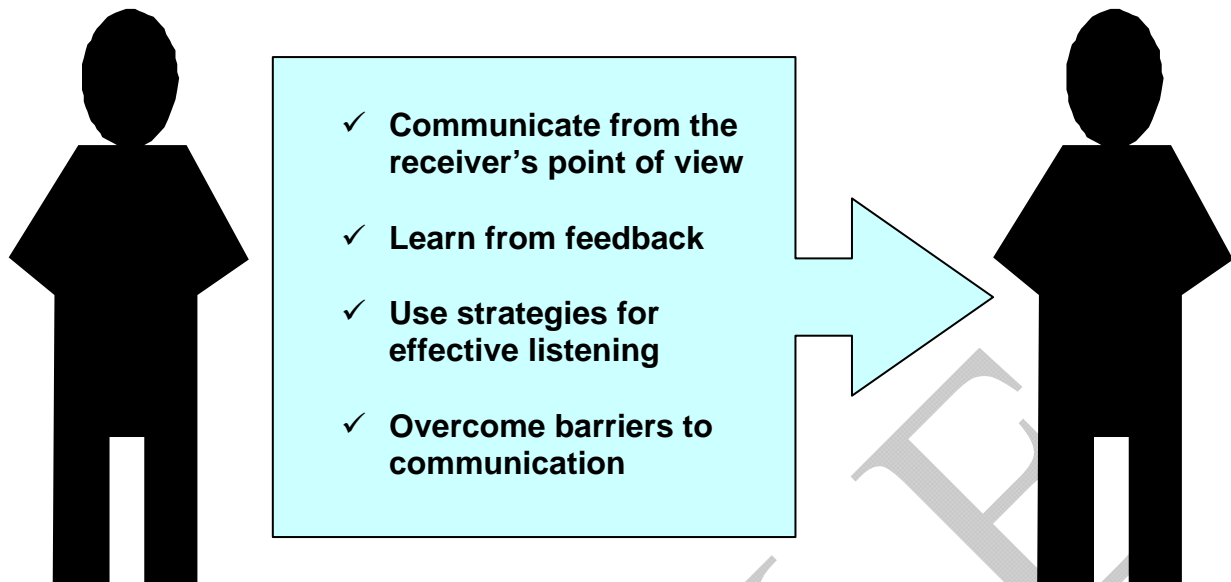
Active Listening

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.

The listening process also involves giving feedback both verbally and nonverbally. 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 nonverbal cues — nods of encouragement, 'Mm' and 'Uh-huh'.
- Follows up with clarifying and expanding questions relevant to what has been said.



Techniques for Active Listening with Customers

In order to listen well you need to concentrate. The following may help:

- Make sure it is not too noisy to hear what is being said.
- Sit or stand so that you directly face the person who is speaking where appropriate.
- Maintain eye contact if appropriate.
- Don't be too relaxed; lean forwards a little or sit towards the edge of your seat to indicate interest.
- Don't do anything else while you are listening like shuffling papers or looking for something.
- Visualise what the person is saying.
- Make a mental note of key words and phrases (and use them in response).
- Use affirmative and encouraging responses like nods, 'mm...' or 'aha...'
- Summarise what the person has said from time to time to reassure them that you understand and to check your own understanding.
- Be receptive, be objective and willing to hear what someone else has to say.
- Guard against preconceived notions based on race, sex, age or accent.
- Strive to understand, as though you were in the person's shoes.
- Listen to what people are actually saying, not to what you think they should be saying.
- Listen to the words and the vocal tone and watch the body language, if you are having a face-to-face conversation.

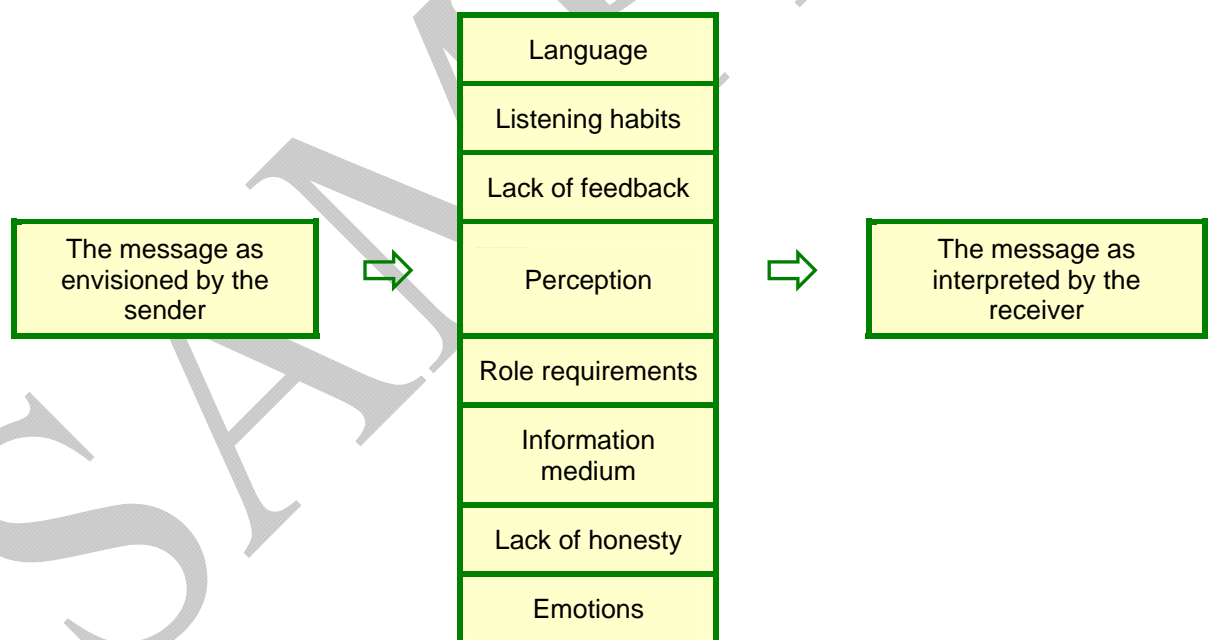
To be an effective listener, you have to see the world through another's eyes, to take the time to think how they are thinking.

We do not always listen effectively. Sometimes we become distracted or our minds wander. We allow our own interests or concerns to get in the way of concentrating on what the other person is saying.

Typical blocks to effective listening are:

- **Rehearsing:** Working out in your own mind what you are going to say next while the other person is talking.
- **Anticipating:** Anticipating what the other person is going to say next rather than focusing on what they are presently saying.
- **Day-dreaming:** Allowing what you hear to trigger your own thoughts, imaginings or day dreams.
- **Pre-judging** the person as not worth listening to, not right or doesn't know.
- **Filtering** what the other person is saying through your own experience, sometimes comparing their experience with yours.
- **Derailing:** Changing the subject so that you talk about what you are interested in.
- **Interrupting:** Listening to the first few sentences, then cutting in with advice, solutions, your comparable experience or 'yes, but...' rather than hearing the other person through.

Some other barriers are presented in the diagram below:



Questioning

There are three 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:

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?”

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.

Hypothetical Questions. These questions set a scene that could happen and give people an opportunity to answer as if it had happened. They can also be an excellent way of engaging people’s imagination in developing creative solutions.

“If we take the example of...”

“What would happen if...”

Questions to avoid are **Double or Triple-barrelled Questions** and **Leading Questions**. Double or triple barrelled questions refers to using one sentence containing two or three questions within it, such as:

“How do you do and what can I get you and why do you want it?”

“Can you tell me your name, your address and your telephone number please?”

These are all valid questions but the customer may become confused trying to keep them in mind or deciding which one to answer first. Chances are they will ask for the question to be repeated. Better to take the sections one by one.

“Can you tell me your name please?”

“What is your address?”

“Finally what is your telephone number?”

Leading questions state the answer in the question and restrict the response of a person:

“When customers look for a new widget they generally want something that is affordable and durable, is that what you want too?”

Here there is little opportunity for the person to explain their factors leading to purchase for themselves. The answer is already stated in the question. It is easier to agree than to try to sort out what is correct and what isn’t, so a person is led to answer ‘yes’ even if that isn’t the way they do things. The question could be rephrased as an open question:

“In looking at new widgets, what do you look for?”

Leading Questions contribute to fuzzy communication, don't address the issue directly and can leave people feeling cornered or uncomfortable. Sometimes you may want to use leading questions to introduce an idea or suggestion of your own. Leading questions can be useful as a way of moving a discussion towards resolution.

"I think you should consider this solution, don't you?"

"This product would work, wouldn't it?"

Some final tips about questioning before we move on:

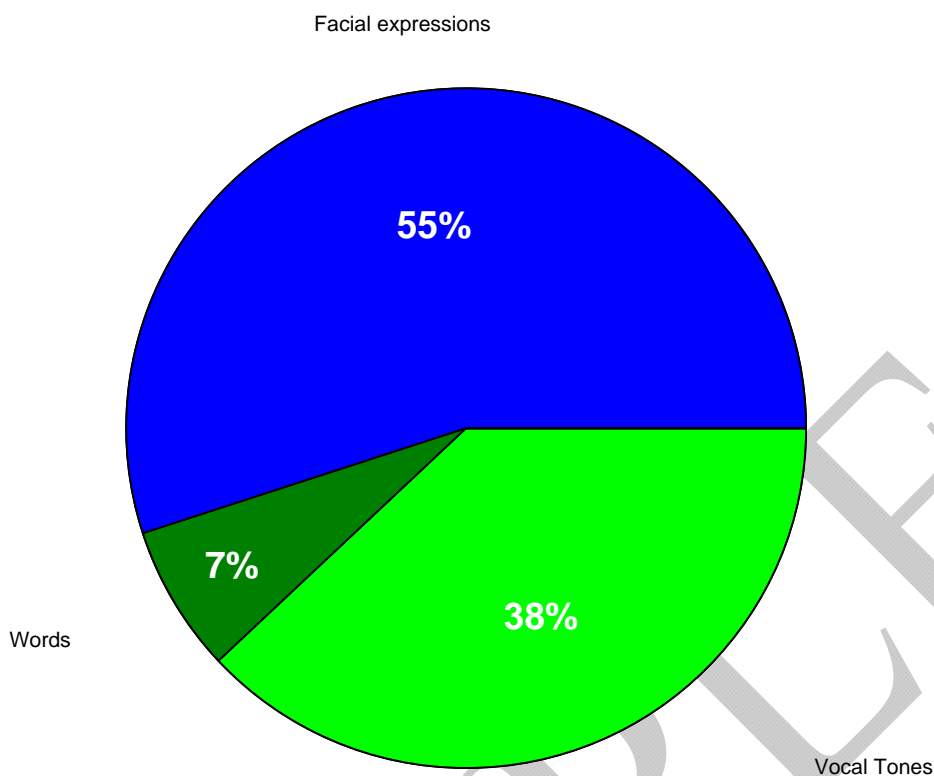
- Be respectful (includes cultural sensitivity).
- Avoid sarcastic or inappropriately personal questions.
- Keep questions simple.
- Ask one question at time.
- Leave thinking time after you have asked a question.
- Actively listen to people's response.
- Clarify responses if required.

Non-Verbal Communication

There is much more to communication than speaking and writing. It could be argued that most of communication is in fact non-verbal. Something like 80 per cent of what we communicate is passed non-verbally. We may notice the power of non-verbal communication when a listener responds to our words with:

"Yes, but that's not what you really mean".

In this case, the listener has received a contradictory non-verbal message: that is, the spoken message and the non-verbal clues that accompanied it were not in accord. If we say that we are happy to see someone while we are frowning, or if we insist that we are well when we have turned pale, or that we are telling the truth with head lowered and body slouched, then the message is contradictory. Generally it is the non-verbal message, not the spoken word that is believed in such cases.



Relative contribution of several factors to total impact of a message

When a message is both verbal and nonverbal, the nonverbal message may have more impact on the receiver than the words themselves.

Non-verbal communication is sometimes called body language. In other words, the way we stand and move, the way we present ourselves, 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 expression.
- How we make eye contact.
- Our appearance (clothing, hair style, 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.

In the smartest organisations, asking questions and listening carefully to the answers is an important part of customer service. These firms train their employees to focus on what the customer is saying, and then tailor products or services to meet customer needs. Focussing on what's on the customer's mind is the smartest thing a company can operate. It allows you to determine exactly what it is that the customer wants and you can then target your response to those needs.

Servicing your existing customers effectively and retaining them is also cheaper than attracting new customers. According to research up to 65% of a company's business comes from existing customers, and it costs five times as much to attract a new customer than to keep an existing one satisfied. This means that looking at what it is your customer wants is crucial.

Losing a customer is even more expensive. According to some recent studies 91% of unhappy customers will never buy again from a company that has displeased them and will also voice their dissatisfaction to at least seven other people. If you want to be successful in customer service, you must listen to and talk with customers as well. There is no substitute for getting out and learning from the customers themselves how you might serve them better.



Activity One – Do You Listen Actively?

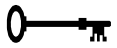
For each of the following questions, tick the answer that best describes your listening habits.

		Usually	Sometimes	Seldom
1.	I maintain eye contact with the speaker.			
2.	I determine whether a speaker's ideas are worthwhile solely by their appearance and delivery.			
3.	I try to align my thoughts and feelings to those of the speaker.			
4.	I listen for specific facts rather than for the big picture.			
5.	I listen for both factual content and the underlying emotion.			
6.	I ask questions for clarification and understanding.			
7.	I withhold judgment of what the speaker is saying until they are finished.			
8.	I make a conscious effort to evaluate the logic and consistency of what is being said.			
9.	While listening, I think about what I am going to say as soon as I have a chance.			
10.	I try to have the last word.			

Scoring for Activity One

For questions 1, 3, 5, 7 and 8, give yourself 3 points for usually; 2 points for sometimes and 1 point for seldom. For questions 2, 4, 9 and 10, give yourself three points for seldom; 2 points for sometimes and 1 point for usually. Then add up your total points.

A score of 27 or more means that you are a good listener. A score of 22 to 26 indicates you have some listening deficiencies. A score of 22 or less indicates that you have developed a number of bad listening habits.



Key Points Section 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 the limitations in your service delivery so that you may use this to improve your skills.

SAMPLE



Section 1 - 'True' or 'False' Quiz



T	F	The first stage in delivering strong customer service to your customer is to identify exactly what they need.
----------	----------	---



T	F	It is not in your best interests to know everything about your customers needs.
----------	----------	---



T	F	Safety is not a consideration when delivering customer service.
----------	----------	---



T	F	Customers come into a service situation with no preconceived expectations.
----------	----------	--



T	F	Customers need to know that we appreciate their business.
----------	----------	---



T	F	If you can communicate effectively, it becomes much simpler to ascertain what it is your customer's want or need.
----------	----------	---



T	F	When you communicate with a customer, there is no need for a response of any kind.
----------	----------	--



T	F	All communication uses words.
----------	----------	-------------------------------



T	F	Communication is a two way process.
----------	----------	-------------------------------------



T	F	Losing a customer is expensive.
----------	----------	---------------------------------