

<b>Training Package</b>	Business Services (BSB07)	<b>HSC Requirements and Advice</b>
<b>Unit code</b>	<b>Unit title</b>	<b>HSC Indicative Hours</b>
<b>BSBCUS201A</b>	<b>Deliver a service to customers</b>	<b>15</b>

<b>Unit descriptor</b>	This unit describes the performance outcomes, skills and knowledge required to deliver all aspects of customer service at an introductory level. It includes creating a relationship with customers, identifying their needs, delivering services or products and processing customer feedback. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
<b>Competency field</b>	Stakeholder Relations – Customer Service
<b>Application of the unit</b>	This unit applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of customer service in a defined context under direct supervision or with limited individual responsibility.
<b>Employability skills</b>	This unit contains employability skills.

<b>Evidence Guide</b>			
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.			
<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<b>Context of and specific resources for assessment</b>	<b>Method of assessment</b>	<b>Gather information for assessment</b>
Evidence of the following is essential: <ul style="list-style-type: none"> <li>demonstrating all stages of customer service interactions</li> <li>responding to customer feedback</li> <li>demonstrating a range of interpersonal skills</li> <li>knowledge of relevant legislation.</li> </ul>	Assessment must ensure: <ul style="list-style-type: none"> <li>access to an actual workplace or simulated environment</li> <li>access to office equipment and resources</li> <li>examples of customer complaints and policies relating to customer service.</li> </ul>	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: <ul style="list-style-type: none"> <li>direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate</li> <li>analysis of responses to case studies and scenarios</li> <li>demonstration of techniques</li> <li>observation of presentations</li> <li>oral or written questioning to assess knowledge of customer service and communication techniques</li> <li>review of information provided to customers about problems and delays, and customer follow up</li> <li>review of documentation recording feedback and communication between customers and the organisation.</li> </ul>	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: <ul style="list-style-type: none"> <li>sales units</li> <li>other customer service units.</li> </ul>

<b>Required Skills and Knowledge</b>		<b>HSC Requirements and Advice</b>
This section describes the skills and knowledge <u>required</u> for this unit.		
<p><b>Required skills</b></p> <ul style="list-style-type: none"> <li>• communication skills to convey meaning clearly, concisely and coherently</li> <li>• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities</li> <li>• literacy skills to communicate with customers and to develop required product knowledge</li> <li>• numeracy skills to interpret customer requirements and to meet customer needs</li> <li>• problem solving skills to deal with customer enquiries or complaints.</li> </ul>	<p><b>Required knowledge</b></p> <ul style="list-style-type: none"> <li>• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:               <ul style="list-style-type: none"> <li>- anti discrimination legislation</li> <li>- ethical principles</li> <li>- codes of practice</li> <li>- privacy laws</li> <li>- occupational health and safety (OHS)</li> </ul> </li> <li>• organisational policies and procedures relating to customer service and the customer service process.</li> </ul>	<p><b>Key Terms and Concepts</b></p> <ul style="list-style-type: none"> <li>• customer feedback</li> <li>• customer service</li> <li>• customers/clients</li> <li>• interpersonal skills</li> <li>• needs and preferences</li> <li>• communication</li> <li>• personal presentation</li> <li>• quality service</li> <li>• recording information.</li> </ul>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
1 Establish contact with customers	1.1 Acknowledge and greet <i>customer</i> in a professional, courteous and concise manner according to <i>organisational requirements</i> .	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <b><i>Bold italicised</i></b> wording, if used in the performance criteria, is detailed below.</p> <p>Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p> <p><b><i>Customers</i></b> may include:</p> <ul style="list-style-type: none"> <li>• contacts from other organisations</li> <li>• external customers</li> <li>• internal customers</li> <li>• members of the public</li> <li>• patients</li> <li>• service users.</li> </ul> <p><b><i>Organisational requirements</i></b> may include:</p> <ul style="list-style-type: none"> <li>• access and equity principles and practice</li> <li>• anti discrimination and related policy</li> <li>• following OHS procedures for dealing with customers</li> <li>• legal and organisational policies, guidelines and requirements</li> <li>• quality and continuous improvement processes and standards</li> <li>• quality assurance and/or procedures manual.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Types of customers/clients including:</p> <ul style="list-style-type: none"> <li>• internal <ul style="list-style-type: none"> <li>- workmates/colleagues/employees</li> <li>- other departments</li> </ul> </li> <li>• external <ul style="list-style-type: none"> <li>- members of the public</li> <li>- service users</li> <li>- contacts from other organisations.</li> </ul> </li> </ul> <p>A knowledge of:</p> <ul style="list-style-type: none"> <li>• workplace/organisation policy and procedures in relation to establishing contact with customers/clients</li> <li>• industry codes of practice in relation to quality customer service.</li> </ul> <p>Industry standards for workplace interaction including:</p> <ul style="list-style-type: none"> <li>• courtesy</li> <li>• discretion</li> <li>• confidentiality</li> <li>• structured follow-up procedures.</li> </ul>
	1.2 Maintain personal dress and presentation in line with organisational requirements.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Personal presentation, image and hygiene standards required in the workplace including:</p> <ul style="list-style-type: none"> <li>• personal hygiene and grooming</li> <li>• attitude</li> <li>• clothing/uniform</li> <li>• etiquette.</li> </ul>

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			Appropriate dress standards for the business services industry.
	1.3 Communicate using appropriate <i>interpersonal skills</i> to facilitate accurate and relevant exchange of information.	<p><i>Interpersonal skills</i> may include:</p> <ul style="list-style-type: none"> <li>• listening actively to what the customer is communicating</li> <li>• providing an opportunity for the customer to confirm their request</li> <li>• questioning to clarify and confirm customer needs</li> <li>• seeking feedback from the customer to confirm understanding of needs</li> <li>• summarising and paraphrasing to check understanding of customer's message</li> <li>• using appropriate body language.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Define:</p> <ul style="list-style-type: none"> <li>• interpersonal skills.</li> </ul> <p>Effective verbal and nonverbal communication.</p> <p>The importance of communicating in language that is:</p> <ul style="list-style-type: none"> <li>• clear</li> <li>• concise</li> <li>• purposeful</li> <li>• correct</li> <li>• courteous</li> <li>• culturally sensitive.</li> </ul> <p>Communication skills to enable quality customer service:</p> <ul style="list-style-type: none"> <li>• listening actively to what the customer/client is communicating</li> <li>• providing an opportunity for the customer/client to confirm their request</li> <li>• questioning to clarify and confirm customer/client needs</li> <li>• seeking feedback from the customer/client to confirm understanding of needs</li> <li>• summarising and paraphrasing to check understanding of customer/client's message</li> <li>• using appropriate body language.</li> </ul>
	1.4 Maintain sensitivity to customer specific needs and any cultural, family and individual differences.		<p><b>Learning experiences for the HSC must address:</b></p> <p>An understanding of the difference between preferences, needs and expectations.</p> <p>Factors influencing needs and expectations including:</p> <ul style="list-style-type: none"> <li>• social</li> <li>• cultural</li> <li>• economic</li> <li>• health</li> </ul>

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	<p>1.5 Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements.</p>		<ul style="list-style-type: none"> <li>• age</li> <li>• personality</li> <li>• personal interests</li> <li>• likes and dislikes</li> <li>• available time</li> <li>• perceptions.</li> </ul> <p><b>Learning experiences for the HSC must address:</b></p> <p>Personal attributes that will assist employees to be responsive to customer/client needs including:</p> <ul style="list-style-type: none"> <li>• sincerity</li> <li>• confidence</li> <li>• enthusiasm</li> <li>• efficiency</li> <li>• empathy</li> <li>• interest in other people.</li> </ul>
<p>2 Identify customer needs</p>	<p>2.1 Use appropriate questioning and active listening to determine customer needs.</p> <p>2.2 Assess customer needs for urgency to identify priorities for service delivery.</p> <p>2.3 Provide customer with information about available options for meeting customer needs and assist customer to identify preferred option/s</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Establishing customer/client preferences, needs and expectations through:</p> <ul style="list-style-type: none"> <li>• active listening</li> <li>• using open, closed and reflective questions</li> <li>• observation and recognition of nonverbal signs.</li> </ul> <p>A range of customers/clients with different needs, preferences and expectations.</p> <p>An understanding of the differing needs of internal and external customers/clients.</p> <p><b>Learning experiences for the HSC must address:</b></p> <p>Matching preferences, needs and expectations with the most suitable product or service by knowing customer/client and product/services.</p> <p>Effective responses to a range of enquiries and requests.</p>

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	2.4 Identify personal limitations in addressing customer needs and seek assistance from <i>designated persons</i> where required.	<p><i>Designated persons</i> may include:</p> <ul style="list-style-type: none"> <li>• manager, supervisor or team leader</li> <li>• more experienced personnel with specific knowledge or information</li> <li>• staff from other work areas with particular product or service knowledge.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>How and when to seek assistance.</p> <p>The importance of acting within level of authority in terms of:</p> <ul style="list-style-type: none"> <li>• taking initiative</li> <li>• problem-solving</li> <li>• decision-making.</li> </ul>
3 Deliver service to customers	3.1 Provide prompt customer service to meet identified needs according to organisational requirements.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Quality service:</p> <ul style="list-style-type: none"> <li>• definition of customer/client-focused service</li> <li>• characteristics of quality service</li> <li>• customer service skills, including: <ul style="list-style-type: none"> <li>- meeting customer/client requirements</li> <li>- handling customer/client requests and complaints</li> <li>- developing rapport</li> <li>- promoting suitable products and services</li> </ul> </li> <li>• responsibilities of the workplace/organisation and staff for service</li> <li>• contribution of staff behaviour in delivering quality customer service</li> <li>• ethics of professional service behaviour</li> <li>• work ethic</li> <li>• importance of quality customer service to the business services industry.</li> </ul> <p>Benefits of good customer service including:</p> <ul style="list-style-type: none"> <li>• promoting goodwill</li> <li>• customer/client loyalty/repeat business</li> <li>• new business</li> <li>• productivity</li> <li>• credibility</li> <li>• promoting workplace/organisation service ethic.</li> </ul> <p>An understanding of factors that customers/clients expect in good service including:</p> <ul style="list-style-type: none"> <li>• individualised attention</li> <li>• price</li> <li>• quality</li> <li>• product knowledge</li> </ul>

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			<ul style="list-style-type: none"> <li>• presentation</li> <li>• polite and courteous service</li> <li>• efficiency</li> <li>• consistency.</li> </ul> <p>Establishing good customer service practices including knowledge of:</p> <ul style="list-style-type: none"> <li>• enterprise policies and procedures</li> <li>• enterprise products/services including: <ul style="list-style-type: none"> <li>- advice about warranties, guarantees or support services</li> <li>- packaging options</li> <li>- pricing options</li> <li>- delivery options</li> </ul> </li> <li>• customer/client base</li> <li>• customer/client interaction protocols including <ul style="list-style-type: none"> <li>- language that is targeted to the specific customer/client</li> <li>- greeting, closing and farewelling procedures/techniques</li> <li>- friendly and courteous manner</li> <li>- positive gestures and body language</li> </ul> </li> <li>• request/enquiry processes and procedures including <ul style="list-style-type: none"> <li>- maintaining and tracking records</li> <li>- solutions-oriented approach</li> <li>- prompt response to resolve complaints</li> <li>- follow-up to maximise customer/client satisfaction.</li> </ul> </li> </ul> <p>Effective responses to a range of different customer service situations.</p>
	3.2 Provide information regarding problems and delays, and follow up within appropriate timeframes as necessary.		
	3.3 Communicate with customers in a clear, concise and courteous manner.		
	3.4 Identify <i>opportunities</i> to enhance the quality of service and products, and take action to improve the service whenever possible.	<p><i>Opportunities</i> may include:</p> <ul style="list-style-type: none"> <li>• advice about warranties, guarantees or support services</li> <li>• packaging options</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>An understanding of:</p> <ul style="list-style-type: none"> <li>• the relationship between customer service and business success</li> </ul>

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		<ul style="list-style-type: none"> <li>• pricing options</li> <li>• procedures for delivery of goods or service provision of product knowledge</li> <li>• systems for recording complaints.</li> </ul>	<ul style="list-style-type: none"> <li>• the concept of a 'customer/client-focused' workplace/organisation.</li> </ul>
4 Process customer feedback	4.1 Promptly recognise <i>customer feedback</i> and handle sensitively according to organisational requirements.	<p><i>Customer feedback</i> may be about:</p> <ul style="list-style-type: none"> <li>• damaged goods or delivery problems</li> <li>• delays</li> <li>• invoicing errors</li> <li>• quality of customer service</li> <li>• quality of service provision.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>The type of feedback received from customers/clients including:</p> <ul style="list-style-type: none"> <li>• formal/informal</li> <li>• direct/indirect</li> <li>• positive/negative.</li> </ul> <p>Recognition of the value of complaints/customer feedback to the workplace/organisation including:</p> <ul style="list-style-type: none"> <li>• improving business relationships</li> <li>• identifying and overcoming existing problems</li> <li>• eliminating entrenched work practices</li> <li>• improving productivity</li> <li>• enhancing output quality</li> <li>• future development of the workplace/organisation and the employees.</li> </ul> <p>Common causes of customer/client dissatisfaction and complaints.</p> <p>An understanding of the importance of:</p> <ul style="list-style-type: none"> <li>• business services staff and the customer/client agreeing on what is to be done in regard to the complaint</li> <li>• implementing solutions within acceptable time frames.</li> </ul> <p>Procedures for handling customer/client complaints:</p> <ul style="list-style-type: none"> <li>• listen</li> <li>• acknowledge</li> <li>• identify nature of problem</li> <li>• identify and agree on an acceptable solution</li> <li>• action</li> <li>• record</li> <li>• follow-up to maximise customer/client satisfaction.</li> </ul>

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			<p>Techniques for handling difficult or abusive customers/clients.</p> <p>An understanding of the purpose of workplace/organisation complaints handling policy and procedures.</p> <p>Effective responses to typical customer/client complaints in business services industry workplace/organisation.</p> <p>The benefits of following-up with customers/clients post-resolution.</p> <p>How and when to seek assistance for issues that cannot be resolved effectively.</p>
	<p>4.2 Accurately record any feedback and communication between customers and the organisation according to organisational standards, policies and procedures.</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Receiving requests, enquiries and complaints through:</p> <ul style="list-style-type: none"> <li>• telephone</li> <li>• workplace forms (paper and electronic)</li> <li>• electronic mail</li> <li>• face-to-face</li> <li>• memoranda</li> <li>• facsimile</li> <li>• handwritten notes/letters.</li> </ul> <p>An understanding of the importance of documenting complaints and incidents.</p> <p>The importance of recording information that is:</p> <ul style="list-style-type: none"> <li>• clear</li> <li>• legible</li> <li>• accurate</li> <li>• concise</li> <li>• appropriate in terms of industry terminology and abbreviations.</li> </ul> <p>Knowledge of paper-based and electronic means for recording customer/client details and their requests/enquiries/complaints.</p>

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	4.3 Identify any unmet customer needs and discuss suitability of other products/ services.		
	4.4 Support customers to make contact with other services according to organisational policies and procedures.		<p><b>Learning experiences for the HSC must address:</b></p> <p>An understanding of the type of knowledge required to be able to refer a customer/client within a workplace/ organisation:</p> <ul style="list-style-type: none"> <li>• scope of responsibility, allocated duties and area of expertise of other staff</li> <li>• product(s) and service(s) provided in other areas/ sections/departments of the workplace/organisation.</li> </ul>