

<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>BSBCUS301A</b>	<b>Deliver and monitor a service to customers</b>	<b>20</b>

<b>Unit descriptor</b>	This unit describes the performance outcomes, skills and knowledge required to identify customer needs and monitor service provided to customers. 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 are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over either a short or long term interaction.
<b>Employability skills</b>	This unit contains employability skills.

### Evidence Guide

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>
<p>Evidence of the following is <u>essential</u>:</p> <ul style="list-style-type: none"> <li>identifying needs and priorities of customers</li> <li>distinguishing between different levels of customer satisfaction</li> <li>treating customers with courtesy and respect</li> <li>responding to and reporting on, customer feedback</li> <li>knowledge of organisational policy and procedures for customer service.</li> </ul>	<p>Assessment <u>must</u> ensure:</p> <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</li> <li>examples of documents relating to customer service standards and policies.</li> </ul>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <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>review of reports on customer service delivery</li> <li>analysis of responses to case studies and scenarios</li> <li>demonstration of techniques</li> <li>oral or written questioning to assess knowledge of customer service strategies.</li> </ul>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> <li>sales units</li> <li>other customer service units.</li> </ul>

## Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

### Required skills

- literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation
- technology skills to select and use technology appropriate to a task
- communication skills to monitor and advise on customer service strategies
- problem solving skills to deal with customer enquiries or complaints
- analytical skills to identify trends and positions of products and services.

### 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.

Element	Performance Criteria	Range Statement
1 Identify customer needs	1.1 Use <i>appropriate interpersonal skills</i> to accurately identify and clarify <i>customer needs and expectations</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>Appropriate interpersonal skills</i></b> 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 message</li> <li>• using appropriate body language.</li> </ul> <p><b><i>Customers</i></b> may include:</p> <ul style="list-style-type: none"> <li>• corporate customers</li> <li>• individual members of the organisation</li> <li>• individual members of the public</li> <li>• internal or external</li> <li>• other agencies.</li> </ul> <p><b><i>Customer needs and expectations</i></b> may include:</p> <ul style="list-style-type: none"> <li>• accuracy of information</li> <li>• advice or general information</li> <li>• complaints</li> <li>• fairness/politeness</li> <li>• further information</li> <li>• making an appointment</li> <li>• prices/value</li> <li>• purchasing organisation's products and services</li> <li>• returning organisation's products and services</li> <li>• specific information.</li> </ul>
	1.2 Assess customer needs for urgency to determine priorities for service delivery in accordance with <i>organisational requirements</i> .	<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>• defined resource parameters</li> <li>• goals, objectives, plans, systems and processes</li> </ul>

Element	Performance Criteria	Range Statement
		<ul style="list-style-type: none"> <li>• legal and organisational policies, guidelines and requirements</li> <li>• OHS policies, procedures and programs</li> <li>• payment and delivery options</li> <li>• pricing and discount policies</li> <li>• quality and continuous improvement processes and standards</li> <li>• quality assurance and/or procedures manuals</li> <li>• replacement and refund policy and procedures</li> <li>• who is responsible for products or services.</li> </ul>
	<p>1.3 Use <i>effective communication</i> to inform customers about available choices for meeting their needs and assist in the selection of preferred options.</p>	<p><i>Effective communication</i> may include:</p> <ul style="list-style-type: none"> <li>• giving customers full attention</li> <li>• maintaining eye contact, except where eye contact may be culturally inappropriate</li> <li>• speaking clearly and concisely</li> <li>• using active listening techniques</li> <li>• using appropriate language and tone of voice</li> <li>• using clear written information/communication</li> <li>• using non verbal communication e.g. body language, personal presentation (for face to face interactions)</li> <li>• using open and/or closed questions.</li> </ul>
	<p>1.4 Identify limitations in addressing customer needs and seek appropriate assistance from <i>designated individuals</i>.</p>	<p><i>Designated individuals</i> may include:</p> <ul style="list-style-type: none"> <li>• colleagues</li> <li>• customers</li> <li>• line management</li> <li>• supervisor.</li> </ul>
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 <i>customer complaints</i> in accordance with organisational requirements.</p>	<p><i>Customer complaints</i> may include:</p> <ul style="list-style-type: none"> <li>• administrative errors such as incorrect invoices or prices</li> <li>• customer satisfaction with service quality</li> <li>• damaged goods or goods not delivered</li> <li>• delivery errors</li> <li>• product not delivered on time</li> <li>• service errors</li> <li>• warehouse or store room errors such as incorrect product delivered.</li> </ul>

Element	Performance Criteria	Range Statement
	2.4 Provide assistance or respond to customers with <i>specific needs</i> in accordance with organisational requirements.	<p><i>Specific needs</i> of customers may relate to:</p> <ul style="list-style-type: none"> <li>• age</li> <li>• beliefs/values</li> <li>• culture</li> <li>• disability</li> <li>• gender</li> <li>• language</li> <li>• religious/spiritual observances.</li> </ul>
	2.5 Identify and use available <i>opportunities</i> to promote and enhance services and products to customers.	<p><i>Opportunities</i> to promote and enhance services and products may include:</p> <ul style="list-style-type: none"> <li>• extending time lines</li> <li>• packaging procedures</li> <li>• procedures for delivery of goods</li> <li>• returns policy</li> <li>• system for recording complaints</li> <li>• updating customer service charter.</li> </ul>
3 Monitor and report on service delivery	3.1 Regularly review customer satisfaction with service delivery using <i>verifiable evidence</i> in accordance with organisational requirements.	<p><i>Verifiable evidence</i> may include:</p> <ul style="list-style-type: none"> <li>• customer satisfaction questionnaires</li> <li>• audit documentation and reports</li> <li>• quality assurance data</li> <li>• returned goods</li> <li>• lapsed customers</li> <li>• service calls</li> <li>• complaints.</li> </ul>
	3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational requirements.	
	3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements.	
	3.4 Regularly seek customer feedback and use to improve the provision of products and services.	
	3.5 Incorporate evidence of customer satisfaction in decisions to modify products or services, ensuring they are within organisational requirements.	
	3.6 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery.	