



# Candidate Resource and Assessment

**BSBCUS401A**

## Coordinate Implementation of Customer Service Strategies



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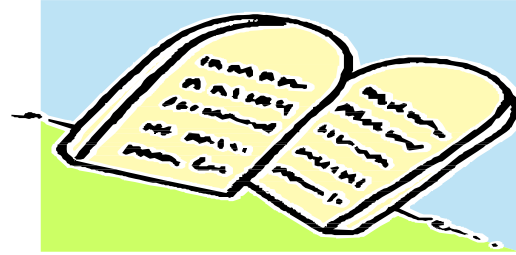
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**"You're either part of the solution or part of the problem".**

**Eldridge Cleaver**

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## Focus on

### Your Area of Influence

Use considered risk taking in your 'grey' area

## And others will follow you!

|   |  |
|---|--|
| <b>Legend</b>   | 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.               |
|  | <b>Activity:</b> 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 all about being able to coordinate the implementation of customer service strategies in your workplace. It will help you with the skills you need to demonstrate competency for the unit *BSBCUS401A Coordinate the implementation of customer service strategies*. 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. **Advise on Customer Service Needs:** First we will examine the process of examining what customers want and how you can provide customer service advice to your organisation.
2. **Support Implementation of Customer Service Strategies:** Then we will examine how you go about selecting customer service strategies and ensuring you have planned their implementation to ensure it goes smoothly.
3. **Evaluate and Report on Customer Service:** In the final section we will examine how you can monitor the performance of your customer service staff and look for ways of improving overall performance.

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 advise on, and carry out customer service strategies, and evaluate customer strategies on the basis of feedback and design strategies for improvement.

SAMPLE

**BSBCUS401A/01**  
**Advise on Customer Service Needs**



**"It's not the situation ... It's your reaction to the situation."**

**Robert Conklin**



**Clarify and accurately assess customer needs using appropriate communication techniques**

**Diagnose problems matching service delivery to customers and develop options for improved service within organisational requirements**

**Provide relevant and constructive advice to promote the improvement of customer service delivery**

**Use business technology and/or online services to structure and present information on customer service needs**

In business, we all need customers. They are the life blood of our business - providing us with the income that we need to survive. In order to ensure that we are able to get and more importantly maintain our customer base, it is vital that we have in place a solid set of customer service policies and procedures. You have probably heard many, many times of the importance of customer service to an organisation, but what exactly is customer service?

Customer service is the set of activities and programs that is undertaken by an organisation to make the experience more rewarding for your customers. These activities will increase the value customer's receive from the merchandise and services that any organisation provides. All employees of an organisation and all elements of the organisation provide service that increase the value of the merchandise of services provided. Think for a moment about a typical retailing organisation...

The shop assistants ensure that the customers get what they want, the staff in the distribution centre make sure that merchandise is in stock, management ensures that staff are trained and are able to best serve the customers, advertising staff ensure that the public is aware of what is on offer in the store.

As you can see, it is just not the front line staff who have responsibilities with regard to customer service; members of staff right through an organisation have responsibilities. There are three major steps in providing excellent customer service, and we will examine each of these in detail throughout this manual.

| <b>The Steps to Effective Customer Service</b>   |
|--|
| <b>Begin by determining exactly what your customer's needs are.</b>                              |
| <b>Then set about developing and implementing strategies to ensure that their needs are met.</b> |
| <b>Finally, monitor the service provided.</b>  |

As a manager in a service organisation, you will play a crucial role leading those who provide service to your customers. In particular, you are responsible for determining customer needs, supporting the implementation of service strategies and reporting on customer service. Each of these three topics will be the subject of a chapter in this manual.

### **Internal and External Customers**

Let's begin our exploration of customer service by looking at the types of customers that you may be asked to deal with on a day-to-day basis. It is important to realise that even though you may not be working in a retail store, all organisations have customers. There are two major types of customer with whom you may have to deal. These types of customers are:

- **External Customers:** This type of customer is one who will buy your goods or services. They come from outside your organisation.
- **Internal Customers:** This type of customer includes your co-workers, contractors and suppliers to your organisation. Essentially they use the products or services your organisation provides.

Identifying your customers, knowing exactly who your customers are (whether they are internal or external) is crucial to success in your organisation. If you are not able to identify and meet your customers' expectations – the quality of service that you provide will fall short of meeting expectations.



**In a modern organisation a customer is more than just someone buying your product, staff and suppliers are also regarded as customers.**

## The Levels of Service

Within an organisation, there will be levels of customer service provided to customers based on their needs. Often you will find that a simple problem or request does not require the same level of service that is required of a complex problem. It is generally considered that there are four levels of customer service. These levels are:

| Level              | Description  |
|--------------------|--|
| <b>Basic</b>       | At this level, you are aiming to provide the customer with the minimum acceptable standard of customer service that will meet their expectations. These may be things taken for granted – you may not even notice that they are being provided to you. However if this basic level of service is taken away – it may result in customers not being willing to shop with you again. |
| <b>Expected</b>    | At this second level of service, you are dealing with what the customer expects from you. If you provide this level of service an organisation will be satisfactory – but if there are providers offering a higher level of service they will be the preferred provider.   |
| <b>Desired</b>     | At the third level of customer service, you are dealing with the type of service that the customer would like. At this level, once you satisfy the need you are likely to find the customer will become a regular and shop with your organisation on a preferential basis.   |
| <b>Sensational</b> | The highest level of service an organisation can provide. Here the service that is being provided will impress the customer so much that they will just keep coming back. Here you will win loyalty and build a solid customer base through word of your service spreading by word-of-mouth – the most potent form of advertising.   |

### So What Constitutes Sensational Customer Service?

This is a difficult question, as the level of service provided (and that is found to be satisfactory) will vary significantly between individuals. What is acceptable to me may not be seen as being acceptable to you – for example. This is why it is so crucial to establish exactly what the needs of your customers are. Understanding exactly what your customers consider to be good and poor customer service is crucial to understanding how you should go about improving your level of customer service. However there are some aspects of service that can be seen as being universally acceptable and unacceptable. These are:

| Good Service Attributes  |
|--|
| Knowing about the products and services that your organisation offers. |
| Giving the customer your full attention.                               |
| Being helpful.   |
| Showing empathy with the customer.                                     |
| Resolving problems and fixing mistakes quickly.                        |

| Poor Service Attributes                          |
|--|
| Not addressing a customer appropriately.         |
| Incorrectly placing an order.                    |
| Delivering an incorrect product or service.      |
| Giving poor advice.                              |
| Think of three other examples of poor service... |
|  |
|  |
|  |

### Determining Customer Needs

Now that we have addressed exactly what customer service is, let's move on and look at the crucial task of determining exactly what the needs of your customers are. The most common methods of establishing customer needs are:

#### Direct Observation

In this first technique, you will set about establishing customer service needs by observing your customers and the way that your team interacts with them during a service exchange. What you observe can be telling, in that it can reveal what the customers expect, how long they are willing to wait to be served, whether they expect problems to be resolved immediately, whether they like an interactive phone system and other aspects of service.

While it is a very useful technique, direct observation can be costly to implement and can be very time consuming. To gain the most useful information, you must be willing to observe your team and your customers on a regular basis. Essentially the more you are willing to observe, the more useful the information will be.

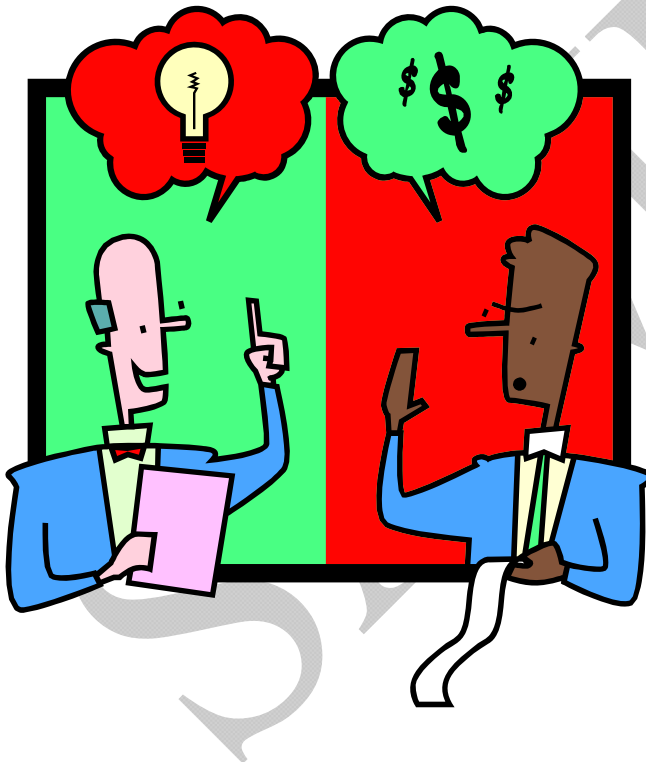
## Comprehensive Studies

Some retailers and service providers have established programs for assessing customers' expectations and service perceptions. For example every year some retailers will pass out questionnaires to shoppers in a store. Shoppers will be asked about the service and merchandise offered by the store and by competing stores. Once these questionnaires have been collected and analysed the results for the year can be obtained.

In the case of a comprehensive study, the same questionnaire will be used year after year. This means that the store is able to track the results over a long period of time. You can determine whether service is improving or declining, and you can identify areas where change can be implemented in order to boost the level of service performance in the organisation.

The survey questionnaire is useful:

- When you need information about a large population or widely dispersed group.
- When the specific issues or topics to be explored are known.
- When you need to minimise the costs of your customer research.



**Questioning your customers is the most direct way of obtaining market and customer information.**

### **Interviews and Consumer Panels**

Rather than surveying many customers, some organisations use a panel of 10 or 15 customers in order to gain insights into their expectations and perceptions regarding service performance. Store managers might meet with a consumer panel once every month or two in order to ask for information about their experiences in the stores and to offer suggestions for improving overall performance.

To reduce any gaps that exist between what the customer wants and what is provided, some organisations will conduct personal checks on customers throughout a day – finding customers who have made very large or very small purchases. They may call these customers and ask what they liked or did not like about the store. In the case of very small purchases the manager may ask why the customer did not purchase more, could they find everything they needed, did they get the assistance that they required?

### **Examining Individual Transactions**

Another method of conducting consumer research is to survey customers immediately after a retail transaction has taken place. For example you may walk up to a customer who has just passed through a checkout and ask them what they thought the service was like. You may call up someone who has just called your organisation to ask what they thought of the service. There are numerous approaches that you can take.

Customer research on individual transactions provides up to date information about customers' perceptions and expectations. The research also indicates the retailer's response in providing good service. Since the response can be linked to a specific encounter, the research provides a method for rewarding employees who provide good service and correcting those who exhibit poor performance.

### **Interacting with Your Customers**

Managers of small organisations will have daily contact with their customers and will thus have accurate firsthand information about them. In a larger organisation, managers often learn about their customers through reports so they miss the rich information provided by direct contact with customers.

Some managers feel that they can become too reliant on numbers and neglect to think about the customers or the merchandise or service they are providing. MBWA (management by walking around) can provide you as a manager with extremely useful information regarding what it is your customers want.

### **Customer Complaints**

Complaints allow organisations to interact with their customers and acquire detailed information about their service and merchandise. Handling complaints is an inexpensive means of isolating and correcting service problems. For example, you may collect all complaints and reasons for returns of merchandise in a retail store.

These complaints and returns can be summarised daily and given to customer service representatives so that they can improve their service. For example think of a circumstance where three people have returned the same pair of jeans on the same day because they were too large. If you were a Customer Service Representative (CSR) that knew this information you could tell customers to select a size smaller than usual to ensure a good fit.

Although customer complaints are a useful source of information, you cannot solely rely on this source of market information. Typically a dissatisfied customer will not complain. To provide better information on customer service, you need to encourage complaints and make it easier for customers to provide feedback on their problems. For example, some organisations provide a complaints desk in a convenient location where customers can get their problems heard and resolved quickly.

### **Feedback from Employees**

Sales people and other employees in regular contact with customers often have a good knowledge and understanding of customer service expectations and problems. This information will improve service quality only if they are encouraged to communicate their experiences to those who can act on it. Some organisations will survey their staff asking questions like:

- What is the biggest problem you face in delivering high-quality service to your customers?
- If you could make one change in the company to improve customer service what would it be?

### **Communicating and Using Customer Information**

Collecting information about customer expectations and perceptions isn't enough. Any gap in service that exists is only reduced when retailers use this information to improve service. For example, store managers should review the suggestions and comments made by customers daily, summarise the information and distribute it to store employees and managers.

Feedback on service performance needs to be provided to employees in a timely manner. Reporting the July service performance in December makes it hard for employees to reflect on the reasons for reported performance. Finally, feedback must be prominently presented so that service providers are aware of their performance.

How you communicate the information will be very much dependent on who you are communicating it to. For the most part, you will use written or verbal communication techniques when communicating with your team.

When providing information regarding service and its improvement to your staff, it is important that the advice that you provide is both relevant and constructive and promotes the improvement of customer service in your organisation.

### **Providing Information on Customer Needs**

While providing advice to your staff based on information you have received is a useful technique, you may also find it useful to present information about customer needs in a more formal way to your staff. This may be for example presenting information to your superiors who require information on customer service. In these cases, you must adopt a more formal and structured way of presenting this information.

Presenting this information is very much like making a presentation on any subject. Knowing how to present the information and what is required of you is of crucial importance. You must begin by ensuring that your audience understands the purpose, business and position of the organisation, and is aware of the importance of high quality customer service to your organisation. Ensure that you emphasise the fact that management is committed to providing excellent customer service.

## Creating a Service Plan

As with any function in an organisation, service requires a plan in order to be effective. Without a plan, your service programs are likely to be ineffective and miss the point of attempting to build customer satisfaction. As with any plan, it should all begin with a set of objectives.

### Objectives

Like any objective, a service objective aims to establish a base point for all service provided by an organisation. It establishes the minimum acceptable service that can be provided. You will remember that earlier in this section we addressed four key levels of customer service. These can be used when setting service objectives.

Sensational service should always be the overall aim for any organisation, but it must be realised that this level of service costs tremendous amounts of time and money and other resources, so therefore it may not always be the most appropriate level of service to provide.

Once you have set your service objectives, and these have been accepted by management, you must ensure that these objectives are communicated to your staff, and then planning on how to ensure the objectives can be achieved can begin.

At this stage, it is important that you can involve your team in the planning process, working with your team members for ideas and ways of implementing a plan can be a motivating force and can help to significantly reduce resistance to change.

Start by thinking about 'Moments of Truth', [A critical moment upon which much depends] and think about the quality of service you are providing. Examine your customers' experiences and focus on how the customer sees these experiences in terms of the organisation. If you can see things as the customer sees them, then you have arrived at a moment of truth. From there, you'll be in a much better position to define, deliver and measure the quality of service you are offering.

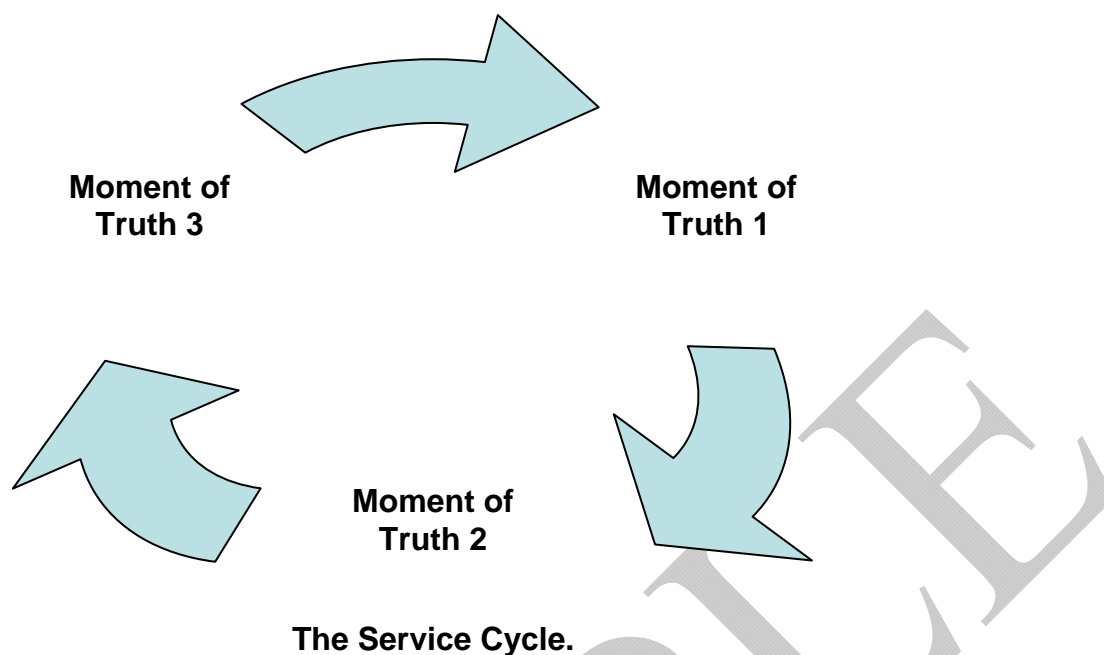
Customers don't consciously look for 'Moments of Truth' — what they want is to have their needs met. You can meet these needs by going through a whole process from beginning to end — a cycle of service.

### 'Moments of Truth'

A moment of truth in customer service occurs any time a customer comes in contact with your organisation and gets an impression of your service. When the customer has a moment of truth with your organisation, you will meet, exceed or fall below the customer's expectations. It is the customer's perception of value that determines how your organisation will be measured in this moment of truth.

### The Customer Service Cycle

The *Cycle of Service* is a map of your company's systems, broken down into increments, steps, decisions, duties, and activities, all designed to take the customer from the front door, through the company, and back out the front door again. While the *Cycle of Service* says nothing about your hope that the customer will want to repeat the process with you again, this hope should be built into your thought processes.



The power behind the *Cycle of Service* is the way it helps you see things that are unique from the customer's point of view. The more you can see, understand, and experience the same things as your customer, the better equipped you'll be to fix what needs fixing or adjust what's working well.

You, as the customer, are constantly making conscious or subconscious value judgments about each of the 'Moments of Truth' you encounter. These value judgments go onto that mental report card you carry in your head.

It's just like when you were in school; these events will exceed your expectations or needs, meet them, or fail to meet them. All customers give you these kinds of "grades" each time they do business with you. Just because you don't hear them out loud doesn't mean they're not being tallied.

When you look at these 'Moments of Truth' individually and collectively from the customer's point of view, what connections can you make with your own experiences? In most instances, a trip to the movies usually meets our expectations. From time to time, something great will happen and these expectations will be exceeded; and rarely, we will experience a total service disaster. But by and large, we get our needs met satisfactorily.

When an organisation exceeds our needs or expectations, we're pleased and often shocked. Since most of our service experiences tend to run at an acceptable level, it's a nice surprise when a company or an employee goes above and beyond the call of duty to make us feel special.

And when an organisation fails to meet our needs or expectations, we're displeased and again, often shocked. Why? Because we've been conditioned over the years to expect good or at least acceptable service from the places we patronise. And it's an unpleasant surprise for us when a company or its employees who seem to go out of their way to be rude, discourteous, or apathetic. Our mental customer report cards are sacred to most of us. We keep careful tabs on who treats us well and who does not. This reflects not only on our decisions about repeat business but also on the positive or negative things we say (or don't say).

## Resolving Problems

The *Cycle of Service* is a useful means of identifying where any problems may exist in your organisation, and the provision of service. The cycle will allow you to ascertain exactly where problems in service delivery exist, and by analysing the problems you can establish solutions. Let's look at some of the key problems that can exist in terms of service delivery. These are depicted below.

### Common Service Problems



#### The big wait

Waiting in line because some of the checkout aisles are closed



#### Don't ask

Sales assistants who are put out by questions or requests



#### I just work here

Powerless sales assistants who lack the authority to solve problems



#### Automatic Pilot

Impersonal sale assistants who provide no eye contact and who are not friendly



#### Broken Promises

Service providers who do not do what they say they will



#### Suffering in silence

Employees who do not respond to customers



#### Red Alert

Organisations who think their customers are stupid or dishonest



#### Misplaced priorities

Sales assistants who spend time visiting each other and talking



#### True Lies

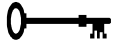
Dishonesty or unfairness



#### Lights on, no one is home

Staff who do not know the answer to common questions





### **Key Points Section 1**

- All organisations must work to determine customer service needs and use this information to clarify and assess appropriate communication techniques for communication of this information.
- Any problems that involve matching service delivery to customers needs to be diagnosed quickly and options for improved service developed to resolve the problem.
- Advice provided to management on customer service must be relevant, constructive and should promote the improvement of customer service delivery.
- All organisations must use business technology to structure and present information on customer service needs.

SAMPLE



### Section 1 - 'True' or 'False' Quiz



|          |          |  |
|----------|----------|--|
| <b>T</b> | <b>F</b> | Customer service is the set of activities and programs that is undertaken by an organisation to make the experience more rewarding for your customers. |
|----------|----------|--|



|          |          |  |
|----------|----------|--|
| <b>T</b> | <b>F</b> | Customer service should involve only front line staff. |
|----------|----------|--|



|          |          |   |
|----------|----------|---|
| <b>T</b> | <b>F</b> | To effectively develop customer service strategies you need to tell customers what to expect. |
|----------|----------|---|



|          |          |   |
|----------|----------|---|
| <b>T</b> | <b>F</b> | Suppliers are an example of an external customer. |
|----------|----------|---|



|          |          |                                    |
|----------|----------|------------------------------------|
| <b>T</b> | <b>F</b> | All service should be sensational. |
|----------|----------|------------------------------------|



|          |          |   |
|----------|----------|---|
| <b>T</b> | <b>F</b> | The basic level of service is the minimum acceptable level. |
|----------|----------|---|



|          |          |  |
|----------|----------|--|
| <b>T</b> | <b>F</b> | Everyone expects the same qualities in good service. |
|----------|----------|--|



|          |          |  |
|----------|----------|--|
| <b>T</b> | <b>F</b> | You can determine customer needs by simply watching customers and staff interacting. |
|----------|----------|--|



|          |          |   |
|----------|----------|---|
| <b>T</b> | <b>F</b> | Surveys are a quick method of determining customer needs. |
|----------|----------|---|



|          |          |                                       |
|----------|----------|---------------------------------------|
| <b>T</b> | <b>F</b> | Customer complaints are never useful. |
|----------|----------|---------------------------------------|