

BSBCUS301 Deliver and Monitor a Service to Customers - Resource



**BSB30115 Certificate III
in Business**

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COURSE INTRODUCTION

ABOUT THIS GUIDE

This learner guide covers one unit of competency that is part of the Business Training Package:

BSBCUS301 Deliver and Monitor a Service to Customers

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 judgment 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.

ABOUT ASSESSMENT

This guide contains a range of learning activities which support you in developing your competence. To apply this knowledge to your assessment you will be required to complete the assessment tools that are included in your program. The assessment is a competency based assessment, which has no pass or fail; you are either competent or not yet competent. This means that you still are in the process of understanding and acquiring the skills and knowledge required to be marked competent.

For valid and reliable assessment of this unit, a range of assessment methods will be used to assess practical skills and knowledge.

Your assessment may be conducted through a combination of the following methods:

- Third-party reports from a supervisor
- Practical demonstration of your skills in a classroom situation
- Projects and assignments
- Portfolio of evidence
- Written or verbal questioning to assess knowledge and understanding of business policies and procedures
- Oral presentation

- A combination of these methods

The assessment tool for this unit should be completed within the specified time period following the delivery of the unit. If you feel you are not yet ready for assessment, discuss this with your trainer.

To be successful in this unit you will need to be able to join your learning to your work place, this should be achievable for those who are employed; those who are not yet employed will be required to use observations of examples that can take place in a workplace environment.

ELEMENTS AND PERFORMANCE CRITERIA

ELEMENT	PERFORMANCE CRITERIA
1 Identify customer needs	<p>1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations</p> <p>1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational requirements</p> <p>1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options</p> <p>1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals</p>
2 Deliver a service to customers	<p>2.1 Provide prompt service to customers to meet identified needs in accordance with organisational requirements</p> <p>2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery</p> <p>2.3 Sensitively and courteously handle customer complaints in accordance with organisational requirements</p> <p>2.4 Provide assistance or respond to customers with specific needs according to organisational requirements</p> <p>2.5 Identify and use available opportunities to promote and enhance services and products to customers</p>
3 Monitor and report on service delivery	<p>3.1 Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational requirements</p> <p>3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational requirements</p> <p>3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements</p> <p>3.4 Regularly seek customer feedback and use to improve the provision of products and services</p> <p>3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery</p>

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential knowledge and skills and their level required for this unit.

REQUIRED KNOWLEDGE

- Key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
 - Anti-discrimination legislation
 - Ethical principles
 - Codes of practice
 - Privacy laws
 - Financial legislation
 - Occupational health and safety (ohs)
- Organisational policy and procedures for customer service including handling customer complaints
- Service standards and best practice models
- Public relations and product promotion
- Techniques for dealing with customers, including customers with specific needs

REQUIRED SKILLS

- Analytical skills to identify trends and positions of products and services
- Communication skills to monitor and advise on customer service strategies
- Literacy skills to:
 - Edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation
 - Prepare general information and papers according to target audience
 - Read and understand a variety of texts
- Problem solving skills to deal with customer enquiries or complaints
- Technology skills to select and use technology appropriate to a task
- Self-management skills to:
 - Comply with policies and procedures
 - Consistently evaluate and monitor own performance
 - Seek learning opportunities

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge and skills, the range statement and the assessment guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

- Evidence of the following is essential:
 - Identifying needs and priorities of customers
 - Distinguishing between different levels of customer satisfaction
 - Treating customers with courtesy and respect
 - Responding to and reporting on, customer feedback
 - Knowledge of organisational policy and procedures for customer service

Context of and specific resources for assessment

- Assessment must ensure:
 - Access to an actual workplace or simulated environment
 - Access to office equipment and resources
 - Examples of customer complaints
 - Examples of documents relating to customer service standards and policies

Method of assessment

- A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
 - Direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate
 - Review of reports on customer service delivery
 - Analysis of responses to case studies and scenarios
 - Demonstration of techniques
 - Oral or written questioning to assess knowledge of customer service strategies

Guidance information for assessment

- Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

PRE-REQUISITES

This unit must be assessed after the following prerequisite unit:

There is **no** prerequisite for this unit.

TOPIC 1 - IDENTIFY CUSTOMER NEEDS

USE APPROPRIATE INTERPERSONAL SKILLS TO ACCURATELY IDENTIFY AND CLARIFY CUSTOMER NEEDS AND EXPECTATIONS

WHAT IS INTERPERSONAL COMMUNICATION?

Interpersonal communication is the process by which people exchange information, feelings, and meaning through verbal and non-verbal messages: it is face-to-face communication. Interpersonal communication is not just about what is actually said - the language used - but HOW it is said and the non-verbal messages sent through tone of voice, facial expressions, gestures and body language. See our pages: Verbal Communication and Non-Verbal Communication for more information.

When two or more people are in the same place and are aware of each other's presence, then communication is taking place, no matter how subtle or unintentional. Without speech, an observer may be using cues of posture, facial expression, and dress to form an impression of the other's role, emotional state, personality and/or intentions. Although no communication may be intended, people receive messages through such forms of non-verbal behaviour.



ELEMENTS OF INTERPERSONAL COMMUNICATION

Much research has been done to try to break down interpersonal communication into a number of elements in order that it can be more easily understood. Commonly these elements include:

THE COMMUNICATORS

For any communication to occur there must be at least two people involved. It is easy to think about communication involving a sender and a receiver of a message. However, the problem with this way of seeing a relationship is that it presents communication as a one-way process where one person sends the message and the other receives it. While one person is talking and another is listening, for example.

In fact communications are almost always complex, two-way processes, with people sending and receiving messages to and from each other simultaneously. In other words, communication is an interactive process. While one person is talking the other is listening - but while listening they are also sending feedback in the form of smiles, head nods etc.

THE MESSAGE

Message not only means the speech used or information conveyed, but also the non-verbal messages exchanged such as facial expressions, tone of voice, gestures and body language. Non-verbal behaviour can convey additional information about the spoken message. In particular, it can reveal more about emotional attitudes which may underlie the content of speech.

NOISE

Noise has a special meaning in communication theory. It refers to anything that distorts the message, so that what is received is different from what is intended by the speaker. Whilst physical 'noise' (for example, background sounds or a low-flying jet plane) can interfere with communication, other factors are considered to be 'noise'. The use of complicated jargon, inappropriate body language, inattention, disinterest, and cultural differences can be considered 'noise' in the context of interpersonal communication. In other words, any distortions or inconsistencies that occur during an attempt to communicate can be seen as noise.

FEEDBACK

Feedback consists of messages the receiver returns, which allows the sender to know how accurately the message has been received, as well as the receiver's reaction. The

receiver may also respond to the unintentional message as well as the intentional message. Types of feedback range from direct verbal statements, for example "Say that again, I don't understand", to subtle facial expressions or changes in posture that might indicate to the sender that the receiver feels uncomfortable with the message. Feedback allows the sender to regulate, adapt or repeat the message in order to improve communication.

CONTEXT

All communication is influenced by the context in which it takes place. However, apart from looking at the situational context of where the interaction takes place, for example in a room, office, or perhaps outdoors, the social context also needs to be considered, for example the roles, responsibilities and relative status of the participants. The emotional climate and participants' expectations of the interaction will also affect the communication.

CHANNEL

The channel refers to the physical means by which the message is transferred from one person to another. In face-to-face context the channels which are used are speech and vision, however during a telephone conversation the channel is limited to speech alone.

Note: When you have the opportunity to observe some interpersonal communication, make a mental note of the behaviours used, both verbal and non-verbal.

Observe and think about the following factors:

- Who are the communicators?
- What messages were exchanged?
- What (if any) noise distorts the message?
- How is feedback given?
- What is the context of the communication?

By observing others - making a conscious effort to understand how communication occurs - you will think about how you communicate and be more aware of the messages you send.

USES OF INTERPERSONAL COMMUNICATION

Most of us engage in some form of Interpersonal Communication on a regular basis, how well we communicate with others is a measure of our Interpersonal Skills. Interpersonal communication is a key life skill and can be used to:

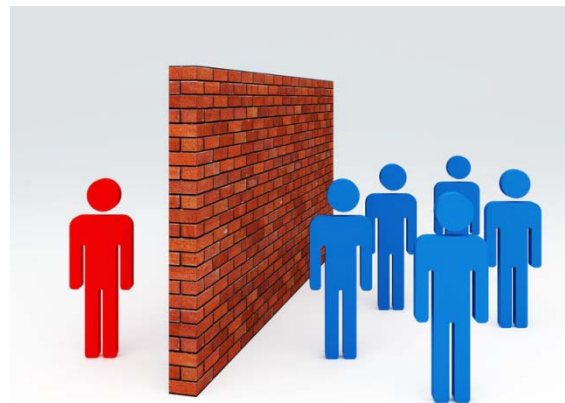
- Give and collect information
- Influence the attitudes and behaviour of others
- Form contacts and maintain relationships
- Make sense of the world and our experiences in it
- Express personal needs and understand the needs of others
- Give and receive emotional support
- Make decisions and solve problems
- Anticipate and predict behaviour
- Regulate power

BARRIERS TO EFFECTIVE COMMUNICATION

There are many reasons why interpersonal communications may fail. In many communications, the message (what is said) may not be received exactly the way the sender intended. It is, therefore, important that the communicator seeks feedback to check that their message is clearly understood.

The skills of Active Listening, Clarification and Reflection may help but the skilled communicator also needs to be aware of the barriers to effective communication and how to avoid or overcome them.

There are many barriers to communication and these may occur at any stage in the communication process. Barriers may lead to your message becoming distorted and you therefore risk wasting both time and/or money by causing confusion and misunderstanding. Effective communication involves overcoming these barriers and conveying a clear and concise message.



Common Barriers to Effective Communication:

- The use of jargon. Over-complicated, unfamiliar and/or technical terms
- Emotional barriers and taboos. Some people may find it difficult to express their emotions and some topics may be completely 'off-limits' or taboo
- Lack of attention, interest, distractions, or irrelevance to the receiver. (See our page Barriers to Effective Listening for more information)
- Differences in perception and viewpoint
- Physical disabilities such as hearing problems or speech difficulties
- Physical barriers to non-verbal communication. Not being able to see the non-verbal cues, gestures, posture and general body language can make communication less effective
- Language differences and the difficulty in understanding unfamiliar accents
- Expectations and prejudices which may lead to false assumptions or stereotyping. People often hear what they expect to hear rather than what is actually said and jump to incorrect conclusions
- Cultural differences. The norms of social interaction vary greatly in different cultures, as do the way in which emotions are expressed. For example, the concept of personal space varies between cultures and between different social settings

A skilled communicator must be aware of these barriers and try to reduce their impact by continually checking understanding and by offering appropriate feedback.

A CATEGORISATION OF BARRIERS TO COMMUNICATION

LANGUAGE BARRIERS

Clearly, language and linguistic ability may act as a barrier to communication. However, even when communicating in the same language, the terminology used in a message may act as a barrier if it is not fully understood by the receiver(s). For example, a message that includes a lot of specialist jargon and abbreviations will not be understood by a receiver who is not familiar with the terminology used. Regional colloquialisms and expressions may be misinterpreted or even considered offensive.



PSYCHOLOGICAL BARRIERS

The psychological state of the receiver will influence how the message is received. For example, if someone has personal worries and is stressed, they may be preoccupied by personal concerns and not as receptive to the message as if they were not stressed. Stress management is an important personal skill that affects our interpersonal relationships. Anger is another example of a psychological barrier to communication, when we are angry it is easy to say things that we may later regret and also to misinterpret what others are saying. See our pages: What is Anger?, Anger Management and Anger Management Therapy for more information. More generally people with low self-esteem may be less assertive and therefore may not feel comfortable communicating - they may feel shy about saying how they really feel or read negative sub-texts into messages they hear.

PHYSIOLOGICAL BARRIERS

Physiological barriers may result from the receiver's physical state: for example, a receiver with reduced hearing may not grasp to entirety of a spoken conversation especially if there is significant background noise.

PHYSICAL BARRIERS

An example of a physical barrier to communication is geographic distance between the sender and receiver(s). Communication is generally easier over shorter distances as more communication channels are available and less technology is required. Although modern technology often serves to reduce the impact of physical barriers, the advantages and disadvantages of each communication channel should be understood so that an appropriate channel can be used to overcome the physical barriers.

SYSTEMATIC BARRIERS

Systematic barriers to communication may exist in structures and organisations where there are inefficient or inappropriate information systems and communication channels, or where there is a lack of understanding of the roles and responsibilities for communication. In such organisations, individuals may be unclear of their role in the communication process and therefore not know what is expected of them.

ATTITUDINAL BARRIERS

Attitudinal barriers are behaviours or perceptions that prevent people from communicating effectively. Attitudinal barriers to communication may result from personality conflicts, poor management, and resistance to change or a lack of motivation. Effective receivers of messages should attempt to overcome their own attitudinal barriers to facilitate effective communication.



IMPROVING COMMUNICATION - DEVELOPING EFFECTIVE COMMUNICATION SKILLS

Effective communication skills are fundamental to success in many aspects of life. Many jobs require strong communication skills and socially people with improved communication skills usually have better interpersonal relationships.

Effective communication is a key interpersonal skill and by learning how we can improve our communication has many benefits.

Communication is a two way process so improving communication involves both how you send and receive messages.

The following list includes things that can help you further improve your communication skills.

LEARN TO LISTEN

Listening is not the same as hearing; learn to listen not only to the words being spoken but how they are being spoken and the non-verbal messages sent with them. Use the techniques of clarification and reflection to confirm what the other person has said and avoid any confusion. Try not to think about what to say next whilst listening; instead clear your mind and focus on the message being received. Your friends, colleagues and other acquaintances will appreciate good listening skills.



BE AWARE OF OTHERS' EMOTIONS

Be sympathetic to other people's misfortunes and congratulate their positive landmarks. To do this you need to be aware of what is going on in other people's lives. Make and maintain eye contact and use first names where appropriate. Do not be afraid to ask others for their opinions as this will help to make them feel valued. Consider the emotional effect of what you are saying and communicate within the norms of behaviour acceptable to the other person. Take steps to become more charismatic.

EMPATHISE

Empathy is trying to see things from the point-of-view of others. When communicating with others, try not to be judgmental or biased by preconceived ideas or beliefs - instead view situations and responses from the other person's perspective. Stay in tune with your own emotions to help enable you to understand the emotions of others.

If appropriate, offer your personal viewpoint clearly and honestly to avoid confusion. Bear in mind that some subjects might be taboo or too emotionally stressful for others to discuss.

ENCOURAGE

Offer words and actions of encouragement, as well as praise, to others. Make other people feel welcome, wanted, valued and appreciated in your communications. If you let others know that they are valued, they are much more likely to give you their best. Try to ensure that everyone involved in an interaction or communication is included through effective body language and the use of open questions.

THE GENERAL NEEDS OF CUSTOMERS

We are all customers in our daily lives. We might be customers at places such as: train stations, gas stations, supermarkets and banks. As a customer, what qualities would you be like to see in the people and the organisation providing services to you? Listed below are some qualities you might have considered.

WHAT ARE CUSTOMER'S NEEDS?

Qualities	Customers need you to...
Accessibility	<ul style="list-style-type: none">• be easy to talk to (approachable)• be easy to contact
Responsibility	<ul style="list-style-type: none">• be willing to keep customers happy• provide prompt service•
Courtesy	<ul style="list-style-type: none">• be polite, respectful, considerate, friendly
Reliability	<ul style="list-style-type: none">• perform the promised service dependably and accurately• be punctual
Security	<ul style="list-style-type: none">• provide security, ie, freedom from danger, risk or doubt (eg security of data, protection of health and safety)
Good at communication	<ul style="list-style-type: none">• keep them informed, in a language they can understand• listen to them
Understand the customers	<ul style="list-style-type: none">• make an effort to know them and their needs
Credibility	<ul style="list-style-type: none">• be trustworthy and honest
Competence	<ul style="list-style-type: none">• have the skills and knowledge to perform the service
Confidentiality	<ul style="list-style-type: none">• not discuss matters relating to them (except with other staff, if appropriate)

Remember that as a person who provides a service, your customers would like to see these qualities in you

CUSTOMERS' SPECIFIC NEEDS

Customers have different needs. For example, they may need information (e.g. how to enrol in a course), a product (e.g. a book), or a service (e.g. a bus trip). Sometimes they may need to complain and are looking for an apology and for someone to take responsibility and action.

Customers can be internal or external to the organisation. They may use a service daily or only occasionally. Sometimes their needs are very specific, e.g., they may want a certain product delivered. Sometimes their needs aren't so clear, e.g. they may not know what they want or need and are asking you to provide solutions.

Identifying customer needs or concerns involves:

- Active listening--allowing the customer to explain their need or concern, without trying to solve the problem immediately
- Questioning--using questions such as reflective questioning techniques to draw out the exact need or concern
- Paraphrasing--repeating the need or concern back to the customer in your own words to check you've understood it correctly
- Developing an action plan for a solution when the customer starts to calm down and then repeating what was agreed on as an action plan
- Encouraging customer to propose solution
- Deciding on the urgency of the customer's needs

Do not:

- Take things personally - they're angry at the organisation not you for expectations not being met
- Present respond a bureaucratic way - let them see you as a human being doing your best to help
- Ignore difficult customers - problems will escalate

WHAT 'ACTIVE LISTENING' MEANS

Active listening is a skill that can be acquired and developed with practice. However, active listening can be difficult to master and will, therefore, take time and patience.

'ACTIVE LISTENING' means, as its name suggests, actively listening. That is fully concentrating on what is being said rather than just passively 'hearing' the message of the speaker.

Active listening involves listening with all senses. As well as giving full attention to the speaker, it is important that the 'active listener' is also 'seen' to be listening - otherwise the speaker may conclude that what they are talking about is uninteresting to the listener.

Interest can be conveyed to the speaker by using both verbal and non-verbal messages such as maintaining eye contact, nodding your head and smiling, agreeing by saying 'Yes' or simply 'Mmm hmm' to encourage them to continue. By providing this 'feedback' the person speaking will usually feel more at ease and therefore communicate more easily, openly and honestly.

Listening is the most fundamental component of interpersonal communication skills. Listening is not something that just happens (that is hearing), listening is an active process in which a conscious decision is made to listen to and understand the messages of the speaker. Listeners should remain neutral and non-judgmental, this means trying not to take sides or form opinions, especially early in the conversation.



Active listening is also about patience - pauses and short periods of silence should be accepted. Listeners should not be tempted to jump in with questions or comments every time there are a few seconds of silence. Active listening involves giving the other person time to explore their thoughts and feelings, they should, therefore, be given adequate time for that.

Active listening not only means focusing fully on the speaker but also actively showing verbal and non-verbal signs of listening. Generally speakers want listeners to demonstrate 'active listening' by responding appropriately to what they are saying. Appropriate responses to listening can be both verbal and non-verbal:

SIGNS OF ACTIVE LISTENING

NON-VERBAL SIGNS OF ATTENTIVE OR ACTIVE LISTENING

This is a generic list of non-verbal signs of listening, in other words people who are listening are more likely to display at least some of these signs. However these signs may not be appropriate in all situations and across all cultures.

Smile

Small smiles can be used to show that the listener is paying attention to what is being said or as a way of agreeing or being happy about the messages being received. Combined with nods of the head, smiles can be powerful in affirming that messages are being listened to and understood.



Eye Contact

It is normal and usually encouraging for the listener to look at the speaker. Eye contact can however be intimidating, especially for more shy speakers – gauge how much eye contact is appropriate for any given situation. Combine eye contact with smiles and other non-verbal messages to encourage the speaker.

Posture

Posture can tell a lot about the sender and receiver in interpersonal interactions. The attentive listener tends to lean slightly forward or sideways whilst sitting. Other signs of active listening may include a slight slant of the head or resting the head on one hand.



Reflective

Automatic reflection/mirroring of any facial expressions used by the speaker can be a sign of attentive listening. These reflective expressions can help to show sympathy and empathy in more emotional situations. Attempting to consciously mimic facial expressions (i.e. not automatic reflection of expressions) can be a sign of inattention.



Distraction

The active listener will not be distracted and therefore will refrain from fidgeting, looking at a clock or watch, doodling, playing with their hair or picking their fingernails.

Good listening skills also have benefits in our personal lives, including:

- A greater number of friends and social networks, improved self-esteem and confidence, higher grades at school and in academic work and even better health and general well-being. Studies have shown that, whereas speaking raises blood pressure, listening brings it down.

LISTENING IS NOT THE SAME AS HEARING

Hearing refers to the sounds that you hear, whereas listening requires more than that: it requires focus. Listening means paying attention not only to the story, but how it is told, the use of language and voice, and how the other person uses his or her body. In other words, it means being aware of both verbal and non-verbal messages. Your ability to listen effectively depends on the degree to which you perceive and understand these messages.

“The most basic and powerful way to connect to another person is to listen. Just listen. Perhaps the most important thing we ever give each other is our attention.”



WE SPEND A LOT OF TIME LISTENING

Adults spend an average of 70% of their time engaged in some sort of communication, of this an average of 45% is spent listening compared to 30% speaking, 16% reading and 9% writing. (Adler, R. et al. 2001).

KEY PRINCIPLES OF ACTIVE LISTENING

Do you sometimes come away from a conversation thinking that the other person didn't really say much? Perhaps you were guilty of not active listening! One of the key principles of active listening is allowing the other person to talk freely.

At the same time, be aware of spending too much time discussing what is not relevant to the task at hand. Below are more principles of active listening that aim to encourage the other person.

Principle	Description
Do more listening than talking.	Give the other person time to talk. Show that you are interested in what they have to say.
Show encouragement.	Use non-verbal as well as verbal cues to show you are listening. For example, maintain eye contact, nod, sit upright and say 'yes' or 'I see' at appropriate places, and use a positive tone of voice.
Avoid appearing tense.	For example, avoid sitting with arms and legs tightly crossed and speaking in a hurried and agitated tone of voice.
Try not to agree or disagree right away.	If you feel you have to disagree, wait until the other person's explained and then disagree but provide reasons for your stand.
Show empathy.	Imagine yourself in the other person's position. Respond to their feelings.
Be 'other-directed'.	In other words, don't project your feelings or ideas on them.
Be accepting of the other person.	This means being non-judgmental and non-discriminatory.
Be non-defensive.	Instead, admit any errors or oversights on the part of yourself or your organisation and apologise for that.
Paraphrase (summarise) what the speaker is saying.	In other words, restate key facts, issues, perceptions and interpretations. When you receive a client request, even a simple one, it's important to check that you've understood it correctly.
Be aware of the other person's sensitivities	If you need to ask questions of a sensitive nature, ask them in a gentle, polite and supportive manner and tone of voice. Assure confidentiality. Wait for the right time to ask as

	well-that is, when the other person is relaxed and you have gained their confidence.
Reflect every now and again on what the other person is saying.	For example, you might say: 'So you were quite upset by that behaviour because you felt that it was quite unfair?' This shows the other person that you understand how they feel and that their concerns and feelings are valid.
Show warmth and support.	Smile, where appropriate. Put yourself in the other person's shoes and try to emphasize. Avoid being cold or abrupt.
Admit it when you're lost.	Avoid pretending to understand. Simply say something such as: 'Sorry, could you just say that again?' Clarify anything you don't understand. This lets the other know that you have been listening and that you understand what they're saying.

The active listening techniques that you'll learn in this topic will enable you to be far more effective in helping people and resolving problems. The questioning techniques you'll learn include reflective questioning, open-ended and closed questions, as well as questions that will help you to elicit more information from clients.

Your objective should always be to help your customers and co-workers-and you cannot help them if you come across as unsupportive. These skills do not come naturally to many people. It's important to practise them.

Reflect on your interactions with people over the past few days. Are you an active listener?

REFLECTIVE QUESTIONS

Active listening is one technique you'll need to practise. A related skill is to use reflective questioning or listening. This is the technique of repeating the sentence with a few changes (paraphrase), but asked as a question.

If you are the one asking the reflective question, you echo back what the other person has told you. The other person then has a chance to either agree or disagree with you. They can clarify their meaning even further or they can point out things you missed or misunderstood.

OPEN-ENDED AND CLOSED QUESTIONS

Can you see how active listening and reflective questioning will help you in your interactions at work, including when you are trying to make sure that you are accurately understanding what your customer needs? Now we'll turn to some other types of questions. We use different types of questions for different purposes. First we'll look at open-ended and closed questions.

Here are examples of each.

Question style	Description
Open-ended question	What do you mean by 'standard precautions'?
Closed question	Is hand washing a standard precaution?

Open-ended questions gather more information. Someone answering an open-ended question cannot answer with a 'yes' or 'no', because it wouldn't make sense. Closed questions do require a 'yes' or 'no', or a similar response. These are used to clarify what you've received or to seek confirmation of the idea that you have.

QUESTIONS USED WHEN TRYING TO OBTAIN MORE INFORMATION

In your interactions at work—whether these are with customers or co-workers—it is so important to be accurate in your understanding of what the other person needs. Remember that sometimes, the other person may not really know what they need. They know what their problem is but they don't know what the need. We may be very good at jobs but if we do not provide the other person with exactly what they need, our efforts are wasted.

Below we've listed more question types. You can use them to help you elicit more information from your customers or co-workers.

WHAT-IF QUESTIONS

Use what-if (or hypothetical) questions to explore the possibilities with the customer (or on your own). You'll also be



able to bring out any reservations that you or the customer may have.

Example:

What if we cannot have your instruments ready by Friday? Is it alright for us to deliver them on Monday afternoon instead?

SORTING AND SIFTING QUESTIONS OR CLARIFICATION QUESTIONS

Sometimes a customer might give you a lot of information but some of this might not be relevant to their request. You need to sift through the information to get to the point, ie, to arrive at the customer's key issues or priorities.

Sometimes what the customer is saying may not seem logical or coherent. Information may seem contradictory. Before you dismiss that information as useless, ask for clarification. Perhaps the customer had not explained in great detail because they had assumed that you had the prior knowledge to understand what they were saying.

Example:

You do not have a problem with the biopsy forceps and the laparoscopes, do you? Are you saying that that is it the specula that were not adequately disinfected?

ORGANISING QUESTIONS

These allow us to structure our information. Without a structure, the information would just be bits and pieces without any discernible patterns. With a good structure, we'll be able to:

- See trends or themes
- See how one bit of information fits in with others
- Compare and contrast

Examples:

- Which of these types of packing and wrapping materials can be used in a steam autoclave? We'll put them in this specially-marked drawer.
- Which materials can be used in a dry heat hot air oven?
- Now which materials, if any, can be used in both the steam autoclaves and the hot air ovens?

PROBING QUESTIONS

Probing questions go deep into the issue or problem. They aim to dig out insights and uncover underlying causes.

Examples:

You have said that paper bags and wraps can be used in steam autoclaves as well as in dry heat hot air ovens. Are you sure that they are OK to use in the hot air ovens? Won't they get brittle?

Sometimes probing questions are provocative (where you play the Devil's advocate). Provocative questions help you eliminate myths, fallacious arguments, hype and the like—and help you arrive at facts or the 'truth'.

For example, a co-worker thinks that she can spray on a layer of disinfectant on a work bench and leave it to dry and the disinfectant will continue to disinfect the work bench. She also thinks that alcohol should be used on general work surfaces.

Examples of the questions you could ask:

- But don't you need moisture for antimicrobial action to occur? Shouldn't we find out whether dried disinfectant left on a surface really disinfects?
- Doesn't alcohol cause rubber to swell, plastic to harden and glues to weaken? Don't you think we should find out whether there are disadvantages to the use of alcohol for surface cleaning?

Self-Test 1.1:

What interpersonal skills do you think you have that can be used when communicating with customers? Please choose all that apply from the list below.

- ☐ Good eye contact
- ☐ Good listener
- ☐ Good at looking like I am listening
- ☐ Good verbal communicator
- ☐ Good at conflict resolution
- ☐ Good body language
- ☐ Good at arguing

Self-Test 1.2

Fill the gaps with words from the list below:

passively, actively, message, concentrating

'ACTIVE LISTENING' means, as its name suggests, _____ listening. That is fully _____ on what is being said rather than just _____ 'hearing' the _____ of the speaker.

Successful organisations place a major focus on being customer focused. Note that these customers can be part of the same organisation (other teams, departments or divisions) and are called internal customers. Those customers who are outside the organisation are called external customers. Every employee is a member of the customer service team – whether they deal directly with customers or not. To meet the needs of customers, every person in the organisation must contribute to ensuring that the customer's needs are met with their product and service.

This unit should have given you greater awareness of how to improve your communication and listening skills so that you can best meet the customer's needs. What questions do you need to ask your customers? Apart from identifying what product they are looking for, how can you identify their quality expectations, service requirements and the importance of pricing?

Activity 1.1

Reflection task - Who are your internal and external customers? What changes can you make to better identify their needs?

ASSESS CUSTOMER NEEDS FOR URGENCY TO DETERMINE PRIORITIES FOR SERVICE DELIVERY ACCORDING TO ORGANISATIONAL REQUIREMENTS

When customer expectations are high, timelines are short, and resources are limited, you need to prioritise your customers' needs. How do you determine what needs to be attended to first?

Here are some guidelines on determining the urgency of customer requests:

UNDERSTAND YOUR CUSTOMERS' NEEDS

Each customer will have a different perception of what customer service means to them. If you want to provide good customer service, you should know the needs of the customer and how to fulfil those needs.

Find out how your customers expect you to meet their needs. The expected level of service varies from marketplace to marketplace, industry to industry and, to some extent, from consumer group to consumer group. Research your marketplace and your target markets to find out what your customers expect of your business in your location.

MEET YOUR CUSTOMERS' NEEDS

Tailor your level of service to suit your customers' needs. Some businesses work well providing a 'no frills' basic level of service while others go beyond customer expectations to achieve a level of service to make their customers say 'wow'.

Some ways to go beyond customer expectations are:

- Introducing initiatives - for example, customer focus groups, customer survey cards or a suggestion box. These initiatives send a clear message to customers that you are interested in their input

- Suggesting add-ons - for example, 'would you like batteries as well?'

FAILING TO MEET EXPECTATIONS

When a business fails to meet customer expectations, customers do business elsewhere. Poor customer service and the perceived indifference of staff and management account for about 68% of customers who don't return to a business. Not meeting their needs on time is also a major problem.

Customer complaints can alert you if your business is failing to meet customer expectations.

MANAGING YOUR TIME

To help you manage your time so that you can meet urgent tasks from a customer or from a colleague, you could create a schedule or keep a time log.

Create a schedule	<p>Your work schedule (or timetable) is a list of tasks that you need to do for the day with a timeframe for each task. Depending on your job, you may need to create or update your schedule at the start of the month, the week, or just the day.</p> <p>Here are important tips:</p> <ul style="list-style-type: none"> • Think about the best times of the day for you and schedule more demanding or creative tasks for those times • Group similar tasks together, for example make outgoing phone calls in a block or ordering a customer's product
Keep a time log	A time log itemises how you spend your time. It helps you review how you currently spend your time, and make changes where necessary.

Suppose one day at work, you receive a number of customers requests and need to assess them for urgency.

Self-Test 1.3:

True or false: You can determine the urgency of a customer's request by asking questions?

- ☐ True
☐ False

Self-Test 1.4:

Customer complaints can alert you if your business is (Please choose all that apply from the list below):

- A. Failing to meet customer expectations
- B. Meeting all of your customer's needs
- C. Maintaining a high level of service
- D. Tailoring your level of service to suit your customers' needs

USE EFFECTIVE COMMUNICATION TO INFORM CUSTOMERS ABOUT AVAILABLE CHOICES FOR MEETING THEIR NEEDS AND ASSIST IN THE SELECTION OF PREFERRED OPTIONS

Sometimes a customer will not know what their options are as they are not familiar with the services you and your unit offer. The customer may appear to know exactly what they want but you need to ask questions to determine whether they know there are options. Revise the question types earlier in this topic to work out the questions you would ask them.

Remember that it is important to disclose all relevant information to customers—so they can make a decision that is *informed*. If informed, they will be able to express their need more accurately and the chances of customer satisfaction will be a more likely.

Your excellence in customer service professionalism is demonstrated by how well you understand the customer's needs and expectations. This understanding must be understood in the context of the customer – their socio-economic factors, age, areas of interest, employment and cultural factors. It must be supported with detailed product knowledge (including product features and benefits) and an ability to provide relevant information (benefits, quality, reliability, ease of use, service and brand reputation).

Activity 1.2

Reflect on situations in your life where you encountered a helpful service provider, eg a shop assistant who gave you explanations of the features of various models of a product and helped you choose the model that would suit you.

Self-Test 1.5:

What is effective communication? Select all that apply from the list below.

- ☐ Listening actively
- ☐ Don't interrupt
- ☐ Pretend you're listening
- ☐ Asking closed questions repeatedly
- ☐ Repeat the customer request

- ☐ Ask open ended questions
 - ☐ Get someone else to deal with the problem

IDENTIFY LIMITATIONS IN ADDRESSING CUSTOMER NEEDS AND SEEK APPROPRIATE ASSISTANCE FROM DESIGNATED INDIVIDUALS

There may be times when you will not be able to meet your customers' requests or resolve their issues— due to constraints. Constraints may include:

- You do not have the authority to meet the customer's need
- You do not think that your unit has the resources to meet the need
- The customer is asking for a service that your unit does not provide (as far as you know)

It is important to speak to someone else about these customer requests instead of just simply telling the customer that you or your unit cannot provide the service. Your supervisor or manager may be able to find ways in which your unit can meet the request. For example, if the customer would like their instruments delivered at very short notice, the manager might be able to re-prioritise work in order to meet the deadline.

In addition to addressing a customer's needs, you also have ethical and legal responsibilities to represent your products or services truthfully. Government legislation such as the Fair Trading Acts protect consumers from unethical or unfair practices. These acts cover safety practices, promotion and advertising, misrepresentation of products, weights and sizes and credit provision. It is the organisation's as well as the worker's responsibility to be aware of these legal requirements.

Activity 1.3

Reflect on situations you have encountered at work where someone (a customer or perhaps co-worker) has asked you for a service that you felt that you would not be able to provide.

Self-Test 1.6:

What would you do if you were unsure about addressing a customer's need?

- A. Ask the supervisor or manager
 - B. Ask the customer to go to another staff member
 - C. Ask the customer to wait while you disappear

D. Tell the customer to go to another store

TOPIC 2 - DELIVER A SERVICE TO CUSTOMERS

PROVIDE PROMPT SERVICE TO CUSTOMERS TO MEET IDENTIFIED NEEDS IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS

TYPES OF CUSTOMERS

- Internal - work colleagues who may require your services in some way in order for them to carry out their job. This may include someone in the same office or department as you, or in another branch which could be in another state or even country.
- External - people from outside the business, who are either making enquiries or purchasing goods or services. This may include members of the public or someone from another organisation.



ORGANISATIONAL REQUIREMENTS

Most organisations have a policy or code of practice, dealing with quality customer service; in order to provide customers with prompt and efficient service for handling enquiries, making sales and monitoring customer feedback. These would include an outline of expected standards of service, including courtesy, discretion, confidentiality and follow-up procedures.

Customer service standards are often set in the organisation's vision and/or mission statement. New employees often undergo an induction training course which may include information on:

- How to greet customers
- How to answer the telephone
- How to deal with difficult customers

- Where to get relevant information
- Who to seek assistance from
- Personal presentation and dress standards
- Interpersonal skills

It is more expensive to find new customers than it is to retain existing customers. Excellent customer service means that a business will stand out from its competitors; and satisfied customers will promote the business by word of mouth, which is the most effective form of promotion.

CUSTOMER SERVICE

Important tips when dealing with customers/clients:

- First impressions are most important
- Business success depends on the quality of the service
- Ask questions to give the customer the opportunity to explain what they need; this makes them feel that their needs are important and also encourages them to become a repeat customer instead of a one-off customer

In a customer/client-focused organisation, employees listen to the customers for their input and feedback in order to ascertain what they consider is important about the products supplied or the way service is delivered. Improvements can then be made resulting in the organisation gaining a competitive advantage over other firms as customers will be happy to become long-term clients.

UNDERSTANDING CLIENT NEEDS

Active listening - Listening is an important skill in communicating with others, as you are able to understand and interpret what the other person is saying. To fully understand the message being conveyed, it is important that you ask questions to clarify the meaning. It is also important to clarify that the other person understands your message. If the client has written or emailed the business for information, it may be necessary to phone them to clarify their needs.

Non-verbal signs - Body and facial expressions are often used when communicating. It is important that your body language is not conveying something different to what you are saying.

Making use of correct questioning techniques - Questioning is an important tool used to obtain feedback and clarification of a message, to ensure that the receiver understands what the sender is saying. There are three main questioning techniques.

- Open questions encourage the sharing of information and usually require longer answers, e.g. for what purpose are you purchasing this product?
- Closed questions are usually asking for a yes or no answer, and do not encourage any further discussion, e.g. Would you like to purchase this product?
- Reflective questions are structured so that the person answers in a particular way, to make their needs clear, e.g. Why does this product interest you?

CHARACTERISTICS OF QUALITY SERVICE

A customer will become a repeat customer if they are satisfied with the quality of service they receive. Quality service includes:

- Employees who are polite, attentive to customer's needs and are able to build rapport
- Employees who have good knowledge of the organisation's products or know the correct person to pass an enquiry on to; and actually follow through with enquiries
- Having goods and services that are reliable and reasonably priced
- Having complaints dealt with promptly and with understanding
- Being treated with respect and without prejudice

BENEFITS OF GOOD CUSTOMER SERVICE

- Promoting goodwill - increasing the established reputation of the business and enhancing its value
- Customer/client loyalty/repeat business - being able to win the customer's trust and build a long-term relationship; one that will survive even in bad economic times
- New business - being able to differentiate from other businesses and be able to attract new customers, often due to word-of-mouth promotion from satisfied customers
- Productivity - the capacity to increase production with little or no increase in costs, improving profitability
- Credibility - building a reputation of being an honest and trustworthy business
- Promoting workplace/organisation service ethic - a set of honourable rules of conduct which will improve the loyalty of employees and give the organisation a competitive advantage

It is important to remember that business success will be dependent on the quality of the service given by employees; satisfied customers will become repeat customers and will promote your business to others, ensuring long-term growth and profitability.

Activity 2.1

Self-Reflection – What are your weaknesses when determining client needs? How could improving on these traits improve your customer and personal job satisfaction?

Self-Test 2.1:

Why is it important that you deal with a customer queries promptly? Select all that apply from the list below.

- So they do not have to wait around for you
- So they are served as fast as possible allowing them to move on
- So you get them out of the way quickly
- So you can go home early

Self-Test 2.2:

Fill the gaps with words from the list below:

discretion, monitoring, practice, efficient, policy, service, enquiries, standards

Most organisations have a _____ or code of _____, dealing with quality customer _____; in order to provide customers with prompt and _____ service for handling _____, making sales and _____ customer feedback. These would include an outline of expected _____ of service, including courtesy, _____, confidentiality and follow-up procedures.

ESTABLISH AND MAINTAIN APPROPRIATE RAPPORT WITH CUSTOMERS TO ENSURE COMPLETION OF QUALITY SERVICE DELIVERY

ESTABLISHING RAPPORT

When developing rapport, you are building a relationship. Personal attributes that will assist employees to be responsive to customer needs include:

- Sincerity - to be genuine and honest
- Confidence - being self-assured or confident in one's own ability
- Enthusiasm - to show interest, displaying good knowledge of the range of products/services available



- Efficiency - capable of producing the required result with minimum waste or effort
- Empathy - identifying oneself mentally with the customer in order to fully comprehend their needs
- Interest in other people - showing concern for their needs

Once you have developed a good rapport, it is important to build on this by continuing the communication. A follow-up phone call after the sale will help to establish the customer as a long-term client.

There are a number of basic rules that apply when you are establishing rapport or a relationship with customers.

SHOW A GENUINE INTEREST IN THE CUSTOMER

Customers prefer to do business with people they like. You can gain this approval by establishing rapport, or a positive connection, with a customer.

Rapport can be established by:

- Asking questions
- Making eye contact
- Offering to help
- Recognising mutual interests
- Simple gestures such as calling a customer by their name

You will usually find that the customer responds to this type of behaviour by identifying you as being keen to assist them to understand their needs and find a solution to their problem. The time you take to establish a relationship with the customer will enhance their commitment and trust in the organisation.

Refer the customer to another appropriate organisation if you are unable to help:

If you cannot help, or refer to another person in the business, honestly tell the customer. It would be even better if you could spend a few minutes talking to them to gather more information and then accurately refer them to the correct organisation.

Provide translations or bilingual support to non-English speaking customers

Most businesses operating in a situation with non-English speaking clients will have set procedures and systems to appropriately service these clients. It is important that you treat these customers with the same respect and courtesy as every other client, even though they may have difficulty communicating.

Present a positive, can do, will help, attitude at all times

A positive, “will help” attitude is important at all times but absolutely critical when the customer is giving you negative feedback or complaining about the service they have received.

Empathic phrases are a simple and easy way of conveying that you understand your customer’s situation. You may try using the following phrases:

- I can see how difficult this must be for you
- I understand what you mean
- I understand how inconvenienced you must feel
- I am very sorry that this has happened to you

Use a genuinely warm and caring tone, to enhance the meaning and effectiveness of empathic phrases.

Saying “I’m sorry” to a customer does not imply that you or your organisation did anything wrong; it simply conveys that you are genuinely sorry that the customer has had a bad experience.

Check with your workplace policies or procedures or your supervisor or team leader regarding your organisation’s preferred method of dealing with angry or dissatisfied customers.

When a customer is upset, they want to express their feelings, and they want their problem solved.

Be patient and allow time for the customer to express their feelings. The customer will be more prepared to listen to you once they have ‘got their feelings off their chest’. You can then begin to participate more actively in the process of solving their problem. Let

the customer know that you understand why they are upset and that you are ready to help them.

TREAT CUSTOMERS SENSITIVELY AND COURTEOUSLY

Treating a customer courteously involves a lot of little things that demonstrate to customers that we recognise and respect them as individuals and that we appreciate the contribution they make to the success of the organisation. This involves:

- Greeting the customer by name
- Smiling and maintaining eye contact
- Offering to assist them
- Asking permission before asking them questions
- Not interrupting them or speaking over them
- Being alert to any special needs that they may have
- Offering additional services where appropriate
- Thanking them for their custom
- Saying goodbye and encouraging them to return

All of the above points are about putting the customer first.

Maintaining success with your customers in the long term depends upon customers consistently receiving real benefits from products and services as well as being treated as an important part of the business. They must feel that you WANT their business and that you APPRECIATE their business. Providing an excellent customer relationship can only be achieved with the “personal touch”.

Self-Test 2.3:

How wouldn't you establish a rapport with your customers?

- A. Asking questions
- B. Making eye contact
- C. Offering to help
- D. Encouraging the customer to make a quick decision
- E. Recognising mutual interests
- F. Simple gestures such as calling a customer by their name

Self-Test 2.4:

Customers prefer to do business with people they like. You can gain this approval by establishing rapport, or a positive connection, with a customer. Is this statement:

- ☐ True
- ☐ False

SENSITIVELY AND COURTEOUSLY HANDLE CUSTOMER COMPLAINTS IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS

Some 96% of customers who have problems don't complain – they just don't come back. Of the 4% that do return, 95% of these will do business again with the store if the problem is solved quickly; 54% to 70% will do business again if the problem is simply solved. This highlights the importance of taking immediate action if a customer returns with a problem. Put into perspective, if you have four complaints a year probably means that you have 96 other customers who have not come back.

This figure becomes more alarming when you consider that people who have had difficulties with your business could relate the story to up to 20 other people. The main reason that people don't return is because they expect that nothing will be done, and they can do without the hassle of arguing and being treated poorly. One important factor to remember, regardless of who or what has caused the problem, is that in almost all cases customers genuinely believe they have a legitimate problem. Handling all customers with problems tactfully and thoughtfully is critical to retaining them, regardless of the way they choose to let you know of the problem.

WHY DO CUSTOMERS GET UPSET?

All customers are different, so it is normal to expect a difficult customer at some point of your working day. This customer may be either an internal customer or an external customer. How you deal with this situation is vitally important and turning an angry or difficult customer into a loyal customer is a skill that you will be required to use many times in the retail environment.

There are many reasons why customers become difficult. These could include:

- Someone was rude to them, whether it was intentional or not
- No-one listened to the customer
- The customer's needs were not met
- The customer may be intoxicated or affected by drugs
- The customer may be responding to peer pressure to cause a problem

REASONS FOR CUSTOMER COMPLAINTS

Most complaints fall into 4 groups.

Value for money - a customer's perception of value is very important. Store presentation and excellent customer service reinforce the customer's perception of value.
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Price overcharge - mistakes happen, so the way a mistake is dealt with and corrected will determine customer satisfaction. Good customer service is essential.

Product - faults or complaints are not necessarily the fault of the retailer but the way the complaint is handled determines the customer's perception of the business.
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Service - is the essence of good retailing. Rudeness and poor service discourage customers from returning.

METHODS OF CUSTOMER COMPLAINTS

LETTERS

Letters are a very common form of complaint; they are generally seen as the most official way of complaining. This means that most customers will only use a letter of complaint where they feel there is a serious dissatisfaction, and where the business has a separate address for complaints or head office.

Letters have an advantage to your business, as they allow you time to look at a problem, solve it, and reply to the customer; hopefully ensuring they are satisfied enough to remain a customer.

SPOKEN WORD TO EMPLOYEES

The most common form of complaint, particularly in retail businesses; is face to face with an employee (usually the front line staff). This could take the form of a passing word or gesture, and can be for small or large problems.

Typical comments include things such as: "This is not the first time...", "I can't believe that..." or even a 'tut' noise in a sentence. They are generally informal complaints or comments, only occasionally do they turn into full scale complaints.

Although there is no official complaint in most cases, spoken word comments can provide information on the everyday problems that customers are experiencing, and provide an opportunity for your employees to solve these problems, both for these customers, and for future ones.

PHONE CALLS

These are another common form of complaint, generally used for informal minor complaints, but can also be used by a highly dissatisfied customer who does not wish to write. The frequency of phone complaints generally depends on how much your business uses the phone; a call centre will receive many more complaints than a basic office line.

Phone complaints allow you to look into a problem, but do not usually give you as much time to solve it as a letter or email.

EMAIL

Emails are similar to letters; however they tend to describe smaller problems that are expected to be solved in a much quicker time. The number of email complaints you receive will depend mostly on how widely you use email, and whether there is a specific enquiry or complaints email address.

HANDLE COMPLAINTS SENSITIVELY, COURTEOUSLY AND WITH DISCRETION

Problems happen. It's how you honestly acknowledge and handle them that counts with people. Customers will remember you, and happily give you another chance to delight them when you choose to correct problems with the very best you can offer, proving you value them and their business.



COMMUNICATING WITH A COMPLAINING CUSTOMER

STEP ONE: LISTENING

- Listen to the complaint: Let the customer get it off his/her chest. Don't interrupt. Make sure you hear the full story. Ask open questions to encourage the customer to tell you as much as s/he wants to. Don't argue and don't explain
- Communicate warmth and understanding: Use body language which shows understanding: don't cross your arms, lean slightly towards the customer, nod, have a pleasant but serious expression. It is not a laughing matter - don't paint a fixed smile on your face. Say things that encourage the customer to speak: "Ah-ha", "Mmmmm", "Right", "Gosh", "How awful" and so on.
- Use the customer's name
- Imagine what you would feel like in the same situation as you concentrate on listening to what the customer is saying
- Don't commit the company to any action. Don't admit liability. Action is for a later stage
- Don't take it personally. The customer is not angry with you, but with the company and the service or product

STEP TWO: CALM THE CUSTOMER

- Apologise and acknowledge the customer's feelings e.g. "I am so sorry. You must have been annoyed. I would have been."
- Summarise the complaint in your own words to show the customer that you have really listened and understood: "As I understand, this is what happened Is that right?"

STEP THREE: TAKE RESPONSIBILITY

- Check with your supervisor. Summarise the complaint to him/her. Do not have a dig at the customer when you tell the supervisor the tale. If you are two-faced, you can be sure it will come out in some way
- Communicate as soon as possible to the customer what the store proposes to do
- Explain (don't excuse) what went wrong if you need to. By now the customer is relaxed because you are going to rectify the problem and will listen and probably even understand
- Check that the customer agrees with the course of action. If s/he does not, then ask the customer what their expectations are. Relay this to whoever it is that makes decisions. At this stage if the customer is still unhappy, it is probably best for a senior to take over

STEP FOUR: FOLLOW UP

- Check that what you promised actually happens, and that it happens by the time you said it would. You should keep a diary note

- Ring the customer up after the complaint has been rectified and make sure s/he is happy (or check at the end of the conversation)

Employees receiving customer complaints should always be friendly, polite, and helpful; and try their best to resolve the problem if they can. Even if a problem cannot be totally solved, the fact that your business did everything you could to help will make the customer feel much less negative about your business, hopefully enough to keep them with you (so you can ensure they are fully satisfied next time around!).

Sometimes it can be difficult for an employee to feel like helping an angry customer, particularly if the problem is not their fault; however it is crucial that they remain polite and helpful at all times.

Remember that body language is a large part of communication, so listening while looking away will just make the customer think you are ignoring them.

USE ACTIVE LISTENING AND QUESTIONING TO ESTABLISH NATURE OF COMPLAINT

A critical aspect of resolving the complaint is to identify the complaint. In most cases, the customer will tell you what the problem is, but their version is certain to leave out relevant information. This information may be information which lessens their case, or which puts a different slant on things.

LISTEN TO YOUR CUSTOMER

One of the best ways to help make unhappy customers feel better about your business is to listen. This shows that you care about your customers, and are looking out for them.

Active listening is a structured form of listening and responding that focuses the attention on the speaker. The listener must take care to attend to the speaker fully, and then repeats, in the listener's own words, what he or she thinks the speaker has said. The listener does not have to agree with the speaker--he or she must simply state what they think the speaker said. This enables the speaker to find out whether the listener really understood. If the listener did not, the speaker can explain some more.

Active listening has several benefits:

- First, it forces people to listen attentively to others
- Second, it avoids misunderstandings, as people have to confirm that they do really understand what another person has said
- Third, it tends to open people up, to get them to say more

ESTABLISH NATURE OF COMPLAINT

You must talk to the customer to work out whether the issue is beyond your authority to fix, indicating that a manager needs to become involved.

Attempt to find out:

- Names of those involved
- Promises that the store/staff may have made
- Service or products that failed to live up to promises or expectations, including how
- They failed to deliver on quality or expectations
- Timelines relating to the complaint
- Costs, money or charges involved
- The factual details, as far as can be ascertained, as to what was said and by whom
- Actions, or inactions, taken (or not taken) by the staff

When you have uncovered all the details about the issue, repeat them back to the person and then move on to seek agreement about what should be done.

Whatever is decided on must be explained in detail so there can be no doubt about what you are going to do; when such agreement is taken place, your next step is to implement the agreed solution.

TAKE ACTION TO RESOLVE COMPLAINT TO CUSTOMER'S SATISFACTION

ALWAYS OFFER A SOLUTION

When a customer complains, you should always offer them a solution to the problem. If you cannot directly fix the problem, offer them something else to try and keep them satisfied.



There are many different types of solution, but they could all turn a disappointed customer into a happy one:

- Replacement - If you sell a product that has broken, offer a replacement. If an exact replacement is not available (or not wanted) you can try replacing with a similar make or model. A replacement solves any problem with the product, it may cost you the value of a new product, but losing the customer will probably cost much more in the long run.
- Refund - If a customer is really unhappy with a product or service they may want a refund. This will mean a loss of the sale revenue, but providing a refund without hassle will strongly improve the chances of the customer returning again. In some cases a partial refund may solve minor problems (E.g.: Slight scratches on a product, etc...)
- Fixing - If there is a problem with a product, try fixing it! If a customer has a problem with your service, try taking steps to solve the problem and prevent it happening again. If the problem is an employee, speak with them, or if it continues, consider giving a verbal warning. If there is a common employee problem, you may be able to help solve it with training.
- Money off Next Purchase - For smaller problems, it may be satisfactory for you to offer the customer money off of their next purchase with you. This helps to ensure that they will return to you, whilst minimising the cost of solving the problem.
- Apologise - Sometimes one of the most effective forms of solution can be an apology, informally for minor problems, or written for major problems. An apology should be genuine, and may go alongside other forms of solution, particularly if the problem is significant, or the customer is an important one. An apology shows that you care about the customer, and that you are aiming to put right any problems they have encountered.

REFER UNRESOLVED COMPLAINTS TO SUPERVISOR

The importance of effective resolution of customer complaints impacts upon the customer service performance of the organisation and should be resolved in a manner which is professional and compliant with your organisation's procedures.

You may not be able to resolve a complaint because:

- The customer is unprepared to negotiate what they see as being the only acceptable resolution
- The customer is irate, aggressive, threatening or intimidating
- The solution is beyond your authority to act on
- There is a lack of understanding in relation to the complaint
- There is a language problem

Sometimes, the customer's issue needs to be dealt with by someone with a different authority level. All these situations must be referred to the appropriate person as soon as possible to prove their complaint is not being ignored.

The appropriate person may be:

- Supervisor/management
- A more senior staff member
- The owner
- Accounts Department
- Delivery staff

When customers are referred to other members within an organisation, they can feel frustrated and perhaps even become hostile if they feel they are getting the "run around".

Here are some ideas you can apply to help reduce customer frustration:

- Do everything practical to ensure that the customer does not have to repeat his or her story to the next person
- When transferring a phone call to another staff member, make every effort to "fill in" that member about the particulars of the problem
- Keep in mind that hostile customers may be best calmed down by referring to a supervisor. We know that people tend to behave less aggressively when they speak to a supervisor, regardless of level in the organization
- Again, when referring to a supervisor, make sure the supervisor is aware of the problem, and the emotional state of the customer (hostile, angry, threatening, etc)
- Before referring, make sure you understand the customer's situation and what he or she wants. A major error that employees make is to not listen well, or, not ask the right questions, and assume that a referral is in order. Good listening skills are important
- When referring, try to tell the person how long the wait will be, or what to expect

Remember, it is the little things that make the difference.

TAKE OPPORTUNITIES TO TURN AROUND CUSTOMER DISSATISFACTION

Use customer complaints to turn casual customers into loyal, long-term customers.

When you think about it, you usually don't get much time when you serve happy customers - a matter of minutes, if that.

If a customer comes to the store to complain, you are given a valuable opportunity: you have time to get to know each other better.

You get to know:

- The customer's name (and perhaps address and phone number)
- What the customer likes
- What the customer doesn't like
- How you can encourage the customer to return

The customer gets to know:

- That you give excellent customer service
 - That you guarantee your products and services
 - That you care personally about him/her
- "Oh no! A complaining customer. Let me out of here!"**

Are these your innermost thoughts when you realise a customer is going to complain to you about something? If your answer is "yes" you are not alone. Many people involved in customer service make a mistake: they treat complaining customers and difficult customers the same way.

But the truth is that all of us can be complaining customers. It just means our expectations of a product or service were not met and we let the store know.

It is very likely that you will be able to transform a complaining customer into a loyal, long-term customer.

TURN COMPLAINTS INTO OPPORTUNITIES

When a complaint is made it provides us with an opportunity: to make a further sale, to "save" the situation, to impress the customer with other aspects of our store, and to apologise.

It is an opportunity to show a high level of customer service by:

- Showing concern for the individual and for the situation they find themselves in
- Acting promptly rather than dismissing the complaint
- Demonstrating genuine desire to find a quick and acceptable solution
- Reporting back to the customer on progress of the resolution
- Being understanding and apologetic
- Checking to ensure that what was agreed on has been done and all is now okay

CHECKLIST FOR HANDLING CUSTOMER COMPLAINTS

Use this checklist to help ensure that you are handling a customer complaint well:

- Demonstrate a positive, helpful attitude to the customer
- Demonstrate courtesy to the customer
- Demonstrate understanding of the customer's feelings
- Listen to the customer
- Ask open-ended questions to get information from the customer
- Give feedback to the customer to show you understand their problem
- Take action to resolve the customer's complaint
- Refer the customer's complaint to your supervisor if necessary
- Turn a dissatisfied customer into a happy customer
- Complete any documentation that is necessary
- Take follow up action to ensure the customer is happy

ACCURATELY COMPLETE DOCUMENTS REGARDING CUSTOMER COMPLAINTS

BENEFITS OF RECORDING CUSTOMER COMPLAINTS

Having a record of complaints is useful for monitoring any patterns and finding areas of improvement in the business. It is also handy as a record of dates if a customer returns to make further complaints.

As part of the recording system, make sure there is a way to tell resolved complaints apart from the unresolved ones. It could be as simple as moving a complaint form into another section of a folder or putting a red line across a complaint once it has been resolved.

A regular check of the records will then show you which complaints still need to be resolved. This way, no complaints will be left unresolved for very long and customers won't be kept waiting.

Recording any follow up contact with customers is also useful for establishing an effective complaints process.

DOCUMENTATION

A comprehensive complaints procedure will include a recording system for the complaints. This could be a notebook where all complaints are written or a form for customers or staff to fill in and the business to file.

Commonly the complaints forms will be at service counters, in the staff tea room and/or in the manager's office.

Complaints must be recorded accurately and legibly and it is usual to complete these forms as soon as possible while the details are still fresh in your mind. Management may use these forms to alter training or systems to improve customer service, so don't feel they are there to allocate blame.

SAMPLE CUSTOMER COMPLAINT FORM

Customer's Name:
Address:
Home Phone Number:
Work Phone Number:

Customer Complaint: Please include a clear description of all the relevant information.
Sales Assistant Handling Complaint:
Department:
Date:

TAKE FOLLOW UP ACTION TO ENSURE CUSTOMER SATISFACTION

Taking follow-up action in relation to complaints involves checking with the customer to ensure they are happy, and taking internal action to prevent the problem happening again.

FOLLOWING UP CUSTOMER COMPLAINTS

After acting on a complaint, check with your customer if the resolution is to his satisfaction. This is a very important part of dealing with a complaint. Follow up procedures demonstrate to the customer that they are a valued part of your business.

Checking with customers offers us another opportunity to provide outstanding service, and gives us another chance to "make things right". It also shows we have taken their complaint seriously, and we value them as a customer. It can transform a situation where they were annoyed into a Wow factor.

You might want to follow up a few weeks after, just to check on things. Your customer might be able to give you a few insights on how to make your service better.



Follow up may take the form of formal documentation, as required by the policies and procedures of your employer, a letter of apology, or a phone call to the customer to see if they are happy.

Whatever form of follow up is used; it helps to ensure customer loyalty.

Activity 2.2

Review your organisation's complaints procedures. What things does your organisation do well? What areas could be improved?

Self-Test 2.5:

Why should you be polite and courteous to customers? Choose the answer that is most correct.

- A. So that customers won't complain
- B. Because you have to
- C. Because the boss said so
- D. Because they deserve it

Self-Test 2.6

Fill the gaps with words from the list below:

Service, Value for money, Product, Price overcharge

Most complaints fall into 4 groups.

_____ - a customer's perception of value is very important. Store presentation and excellent customer service reinforce the customer's perception of value.

_____ - mistakes happen, so the way a mistake is dealt with and corrected will determine customer satisfaction. Good customer service is essential.

_____ - faults or complaints are not necessarily the fault of the retailer but the way the complaint is handled determines the customer's perception of the business.

_____ - is the essence of good retailing. Rudeness and poor service discourage customers from returning.

PROVIDE ASSISTANCE OR RESPOND TO CUSTOMERS WITH SPECIFIC NEEDS ACCORDING TO ORGANISATIONAL REQUIREMENTS

HOW DO YOU SERVE CUSTOMERS WITH SPECIAL NEEDS?

Essential elements are:

- The ongoing need to be polite and courteous
- The need to be warm, genuine and empathetic
- Knowing when to back off and allow people to help themselves
- Being yourself
- Knowing your own personal limitations and realising when to:
 - Involve another staff member
 - Obtain an interpreter
 - Refer them to somewhere, or someone else
 - Redirect them to another section, department or area within the store
- Consistency

Serving customers with special needs requires you to have a positive attitude, good communication skills, patience and, often, a sense of humour.

SERVING CUSTOMERS WITH INTELLECTUAL DISABILITIES

Some techniques of good service are:

- Understand that people with intellectual disabilities may or may not have physical disabilities as well
- Serve them the same way you serve other customers: make them welcome, find out their needs, meet their needs, and complete the sale and farewell them
- Always first try to communicate directly with the customer. If you cannot establish communication with the customer, communicate second hand through the companion
- Do not guess what the customer wants: clarify and confirm
- Do not guess what the customer is like as a person
- Do establish a warm, humorous relationship if both you and the customer genuinely share the warmth and humour
- Find out by asking if there is any special service you can provide. Make your own suggestions too
- Don't try too hard. It comes out as artificial. Being yourself is the best there is
- Treat the customer with the same respect you'd show any other customer
- Be patient if the customer needs time to communicate
- Give feedback to show you've understood
- Act naturally



Serving Customers who are Deaf or Hearing Impaired:

- Get the person's attention before talking. A tap on the shoulder or a wave of the hand in their field of vision are two acceptable ways of doing this
- Do not stand in front of a window or bright light. You are then easier to see
- Look at the person as you talk
- Speak naturally. Don't exaggerate your lip movements or speak louder. These distort your speech and make you harder to understand
- Don't mumble, eat or smoke
- Use simple language and sentence structure. Don't however, patronise. There is a difference between keeping things simple and being patronising
- Avoid background noise
- Use visual clues and gestures
- Write down what you want to say
- Be patient. Show tolerance and good humour
- Use a combination of speech and writing



SERVING CUSTOMERS WHO ARE BLIND OR VISION IMPAIRED

If you are serving customers who are blind or vision impaired, there are some simple things you can do which make their shopping easier.

- For a start, walk up to a customer straight away. It is awful standing in a store for a long time waiting for someone to notice you
- Say something simple like "Hi, would you like some help?"
- Then tell the customer you are a salesperson to show you are not another customer
- Then ask the customer "What is your guiding technique?"
- Don't just grab the customer's arm and start leading. The customer will tell you the best way to guide
- Talk as you usually would. Don't shout. They're not deaf
- To provide good service, you have to listen to the customer very well



SERVING CUSTOMERS FROM NON-ENGLISH SPEAKING BACKGROUNDS

- Greet the customer as usual. Most non-English speaking customers recognise some basic words
- Use positive body language to assist your communication
- Speak slowly and in simple English
- Listen very carefully
- Give feedback to show you understand
- Use pictures and diagrams if necessary
- Show friendliness and tolerance
- Get feedback from the customer: “No”, “Yes”, “Bigger”, “Another one”, etc
- Use the Translating and Interpreting Services if necessary. Phone 13 1450 from anywhere in Australia, 24 hours a day



Self-Test 2.7:

When serving a customer with special needs you need to know your own personal limitations and realise when to:

- ☐ Involve another staff member
- ☐ Raise your voice
- ☐ Obtain an interpreter
- ☐ Walk away
- ☐ Refer them to somewhere, or someone else
- ☐ Redirect them to another section, department or area within the store
- ☐ Avoid interaction

IDENTIFY AND USE AVAILABLE OPPORTUNITIES TO PROMOTE AND ENHANCE SERVICES AND PRODUCTS TO CUSTOMERS

Once you have established the needs and expectations of your customers, you then need to develop appropriate solutions using your products and services and offer them the best possible option to meet or exceed their requirements. Although this process differs from business to business.

The following are some simple guidelines:

- Assess and prioritise customers' requirements

- Identify all possible solutions that could meet customers' needs and wants
- Effectively communicate the available options to the customer and suggest choices that match their requirements
- Assist customers in the selection of the best possible option

In addition to these you also need to:

- Provide prompt service to customers to meet identified needs in accordance with business requirements
- Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery
- Sensitively and courteously handle customer complaints and objections in accordance with business requirements
- Provide assistance or respond to customers with specific needs in accordance with business requirements
- Identify and use available opportunities to promote and enhance services and products to customers

There are lots of ways that a sale can be enhanced to the benefit of both the customer and the organisation. Upselling is where a higher priced item or a greater quantity is sold to the customer compared to what they originally intended to buy. Cross selling is where you sell additional products that complement the customer's purchase. A classic example is the McDonald's "Do you want fries with that" question. Underselling is where you offer the customer something less expensive so that you can make the sale. This can result in customer's returning for other purchases thus benefiting the organisation over the longer term. Note that this last approach should not be confused with the illegal practice of "switch and bait". This is where a product is advertised at a very low price to attract customers but there is no intention to actually make the sale at this low price. Customers are then told the cheaper items have all been sold and a higher priced item is offered. This is illegal under the Fair Trading legislation in Australia.

Self-Test 2.8:

What types of things can you do to promote and enhance services and products to customers? Please choose all that apply from the list below.

- ☐ Go the extra mile with customers
- ☐ Ensure products are of the standard required
- ☐ Never lie to customer
- ☐ Always do as you say you will do
- ☐ Gather feedback from customers

Self-Test 2.9:

Once you have established the needs and expectations of your customers, you then need to develop appropriate solutions using your products and services and offer them the best possible option to meet or exceed their requirements.

Is this statement:

- ☐ True
- ☐ False

TOPIC 3 - MONITOR AND REPORT ON SERVICE DELIVERY

REGULARLY REVIEW CUSTOMER SATISFACTION WITH SERVICE DELIVERY USING VERIFIABLE EVIDENCE ACCORDING TO ORGANISATIONAL REQUIREMENTS

Reviewing customer satisfaction begins with customer research. Most medium to large organisations have specialised departments that plan and conduct customer research. We will have a look at some of the techniques you may be required to understand in order to effectively research (or review) customer satisfaction.

THE RESEARCH PROCESS

Like all research processes, customer service research has five broad phases. These are:

- Defining the problem and documenting the research objectives
- Developing the research plan for collecting information
- Implementing the research plan — collecting and analysing the data
- Interpreting and reporting the findings
- Post-implementation review

Let's look at each of these in more detail.

DEFINING THE PROBLEM AND RESEARCH OBJECTIVES

In this phase, you need to define and document the objectives of the research. This phase expresses the outcome as a series of goals. Defining the problem is often the hardest part of the research process, as a manager may know that a problem exists but be unsure how to put the problem in 'research language'.

Defining a problem keeps us focused on our goal, and encourages us to start with the end result in mind, instead of getting bogged down in details. This is the essence of strategic thinking and planning. For example, a manager may suspect that an organisation is losing customers as a result of poor service. Before trying to implement

solutions, the frontline manager needs to be sure of the problem and its causes. The problem can be defined as a goal, or a series of goals, such as:

- Determine the causes of customer attrition by implementing weekly satisfaction surveys

Sometimes defining a customer service problem can be tricky and it can be a good idea to involve an experienced market research specialist at this point in the process.

Once the problem has been defined, you need to identify the specific objectives of the research process. There are three general types of research objectives for most research processes:

- **Exploratory:** These objectives relate to gathering information about a customer service related problem or impact of a new customer service. For example, a manufacturer may wish to investigate whether the introduction of a 24-hour help-line would solve the majority of consumer problems and therefore reduce the processing costs of returned goods
- **Descriptive:** Descriptive objectives relate to the customer research that will be used to better describe customer service related problems or situations. For example, you may wish to investigate if a new customer service will appeal to the customers in your area
- **Causal:** The final category of objectives is causal objectives. These objectives investigate customer service 'effects' eg, aggressive behaviour by customers when market researchers call after 7pm. This type of investigation of the linking between observed factors is called 'cause and effect relationship' research

Finally, using these objectives, you need to decide who will use the information gathered and how they will use it. Considering these objectives helps you to define what data or information needs to be gathered, identify what questions need to be asked and determine what the customer service research sample needs to be.

DEVELOPING THE RESEARCH PLAN

Once the objectives have been identified, the next phase is the development of the research plan. The following planning steps are usually used in an organisational planning process:

- The outcome is expressed as a series of goals (as described above). In customer service research these goals must include determining the specific information needs of the research. For example, must the final information outcome include demographic data, lifestyle characteristics, and consumer attitudes to the packaging?
- A list of actions to achieve each goal is created
- A time line for each action is prepared
- Resource allocation occurs for each action
- Possible problems are identified and contingency plans are created
- A monitoring process is designed and implemented
- Final costs are estimated
- The plan is implemented

In customer service research, there are four additional areas that must be addressed during the planning process. These involve the following:

- **What 'primary' and 'secondary' data to gather** (usually included as part of a list of actions to be achieved for each goal). Primary data is data that is collected specifically for this customer service research. Secondary data is information that already exists as it has been collected for another purpose, such as demographic data or the organisation's Profit and Loss Statement.
- **The customer service research techniques that will be used.** These include are interviews, surveys, focus groups and case studies.
- **Selecting the suitable sample of customers** who will be used for the customer service research. Choosing your sample is critical. To seek information from the wrong sample of customers, or a very limited sample, could mean invalidating your customer service research.
- **Selecting an appropriate customer contact method.** If the customer research requires customer contact then you must decide what customer contact methods will be used to gather the data. Common forms of customer contact include mail, telephone, email or personal interview. A summary of the strengths and weaknesses of these four contact methods is provided below:

Strengths and weaknesses of customer contact methods

	Mail	Phone	Personal Interview	Email
Flexibility	Poor	Good	Excellent	Fair
Data quantity Collected	Good	Fair	Excellent	Fair
Speed of response	Poor	Excellent	Good	Good
Response rate	Poor	Good	Good	Poor
Cost	Good	Fair	Poor	Excellent

IMPLEMENTING THE RESEARCH PLAN

In the next phase, the research plan is implemented and managed. Although the management of the customer service research plan may be controlled by the organisation, many organisations today elect to have the customer service related data collected by a third party — this reduces costs and ensures objectivity. ‘Mystery Shopper’ organisations provide this type of service.

INTERPRETING AND REPORTING ON THE FINDINGS

In this phase, you interpret the findings, draw conclusions from the data collected and present the results to your team and the organisation.

POST-IMPLEMENTATION REVIEW

As with all good plans, customer service research should conclude a post-implementation review. In this phase you ask and answer the question, ‘What did we do well this time and what could we do better next time?’

Your service research planning template could look like this:

Research objective(s): exploratory, descriptive, causal				
Phase	Actions	By when	By whom	Resources required
Develop research plan (including research techniques, customer sample, contact method)				
Implement research plan				
Interpret and report research results				
Post-implementation review				

Self-Test 3.1:

Reviewing customer satisfaction begins with customer research?

Is this statement:

- ☐ True
☐ False

Self-Test 3.2:

Fill the gaps with words from the list below:

Implementation, Reporting, Developing, Implementing, Defining, Interpreting

Customer service research has five broad phases:

- _____ the problem and documenting the research objectives
- _____ the research plan for collecting information
- _____ the research plan — collecting and analysing the data
- _____ and _____ the findings
- Post-_____ review

IDENTIFY OPPORTUNITIES TO ENHANCE THE QUALITY OF SERVICE AND PRODUCTS, AND PURSUE WITHIN ORGANISATIONAL REQUIREMENTS

Once you have completed your customer research you have quantifiable data, which can be used as the basis for constructive suggestions that will lead to changes in service standards. You can also provide advice on future directions of client service strategies.

The underlying purpose here is to improve service performance and to increase customer satisfaction. It's important to be systematic.

You need to be able to describe the performance gap and discuss it with your team. Often these situations become difficult because people's emotions and feelings of self-worth come into play. One way to keep a positive focus is to think of this as a **problem-solving activity**.

Problem-solving step	Problem-solving skills	Talking to team member about improving customer service
1. PROBLEM	Describe the problem	Describe the performance gap.

	<p>Identify the outcome you want</p> <p>Ask for help</p>	<p>Explain exactly what standard of customer service is required.</p> <p>Explain why it's important that the team reaches the customer service standard.</p> <p>Find out what's preventing the team from reaching the standard.</p> <p>Ask for the team's point of view and listen without interrupting</p>
2. SOLUTION	<p>Develop options</p> <p>Consider the consequences</p> <p>Make the decision</p> <p>Develop an action plan</p>	<p>Develop options for reaching the customer service standard with the team.</p> <p>Discuss the merits of the various options and agree on a solution.</p> <p>Develop a clear action plan that states who does what, and by when.</p>
3. REVIEW	<p>Ask yourself how it's going and when it's finished, how it went.</p>	<p>Measure the performance.</p> <p>Has the customer service performance gap increased or decreased?</p> <p>Is the team implementing the agreed solution?</p>

Self-Test 3.3:

What would you consider an opportune time to enhance the quality of your products and services?

- A. Whenever the customer is in the store
- B. Never
- C. I don't know
- D. Whenever a customer complains
- E. After the customer leaves the store

MONITOR PROCEDURAL ASPECTS OF SERVICE DELIVERY FOR EFFECTIVENESS AND SUITABILITY TO CUSTOMER REQUIREMENTS



When monitoring the procedural aspects of service delivery for effectiveness and suitability to meet the customer requirements, there are four steps that will help you monitor this.

THE FOUR STEPS TO MONITORING

1. ESTABLISH WHERE MONITORING IS NEEDED

The key point for a manager in monitoring the implementation of service improvement plans is identifying where monitoring is needed. In order to identify the areas that require monitoring, ask yourself the following questions:

What are the most important areas in my service improvement plans? Are they:

- team member service behaviours
 - Improving product quality
 - Increasing sales
 - Improving service timeliness
 - Improving service flow
 - Reducing customer complaints
 - Other
- What would be the impact if the service improvement plan went wrong?
- How do these areas support the organisation's service strategy?

2. ESTABLISH THE MEASURES

Using the answers to the questions above, identify what should be monitored. Remember that your measures should monitor the key areas that you have identified in the first step, including those that support the organisation's service strategy. Measure the most important things that will help you to meet your goals, and make sure the measures give you accurate and timely information. One useful method of gathering data is to use both formal and informal customer surveys. Informal surveys can be carried out by staff when they have finalized a sale with the customer by asking questions. Formal surveys using a written form or external group to do phone surveys and mystery shoppers are often best for developing a complete picture.

3. COMPARE

Compare what should be happening with what is happening. Remember that in any plan some variation to the planned outcome will occur. As a manager your role is to identify when this variation is important.

4. TAKE ACTION

If a variation is identified it may become necessary for you to take corrective action. You may need to:

- Give yourself some 'breathing time' to decide on the proper course of action (interim action)
- Change some of the service standards so that they meet customer needs more effectively (adaptive action)
- Remove negative influences that are affecting service performance, eg change a service offering to better accommodate customer demands (corrective action)
- Remove the cause of a potential performance shortfall, eg implement performance management procedures to address the non-performance of a team member (preventative action)
- Act to reverse a negative trend in the plan that is revealed by monitoring and prevent any future impact on customer satisfaction, eg implement a training plan to improve the ability of staff to manage customer complaints (contingency action)

Self-Test 3.4:

Monitoring service delivery is important So that you know whether colleagues/staff are providing ongoing/stable level of service to customers.

Is this statement:

- ☐ True
- ☐ False

Self-Test 3.5:

The 4 steps to monitoring service delivery are:

- ☐ Take action
- ☐ Establish the measures
- ☐ Assume
- ☐ Establish where monitoring is needed
- ☐ Compare
- ☐ Observe

REGULARLY SEEK CUSTOMER FEEDBACK AND USE TO IMPROVE THE PROVISION OF PRODUCTS AND SERVICES

So far we have looked at how important it is to find out what your customer thinks of your services and products. Customer service improvement, however, is a continuous cycle. In other words, when you receive feedback, you and your organisation need to act on this feedback, and not just file it away for later and do nothing with the feedback.

It is important that you regularly seek customer feedback on the service provided as well as your product. It is hoped that when you get the feedback that your customers will say that your services have improved. Having the feedback will help in your organisations continuous improvement.

Continuous improvement can be defined as the improvement of the quality of aspects of service (or the product). The improvement will not happen overnight—it's step-by-step. Ideally, improvements must be cost-efficient or cost neutral. Ideally too, it should not mean more work for staff but a change in the ways things are done. Customer feedback is sought continuously.

In other words, continuous improvement occurs when the quality management process is continually reviewed and improved.



Obtaining feedback is not enough. You will need to identify those work processes that are not working well—therefore resulting in the customer not getting satisfaction out of their interactions with your unit or organisation.

You would need to examine the following:

- Work processes may not adequately incorporate quality requirements
- The quality objectives may be incorrect or incomplete
- The established quality standards may be incorrect or incomplete
- The metrics used to measure quality may be incorrect or incomplete
- The quality assurance checklist may be inaccurate
- The quality process may be incorrect

Once you have identified where the quality management process can be improved, report your findings to your manager. Remember, continuous improvement occurs when the quality management process is continually reviewed and improved.

Any decision to modify a service or product needs to be based on evidence and this means an analysis of customer feedback.

Self-Test 3.6:

Why is feedback from customers important?

- A. So you can monitor customer satisfaction
- B. So you can avoid them if they come in the store
- C. So you can make any changes required when required
- D. So you know who the complainers are

ENSURE REPORTS ARE CLEAR, DETAILED AND CONTAIN RECOMMENDATIONS FOCUSED ON CRITICAL ASPECTS OF SERVICE DELIVERY

In order for the customer feedback you collect during research and monitoring activities to be useful, it must be collated and stored to become data that can be analysed and interpreted for the purposes of planning. Record keeping and the development of databases form an important part of this process. Electronic media has taken the storage and retrieval of information and data to new



heights and in today's global economy it is essential that managers are able to fully utilise current technology.

Maintaining records and reports in an efficient and accessible way will help you to support service strategies, examples of which are outlined below.

- Adjustments and changes can be continually made in order to meet current customer needs and market circumstances. These changes must be reported to your staff. Then they know of impending change and the reasons for it, thereby ensuring smooth application of new methods and procedures
- Keeping records of various service improvement initiatives means that you can also keep track of what has been tried and compare the success of different initiatives. For instance, you may have implemented a system to track the time to complete a service interaction. Comparing service times before and after you have streamlined service processes will help you to work out if the new processes are working
- You can determine what information you need and obtain and keep only that information that is appropriate for reliable decision-making. Essential information provides up-to-date information on customer buying habits and the level of stock required to ensure regular, reliable service where and when the customer needs it. It also avoids the inconvenience and embarrassment of being overstocked or out of stock
- Organisations usually work well where a common base of information is available. Sharing information means that all employees understand the goals they are working towards and what is required of them. This eliminates the risk of employees undertaking activities that work against the achievement of service objectives simply because they misunderstand what is expected of them. Where there is good coordination and clarity as to what needs to be achieved, the result is that employees work together well in service teams

The report should include the following:

- The deficiencies or errors you have identified within the quality management process
- The causes of those errors or deficiencies
- Your recommendations for rectifying the problems for the future

Self-Test 3.7:

What types of things wouldn't you need to report in business?

- Tea breaks
- Complaints

- Staff absences
- Feedback

SUMMARY

Now that you have completed this unit you should have the skills and knowledge required to identify customer needs and monitor service provided to customers. Operators may exercise discretion and judgment using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over either a short or long term interaction.

If you have any questions about this unit please contact your trainer. They will be only too happy to assist you when required.