

**Sample Program                      Communicating with clients**

**Rationale:**        This theme is intended to provide the opportunity for students to develop knowledge and skills required to communicate appropriately and effectively in their interactions with clients including providing advice and support in an information technology environment.

**Units of competency:**    ICAW2002A    Communicate in the workplace  
                                           ICAS3031A    Provide advice to clients

**HSC Requirements and Advice – Key terms and concepts:**

Communicate in the workplace		Provide advice to clients	
<ul style="list-style-type: none"> <li>• access and equity principles</li> <li>• active listening</li> <li>• appropriate persons</li> <li>• audit trails</li> <li>• barriers to effective communication</li> <li>• benefits of good customer service</li> <li>• client base</li> <li>• client interaction protocols</li> <li>• communication methods and equipment</li> <li>• communication process/cycle</li> <li>• cultural differences</li> <li>• cultural groups in Australian society</li> <li>• current business practice for preparation of documentation</li> <li>• decision-making</li> <li>• enquiry</li> <li>• good customer service practices</li> <li>• internal and external client</li> <li>• lines of reporting</li> <li>• naming standards</li> <li>• negotiation</li> <li>• non-verbal communication</li> <li>• open, closed and reflective questions</li> <li>• organisational policies and procedures</li> </ul>	<ul style="list-style-type: none"> <li>• organisational systems, values and code of conduct</li> <li>• personal attributes</li> <li>• preferences, needs and expectations</li> <li>• prioritising</li> <li>• proactive strategies</li> <li>• problem-solving</li> <li>• processing internal and external requests/enquiries</li> <li>• products and services</li> <li>• receiving request/enquiry</li> <li>• recording and reporting</li> <li>• request</li> <li>• scope of responsibility</li> <li>• structured follow-up</li> <li>• tolerance and respect</li> <li>• tracking processes</li> <li>• turnaround times</li> <li>• vendor applications</li> <li>• verbal communication</li> <li>• version control</li> <li>• work ethics</li> <li>• workplace documentation</li> <li>• written communication.</li> </ul>	<ul style="list-style-type: none"> <li>• acceptable timeframes</li> <li>• advanced features and functions of software</li> <li>• advice and support</li> <li>• approval policies and procedures</li> <li>• audit trails</li> <li>• basic features and functions of operating system</li> <li>• benefits and limitations of solutions</li> <li>• benefits of client feedback</li> <li>• benefits of good customer service</li> <li>• client feedback</li> <li>• client needs analysis/assessment</li> <li>• client support issues</li> <li>• constraints</li> <li>• contract and service agreements with vendors</li> <li>• details to be documented</li> <li>• features of different types of hardware</li> <li>• good customer service</li> <li>• interaction with client</li> <li>• internal and external clients</li> <li>• investigation</li> <li>• investigation methods</li> </ul>	<ul style="list-style-type: none"> <li>• known solutions to predictable problems</li> <li>• log</li> <li>• macros and templates</li> <li>• manuals and help documentation</li> <li>• methods to obtain client feedback</li> <li>• naming standards</li> <li>• paper-based and electronic records</li> <li>• personal attributes</li> <li>• problem-solving</li> <li>• report writing</li> <li>• research skills</li> <li>• review client feedback</li> <li>• security and network guidelines and procedures</li> <li>• sources of information</li> <li>• standards for workplace documentation</li> <li>• technical information</li> <li>• technical support</li> <li>• tracking process</li> <li>• verbal and non-verbal communication</li> <li>• version control.</li> </ul>

**Assessment:**

Unit/element of competency	Possible assessment strategy
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b></p> <p><b>2 Process information</b></p> <p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b></p> <p><b>2 Provide advice on software, hardware or network</b></p> <p><b>3 Obtain client feedback</b></p>	<p><b>Task 1</b>    <i>Simulated Online helpdesk</i></p> <p>Throughout the year the class will run a helpdesk operation for the school’s IT facilities including software, hardware and network support and advice. Individual students will be rostered on to support the helpdesk operation. Each student will be assessed on their ability to clearly and effectively provide advice and support to clients using effective communication techniques.</p> <p>All students are to maintain an electronic record of all help desk operations in a centralised database. Details to be recorded include:</p> <ul style="list-style-type: none"> <li>• client/contact details</li> <li>• the requests/enquiries/problems</li> <li>• support issues identified             <ul style="list-style-type: none"> <li>– software, hardware and/or network requirements</li> <li>– additional requirements identified during investigation</li> </ul> </li> <li>• progress of each task</li> <li>• authorisation procedures</li> <li>• action taken</li> <li>• technical support provided.</li> </ul> <p>Each student will keep a personal reflective journal for self-assessment including:</p> <ul style="list-style-type: none"> <li>• a hard copy record of all logged tasks</li> <li>• outline and evaluation of methods used to investigate support issues</li> <li>• outline of communication and interaction with clients.</li> </ul> <p>Students are to develop a simple client feedback mechanism covering:</p> <ul style="list-style-type: none"> <li>• effectiveness of communication             <ul style="list-style-type: none"> <li>– language</li> <li>– manner</li> </ul> </li> <li>• prompt and efficient service</li> <li>• informing client of the status of their request</li> <li>• quality of advice and support</li> <li>• level of customer service</li> <li>• follow-up support</li> <li>• client satisfaction.</li> </ul>

Unit/element of competency	Possible assessment strategy
	<p>This will be used to seek feedback from each client after support is provided. At the end of the task students will collate a report of the feedback they received and undertake a self-evaluation of their own performance identifying strengths and areas for improvement.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>                      1.2 Use verbal and non-verbal communication to respond to the client requests and enquiries effectively</p> <p><b>2 Process information</b>                      2.1 Answer enquiries promptly and appropriately                      2.4 Investigate the organisational follow-up procedures or policy and record follow-up action taken in regard to the client request or enquiry</p> <p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b>                      1.1 Check for new problems logged by client                      1.3 Investigate and document the support issues affecting the client                      1.4 Notify client of the results of investigation and provide advice and support on findings</p> <p><b>2 Provide advice on software, hardware or network</b>                      2.2 Investigate and document a solution                      2.3 Document additional requirements discovered in the investigation and refer them to the client                      2.9 Provide manuals and help documentation to the client</p>	<p><b>Task 2</b>     <i>Hardware and software support case study</i></p> <p>Students are provided with a scenario outlining a hardware and software problem requiring support. They will be required to analyse this case study and report on the following</p> <ul style="list-style-type: none"> <li>• identification and description of the problem</li> <li>• analysis of the client’s support needs</li> <li>• investigation and research of the problem</li> <li>• possible solutions</li> <li>• outline of the course of action to be undertaken including                             <ul style="list-style-type: none"> <li>– advice to be provided</li> <li>– action to be undertaken</li> <li>– methods of communication</li> <li>– follow up strategies</li> </ul> </li> <li>• a written response to the client</li> <li>• a resource list relating to the particular problem to help support the client.</li> </ul>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>                      1.4 Accommodate cultural differences in the workplace</p>	<p><b>Task 3</b>     <i>Cultural diversity</i></p> <p>Students are to research a culture (different to their own) from their local community or one of Australia’s major trade partners (China, Japan, Indonesia, UK, USA, Saudi Arabia, United Arab Emirates, Turkey, Iran, Canada, Korea, Qatar, India) and compile a profile of the culture including:</p> <ul style="list-style-type: none"> <li>• traditions, customs, beliefs and values</li> <li>• demographic representation in Australia</li> <li>• methods of communicating with individuals from this background</li> <li>• potential cross-cultural misunderstandings and cultural issues that may arise in the workplace.</li> </ul>

**Assessment checklist:**

Unit/Element of Competency	Task 1	Task 2	Task 3
<b>ICAS3031A Provide advice to clients</b>			
<i>1 Analyse client support issues</i>			
1.1 Check for new problems logged by client	✓	✓	
1.2 Check previous logs for similar problems or requests from client	✓		
1.3 Investigate and document the support issues affecting the client	✓	✓	
1.4 Notify client of the results of investigation and provide advice and support on findings	✓		
1.5 Obtain client feedback and make changes	✓		
<i>2 Provide advice on software, hardware or network</i>			
2.1 Confirm software, hardware or network requirements with client	✓		
2.2 Investigate and document a solution	✓	✓	
2.3 Document additional requirements discovered in the investigation and refer them to the client	✓	✓	
2.4 Obtain approval from the client to implement the solution	✓		
2.5 Investigate and document the amount of technical support the client may require	✓		
2.6 Discuss and agree the level of technical support identified with the client	✓		
2.7 Arrange a time with the client when support will take place	✓		
2.8 Provide technical support as part of group or one to one instruction to the client	✓		
2.9 Provide manuals and help documentation to the client	✓	✓	
<i>3 Obtain client feedback</i>			
3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about the solution and support provided	✓		
3.2 Provide client with instructions on how to complete the form or use other means of providing feedback	✓		
3.3 Distribute the evaluation or feedback to the client	✓		
3.4 Review the feedback from the client to identify areas for improvement	✓		

Unit/Element of Competency	Task 1	Task 2	Task 3
<b>ICAW2002A Communicate in the workplace</b>			
<i>1 Establish contact with clients</i>			
1.1 Receive requests and enquiries from clients in a polite and appropriate manner	✓		
1.2 Use verbal and non verbal communication to respond to the client requests and enquiries effectively	✓	✓	
1.3 Use appropriate questioning and active listening techniques to understand client needs and determine support requirements	✓		
1.4 Accommodate cultural differences in the workplace	✓		✓
<i>2 Process information</i>			
2.1 Answer enquiries promptly and appropriately	✓	✓	
2.2 Record information or messages and refer client requests to the appropriate person in accordance with organisational procedures	✓		
2.3 Inform client of the progress of their request or enquiry and advise them of the organisational process for answering their request or enquiry	✓		
2.4 Investigate the organisational follow up procedure or policy and record follow up action taken in regard to the client request or enquiry	✓		

Unit / Element of competency / Performance criteria	Content	Possible learning experiences / activities
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>                      1.1 Receive requests and enquiries from clients in a polite and appropriate manner                      2.1 Answer enquiries promptly and appropriately</p> <p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b>                      1.1 Check for new problems logged by client</p>	<p><b>Interacting with clients</b></p> <p>Importance of communication in an information and communication technology (ICT) industry or environment.</p> <p>Types of clients :</p> <ul style="list-style-type: none"> <li>• internal                             <ul style="list-style-type: none"> <li>- workmates/colleagues/employees</li> <li>- departments</li> </ul> </li> <li>• external.</li> </ul> <p>Personal attributes and work ethics of ICT staff:</p> <ul style="list-style-type: none"> <li>• attendance and punctuality</li> <li>• ethical behaviour</li> <li>• courtesy</li> <li>• honesty</li> <li>• work performance</li> <li>• taking directives</li> <li>• attention to detail</li> <li>• personal presentation and grooming</li> <li>• attitude</li> <li>• discretion</li> <li>• confidentiality</li> <li>• consistency of service</li> <li>• safe working practices.</li> </ul> <p>Personal attributes that will assist employees to be responsive to client needs:</p> <ul style="list-style-type: none"> <li>• sincerity</li> <li>• confidence</li> <li>• enthusiasm</li> <li>• efficiency</li> <li>• interest in other people.</li> </ul>	<p>Class discussion.</p> <p>Explore the definition of a client in the ICT industry.</p> <p>Discuss the differences between internal and external clients.</p> <p>Brainstorm the personal attributes and work ethics that are needed for employment in the ICT industry.</p> <p>Students discuss personal experiences where they have received poor service from an individual who has not displayed the personal attributes required by the industry. How did it make you feel as a client ?</p> <p>Discuss the importance of being responsive to clients.</p>

Unit / Element of competency / Performance criteria	Content	Possible learning experiences / activities
	<p>Establishing good work habits through knowledge of the company/organisation:</p> <ul style="list-style-type: none"> <li>• product range and service(s) offered</li> <li>• client base</li> <li>• greeting and closing procedures</li> <li>• client interaction protocols</li> <li>• request/enquiry records and tracking</li> <li>• request/enquiry procedures.</li> </ul> <p>Broad knowledge of vendor applications and their features.</p> <p>A broad knowledge of organisational systems, values and code of conduct in relation to establishing contact with clients.</p>	<p>Identify the type company/organisation knowledge that will improve work habits and discuss ways of developing this knowledge.</p> <p>Brainstorm examples then create a mind map of vendor applications and their features.</p> <p>Review some sample codes of conduct and organisational systems. Students then develop an industry induction kit for new employees focusing on contact with clients.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b></p> <p>1.4 Accommodate cultural differences in the workplace</p>	<p><b>Cultural diversity</b></p> <p>A basic understanding of the concepts of:</p> <ul style="list-style-type: none"> <li>• cultural diversity</li> <li>• cultural differences</li> <li>• cultural awareness.</li> </ul> <p>An awareness of elements of cultural differences:</p> <ul style="list-style-type: none"> <li>• interpersonal relations</li> <li>• festival/celebrations</li> <li>• family structure/obligations</li> </ul>	<p>Class discussion considering cultural diversity and the cultural mix of the school and class.</p> <p>Share personal profile of cultural background:</p> <ul style="list-style-type: none"> <li>• place of birth</li> <li>• parents' birthplace(s)</li> <li>• language(s) spoken at home</li> <li>• food preferences</li> <li>• events celebrated through the year</li> <li>• family members' role and responsibilities</li> <li>• difficulties encountered.</li> </ul> <p>Small group discussion and feedback to class – discuss benefits of a multicultural society and workplace.</p> <p>Handout on the elements that contribute to cultural diversity.</p> <p>Link to Task 3.</p>

Unit / Element of competency / Performance criteria	Content	Possible learning experiences / activities
	<ul style="list-style-type: none"> <li>• language</li> <li>• religion</li> <li>• customs</li> <li>• social values</li> <li>• work ethic</li> <li>• communication</li> <li>• product/service preference.</li> </ul> <p>The importance of respecting individual difference arising from:</p> <ul style="list-style-type: none"> <li>• culture</li> <li>• race</li> <li>• language</li> <li>• gender</li> <li>• age</li> <li>• religious beliefs</li> <li>• customs/traditions</li> <li>• people with special needs.</li> </ul> <p>General characteristics of the different cultural groups in Australian society.</p> <p>An understanding for the need for tolerance and respect in the workplace.</p> <p>Proactive strategies for promoting workplace diversity and accommodating individual differences in the workplace:</p> <ul style="list-style-type: none"> <li>• staff training</li> <li>• utilising an individual’s difference/skills</li> <li>• using a range of communication media and techniques</li> <li>• promoting cultural celebrations and celebrating differences</li> </ul>	<p>Handout and class discussion.</p> <p>Guest speaker – community member from a local cultural group.</p> <p>Define tolerance and respect.</p> <p>Reflect on how you would like to be treated in the workplace and as a team member.</p> <p>Class discussion:</p> <ul style="list-style-type: none"> <li>• identify how different cultures show respect</li> <li>• consequences of insensitivity.</li> </ul> <p>Handout.</p> <p>Brainstorm and record strategies to promote workplace harmony aimed at recognising and accepting differences in individuals and their beliefs.</p>

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	<ul style="list-style-type: none"> <li>• actively seeking to break down barriers</li> <li>• developing a workplace culture of empathy and tolerance.</li> </ul>	
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>                      1.2 Use verbal and non-verbal communication to respond to the client requests and enquiries effectively</p>	<p><b>Communication</b></p> <p>Brief overview of the communication process/cycle:</p> <ul style="list-style-type: none"> <li>• sender</li> <li>• receiver</li> <li>• message</li> <li>• feedback.</li> </ul> <p>Barriers to effective communication:</p> <ul style="list-style-type: none"> <li>• bias and stereotyping</li> <li>• lack of empathy</li> <li>• negative subtext</li> <li>• gender issues</li> <li>• individual differences</li> <li>• inconsistency</li> <li>• emotions</li> <li>• physical barriers, eg noise</li> <li>• inattention</li> <li>• pressure of time.</li> </ul> <p>Types of communication:</p> <ul style="list-style-type: none"> <li>• verbal                             <ul style="list-style-type: none"> <li>- face-to-face</li> <li>- telephone</li> <li>- mobile phone</li> </ul> </li> </ul>	<p>Identify components of the communication process. Discuss the role and importance of each component.</p> <p>Observation of groups communicating in the school (eg social groups at the canteen). Discuss observations.</p> <p>Role-plays incorporating sending and receiving a message with and without feedback.</p> <p>Chinese whispers – on arrival at class students are told a story which they must convey to the next person entering the room. Observe what happens to the story as it progresses through the class.</p> <p>Stimulus material (eg comic strip, cartoon, snippets from a movie/TV show or video) to promote discussion of barriers to effective communication.</p> <p>Identify different forms of each type of communication.</p> <p>Class discussion of the advantages and disadvantages of a range of modes of communication.</p>

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	<ul style="list-style-type: none"> <li>- answering machine</li> <li>- paging system</li> <li>- team meeting</li> <li>- daily conversation</li> <li>• non-verbal</li> <li>• written                             <ul style="list-style-type: none"> <li>- direct mail/letters (general correspondence)</li> <li>- messages</li> <li>- electronic mail</li> <li>- internet/intranet</li> <li>- memoranda</li> <li>- facsimiles</li> <li>- client records</li> <li>- workplace forms/documents</li> <li>- reports.</li> </ul> </li> </ul> <p>Effective communication techniques in relation to non-verbal communication:</p> <ul style="list-style-type: none"> <li>• understanding body language</li> <li>• interpreting                             <ul style="list-style-type: none"> <li>- subtext</li> <li>- gestures</li> </ul> </li> <li>• standards of dress</li> <li>• use of personal space.</li> </ul> <p>The importance of communicating in a language that is:</p> <ul style="list-style-type: none"> <li>• clear</li> <li>• concise</li> <li>• directive</li> <li>• purposeful</li> <li>• correct</li> <li>• courteous</li> <li>• culturally sensitive.</li> </ul>	<p>Role-play – a range of situations:</p> <ul style="list-style-type: none"> <li>• dealing with client face-to-face</li> <li>• dealing with a client via the telephone</li> <li>• dealing with a client via the internet.</li> </ul> <p>Discuss ‘netiquette’ and the implications of using email as a prime source of communication.</p> <p>Review samples of different written forms of workplace communication media and discuss their use in the workplace.</p> <p>Discuss the elements of non-verbal communication.</p> <p>Role-play – several situations where body language is consistent and inconsistent with the verbal communication. Students discuss their observations</p> <p>Class activity – students play a game where they have to give their partner instructions on how to draw a picture (eg a spotted dog) without telling or showing them what the picture is of.</p> <p>Discuss the effective and ineffective communication strategies they used in the activity and how they could have improved them.</p> <p>Identify appropriate language for a range of situations:</p> <ul style="list-style-type: none"> <li>• in the workplace (with both colleagues and customers)</li> <li>• at home</li> <li>• in public</li> </ul>

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	<p>The importance of the following to verbal communication:</p> <ul style="list-style-type: none"> <li>• appropriate language</li> <li>• clear voice</li> <li>• audible volume</li> <li>• courteous tone</li> <li>• active listening</li> <li>• asking questions or rephrasing to clarify or confirm understanding.</li> </ul> <p>The importance of the following skills in written communication:</p> <ul style="list-style-type: none"> <li>• accurate spelling, grammar and punctuation</li> <li>• appropriate tone, format and style</li> <li>• sentence construction (short, simple and correct)</li> <li>• legible handwriting</li> <li>• plain English</li> <li>• avoid jargon</li> <li>• technical detail accompanied by explanation</li> <li>• proofreading and editing.</li> </ul> <p>An awareness of access and equity principles when communicating with people from diverse backgrounds and those with special needs.</p>	<ul style="list-style-type: none"> <li>• with close friends and family</li> <li>• with acquaintances.</li> </ul> <p>Role-play situations where verbal communication is effective and ineffective. Compare the outcomes for both the client and server.</p> <p>Students demonstrate their understanding of the communication process using appropriate language and tone for a variety of situations, for example:</p> <ul style="list-style-type: none"> <li>• greeting clients</li> <li>• situations where there is distraction or noise</li> <li>• communicating with a client who has minimal IT knowledge</li> <li>• providing instructions to a colleague</li> <li>• handling a client complaint face-to-face and over the phone.</li> </ul> <p>Students to write a piece of prose using an agreed text type on a subject of their choice, and then peer-evaluate using the checklist in the content. Students are then to evaluate an external example of poor writing, proofread and edit it.</p> <p>Discuss the need for access and equity principles/guidelines in the workplace then develop a sample set of guidelines.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b> 1.2 Use verbal and non-verbal communication to</p>	<p><b>Communication methods</b></p> <p>General features, benefits and working knowledge of a range of communication methods and equipment.</p>	<p>Identify and list the communication media/equipment used in the ICT industry.</p>

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<p>respond to the client requests and enquiries effectively</p>	<p>Factors affecting selection of particular communication methods/equipment:</p> <ul style="list-style-type: none"> <li>• technical and operational features</li> <li>• access of the sender and receiver to necessary equipment</li> <li>• technical skills required to use the medium</li> <li>• required format</li> <li>• degree of formality required</li> <li>• urgency and time frames.</li> </ul>	<p>Class discussion looking at communication needs:</p> <ul style="list-style-type: none"> <li>• delivery formats</li> <li>• time constraints</li> <li>• staff ability</li> <li>• training needs.</li> </ul> <p>Students select and correctly use a range of communication media in a variety of potential situations.</p>
<p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b></p> <p>1.1 Check for new problems logged by client</p> <p>1.4 Notify client of the results of investigation and provide advice and support on findings</p> <p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>2 Process information</b></p> <p>2.1 Answer enquiries promptly and appropriately</p>	<p><b>Customer Service</b></p> <p>An understanding of:</p> <ul style="list-style-type: none"> <li>• the relationship between client service and business success</li> <li>• the concept ‘client-focused’ company/organisation.</li> </ul> <p>Benefits of good customer service:</p> <ul style="list-style-type: none"> <li>• promoting goodwill</li> <li>• client loyalty/repeat business</li> <li>• new business</li> <li>• productivity</li> <li>• credibility</li> <li>• promoting company/organisation service ethic.</li> </ul> <p>Establishing good customer service:</p> <ul style="list-style-type: none"> <li>• knowledge of company/organisation product/service policies</li> <li>• use language that is targeted to the specific customer</li> <li>• present a friendly and courteous manner</li> <li>• use positive gestures and body language</li> <li>• ensure prompt response to enquiry/request</li> <li>• adopt a solutions-oriented approach</li> <li>• follow-up to maximise customer satisfaction.</li> </ul>	<p>Discuss the different types of relationships between clients and businesses.</p> <p>Outline the key features of a client-focussed organisation.</p> <p>Class debate – ‘IT businesses do not need to have a good relationship with their client to provide good service’.</p> <p>Discuss why customer service is important to the ICT industry and the benefits to the customer, employer and employee when quality service is provided.</p> <p>Discuss the consequences of poor customer service.</p> <p>Role-play a range of scenarios.</p>

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<p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b>                      1.1 Check for new problems logged by client                      1.2 Check previous logs for similar problems or requests from client                      1.3 Investigate and document the support issues affecting the client</p> <p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>                      1.3 Use appropriate questioning and active listening techniques to understand client needs and determine support requirements</p>	<p><b>Customer Needs</b></p> <p>An awareness of the difference between preferences, needs and expectations.</p> <p>An understanding of the differing needs of internal and external clients.</p> <p>An understanding of:</p> <ul style="list-style-type: none"> <li>• the purpose of background knowledge of client requirements</li> </ul> <p>Acknowledgement that in order to design a solution to a client’s problem you have to understand their need.</p> <p>Establishing customer 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 non-verbal signs.</li> </ul>	<p>Define preferences, needs and expectations.</p> <p>Discuss the different needs of internal and external clients and explore why their needs are different.</p> <p>Discuss the potential consequences of not meeting internal and external client needs.</p> <p>Identify why it is necessary to identify client needs.</p> <p>Access and review the following websites and identify key factors for success and failure for a business in terms of its client service:</p> <ul style="list-style-type: none"> <li>• ‘Behaviours that foretell project trouble’  <a href="http://www.striderandcline.com/behaviors.shtml">http://www.striderandcline.com/behaviors.shtml</a></li> <li>• ‘Avoid failed projects – prevention is better than cure’  <a href="http://www.projectsart.co.uk/pdf/avoid_failed_projects.pdf">http://www.projectsart.co.uk/pdf/avoid_failed_projects.pdf</a></li> <li>• ‘Turning around a failing project’  <a href="http://www.prairienet.org/cil_stc/downloads/TurningAroundFailingProject-PresentationNotes.pdf">http://www.prairienet.org/cil_stc/downloads/TurningAroundFailingProject-PresentationNotes.pdf</a></li> </ul> <p>Discuss how a lack of understanding of client needs can contribute to the failure of projects.</p> <p>Discuss ways to determine customer needs.</p> <p>Using case studies categorise user requirements into preferences, needs and expectations.</p> <p>Role-play – use different questioning techniques to try and determine customer needs, preferences and expectations.</p>

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	<p>Client needs analysis/assessment to enable:</p> <ul style="list-style-type: none"> <li>• a clear understanding of the client request/problem</li> <li>• an evaluation of client requirements</li> <li>• the prioritisation of requirements as essential or optional.</li> </ul>	<p>Discuss collaborative approaches to setting and managing expectations.</p> <p>Create a matrix to summarise a client needs analysis.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b> 1.2 Use verbal and non-verbal communication to respond to the client requests and enquiries effectively</p> <p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b> 1.3 Investigate and document the support issues affecting the client</p>	<p><b>Workplace documentation</b></p> <p>A range of workplace documentation:</p> <ul style="list-style-type: none"> <li>• memorandum</li> <li>• email</li> <li>• letter</li> <li>• facsimile</li> <li>• report.</li> </ul> <p>Company/organisation/industry standards for workplace documentation:</p> <ul style="list-style-type: none"> <li>• format</li> <li>• style</li> <li>• language                             <ul style="list-style-type: none"> <li>- clear</li> <li>- concise</li> <li>- directive</li> <li>- purposeful</li> <li>- correct</li> <li>- culturally sensitive</li> <li>- jargon-free</li> </ul> </li> <li>• details required.</li> </ul> <p>Current business practice in relation to preparation of workplace documentation:</p> <ul style="list-style-type: none"> <li>• formatting</li> <li>• style guides</li> <li>• templates</li> <li>• wizards</li> </ul>	<p>Discuss the benefits and limitations of a range of workplace documentation.</p> <p>Create examples of each type of workplace documentation using a case study approach.</p> <p>Review good and bad examples of workplace documentation and compare the characteristics of each.</p> <p>Internet search – access a range of style guides and review their contents and how prescriptive they are.</p> <p>Discuss the different ways of preparing workplace documentation (eg large organisation versus a small organisation).</p>

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	<ul style="list-style-type: none"> <li>• document naming and filing conventions</li> <li>• header/footer, page/section break, margins and page numbering</li> <li>• editing and proofing.</li> </ul>	<p>Class activity – develop class organisational standards for documents, including headers/footers, page/section breaks, margins, page numbering, font name and sizing, as well as other style considerations.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>2 Process information</b></p> <p>2.2 Record information or messages and refer client requests to the appropriate person in accordance with organisational procedures</p> <p>2.4 Investigate the organisational follow-up procedure or policy and record follow-up action taken in regard to the client request or enquiry</p> <p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b></p> <p>1.2 Check previous logs for similar problems or requests from client</p>	<p><b>Recording and reporting liaison with customers</b> <b>Recording and documenting</b></p> <p>Company/organisation/industry practices for recording and reporting:</p> <ul style="list-style-type: none"> <li>• formal/informal</li> <li>• verbal/written.</li> </ul> <p>Taking messages and sending them to the relevant person:</p> <ul style="list-style-type: none"> <li>• information to be obtained</li> <li>• repeating main points to ensure accuracy</li> <li>• system to record message (paper or electronic).</li> </ul> <p>Company/organisation/industry practices for:</p> <ul style="list-style-type: none"> <li>• tracking process</li> <li>• audit trails</li> <li>• naming standards</li> <li>• version control.</li> </ul> <p>Understanding lines of reporting and communication with supervisor/team leader and colleagues within the workplace.</p>	<p>Discuss a range of procedures for recording and reporting communication.</p> <p>Discuss appropriate methods for storing written communication.</p> <p>Brainstorm the key elements of taking a message.</p> <p>Role-play a range of partially scripted business phone calls and compare the message taken with a model answer.</p> <p>Class discussion and handout.</p> <p>Link to Task 1.</p> <p>Using the school structure and other student work experiences, construct organisational charts and then map formal lines of reporting and informal lines of communication.</p>
<p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b></p> <p>1.3 Investigate and document the support issues affecting the client</p> <p>1.4 Notify client of the results of investigation</p>	<p><b>Service/support</b></p> <p>Company/organisation’s:</p> <ul style="list-style-type: none"> <li>• contracts and service agreements with vendors</li> <li>• available support                             <ul style="list-style-type: none"> <li>- in-house</li> </ul> </li> </ul>	<p>Using the school hardware and software agreements, or other available resources, review different types of agreements and levels of support found in the workplace.</p>

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<p>and provide advice and support on findings</p> <p><b>2 Provide advice on software, hardware or network</b></p> <p>2.4 Obtain approval from the client to implement the solution</p> <p>2.5 Investigate and document the amount of technical support the client may require</p> <p>2.8 Provide technical support as part of group or one-to-one instruction to the client</p>	<ul style="list-style-type: none"> <li>- vendor</li> <li>- third party.</li> </ul> <p>Company/organisation approval policies and procedures:</p> <ul style="list-style-type: none"> <li>• services that can be provided on verbal approval from client</li> <li>• services that require written/signed approval                             <ul style="list-style-type: none"> <li>- workplace documentation to be completed</li> <li>- authorised person/s for signature.</li> </ul> </li> </ul> <p>The purpose for obtaining approval:</p> <ul style="list-style-type: none"> <li>• client verification of their requirements</li> <li>• to ensure                             <ul style="list-style-type: none"> <li>- solution is within company/organisation policy</li> <li>- costing of the solution is understood and allocated</li> <li>- timeframes for implementation of solution are acceptable.</li> </ul> </li> </ul> <p>A range of client support issues.</p> <p>Methods to investigate support issues:</p> <ul style="list-style-type: none"> <li>• interview the client using open, closed and reflective questions combined with active listening</li> <li>• on-site observation/examination</li> <li>• questionnaire</li> <li>• focus group</li> <li>• contacting vendor/maintenance organisation</li> <li>• existing documentation.</li> </ul> <p>Skills to investigate support issues:</p> <ul style="list-style-type: none"> <li>• research</li> <li>• problem-solving</li> <li>• report writing.</li> </ul> <p>Constraints that apply to provision of advice/support:</p> <ul style="list-style-type: none"> <li>• cost</li> <li>• time available</li> <li>• business policies and practices</li> </ul>	<p>Review sample agreements in order to summarise when it is most likely service can be provided on verbal approval and when formal signoff is needed.</p> <p>Link to Task 1.</p> <p>Discuss the repercussions of not obtaining approval.</p> <p>Link to Tasks 1 and 2.</p> <p>Discuss the qualities of a range of approaches.</p> <p>Link to Tasks 1 and 2.</p> <p>Brainstorm constraints.</p>

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	<ul style="list-style-type: none"> <li>• staff skills and training requirements</li> <li>• room or building geometry.</li> </ul> <p>Factors influencing the amount of technical support required:</p> <ul style="list-style-type: none"> <li>• skill level of client</li> <li>• complexity of solution being implemented.</li> </ul> <p>A range of possible advice and support:</p> <ul style="list-style-type: none"> <li>• provision of user documentation/manuals to assist client</li> <li>• one-to-one instruction/training</li> <li>• referral of training need to client’s supervisor/team leader</li> <li>• documentation from vendor</li> <li>• advice on hardware and software supported by the company/organisation.</li> </ul> <p>Benefits and limitations of providing support as:</p> <ul style="list-style-type: none"> <li>• one-on-one instruction</li> <li>• team/group training.</li> </ul>	<p>Discuss the differences between support requirements for:</p> <ul style="list-style-type: none"> <li>• an inexperienced and experienced client</li> <li>• a simple solution versus a complex one.</li> </ul> <p>Students given a range of different support requests. Students produce a report outlining the advice they would provide and how they would provide support.</p> <p>Investigate the costs of one-on-one instruction versus group training for the same course. Discuss the pros and cons of each approach.</p>
<p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>1 Establish contact with clients</b>            1.1 Receive requests and enquiries from clients in a polite and appropriate manner</p> <p><b>2 Process information</b>            2.1 Answer enquiries promptly and appropriately            2.2 Record information or messages and refer client requests to the appropriate person in accordance with organisational procedures            2.3 Inform client of the progress of their request or enquiry and advise them of the organisational process for answering their request or enquiry</p>	<p><b>Requests/enquiries</b></p> <p>Receiving requests and enquiries 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>• facsimiles</li> <li>• handwritten notes/letters.</li> </ul> <p>Skills required:</p> <ul style="list-style-type: none"> <li>• problem-solving               <ul style="list-style-type: none"> <li>- listen and acknowledge</li> <li>- identify problem</li> <li>- consider solutions</li> <li>- action</li> </ul> </li> </ul>	<p>Brainstorm the range of ways requests and enquiries may be received.</p> <p>Investigate the basic principles of problem-solving, decision-making, negotiating and prioritising.</p> <p>In groups student create a poster summarising the key elements of one of the listed skills for display in the classroom.</p>

Unit / Element of competency / Performance criteria	Content	Possible learning experiences / activities
	<ul style="list-style-type: none"> <li>- record</li> <li>- follow-up</li> <li>• decision-making</li> <li>• negotiating</li> <li>• prioritising.</li> </ul> <p>An understanding of:</p> <ul style="list-style-type: none"> <li>• the need for a continuous log/record of requests/problems.</li> </ul> <p>Standard operating procedures (SOP) for processing internal and external requests/enquiries:</p> <ul style="list-style-type: none"> <li>• recording initial request/enquiry</li> <li>• disseminating request/enquiry to appropriate person</li> <li>• respond to request/enquiry</li> <li>• inform client</li> <li>• record action</li> <li>• structured follow-up.</li> </ul> <p>Paper-based and electronic means for:</p> <ul style="list-style-type: none"> <li>• clients to record/log their requests/enquiries/problems</li> <li>• information and communications technology (ICT) staff to record client requests/enquiries/problems.</li> </ul> <p>Details to be documented by ICT staff:</p> <ul style="list-style-type: none"> <li>• client contact details</li> <li>• a description of the problem</li> <li>• progress of each task</li> <li>• actions taken (both successful and unsuccessful) to                             <ul style="list-style-type: none"> <li>- answer enquiry</li> <li>- fulfil request</li> <li>- solve the problem</li> </ul> </li> <li>• up-to-date list of outstanding or urgent tasks.</li> </ul> <p>Awareness of the scope of responsibility of personnel to enable referral of request/enquiry to the most appropriate person.</p>	<p>Discuss the benefits of maintaining a record of problems.</p> <p>Review the features of different helpdesk software for logging/recording requests.</p> <p>Create an SOP for the school’s helpdesk.</p> <p>Discuss the advantages and disadvantages of each.</p> <p>Brainstorm a list of the details that should be documented by ICT staff.</p> <p>Create a template for ICT staff to record client requests/enquiries/problems.</p> <p>Review the role descriptions of a range of IT positions. Identify the scope of responsibility for each</p>

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	<p>Appropriate persons:</p> <ul style="list-style-type: none"> <li>• colleague</li> <li>• supervisor/team leader</li> <li>• technical expert</li> <li>• trainer</li> <li>• vendor representative</li> <li>• supplier</li> <li>• industry/regulatory body.</li> </ul> <p>The importance of acting within the 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> <p>Effective responses to a range of potential enquiries and requests.</p> <p>An awareness of company/organisation standard turnaround times.</p>	<p>Class discussion about the authority and delegation and the implications of acting outside the appropriate level of authority.</p> <p>Role-play responses using questions previously collected.</p> <p>Discuss reasonable turnaround times.</p>
<p><i>ICAS3031A Provide advice to clients</i></p> <p><b>1 Analyse client support issues</b></p> <p>1.3 Investigate and document the support issues affecting the client</p> <p>1.4 Notify client of the results of investigation and provide advice and support on findings</p> <p>1.5 Obtain client feedback and make changes</p> <p><b>2 Provide advice on software, hardware or network</b></p> <p>2.1 Confirm software, hardware or network requirements with client</p> <p>2.2 Investigate and document a solution</p> <p>2.3 Document additional requirements discovered in the investigation and refer them to the client</p>	<p><b>Solutions</b></p> <p>A knowledge of the following supported by the client’s company/organisation:</p> <ul style="list-style-type: none"> <li>• basic features and functions of the operating system</li> <li>• features of the different types of hardware</li> <li>• advanced features and functions of the software</li> <li>• contract and service agreements with vendors</li> <li>• security and network guidelines and procedures.</li> </ul> <p>Interaction with the client to:</p> <ul style="list-style-type: none"> <li>• provide an overview of task, finding(s) and recommendation(s)</li> <li>• enable discussion of feasible alternative(s)</li> <li>• decide on best solution to enhance client efficiency</li> <li>• arrange implementation of course of action.</li> </ul>	<p>Discuss how having a breadth of knowledge can improve the quality of service to clients.</p> <p>Link to Task 1.</p> <p>Role-play interaction with a client using a selection of relevant helpdesk situations. Peer-evaluate the use of verbal and non-verbal communication skills used to convey technical information to the client.</p>

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<p>2.6 Discuss and agree the level of technical support identified with the client</p> <p>2.7 Arrange a time with the client when support will take place</p> <p>2.9 Provide manuals and help documentation to the client</p> <p><i>ICAW2002A Communicate in the workplace</i></p> <p><b>2 Process information</b></p> <p>2.4 Investigate the organisational follow-up procedure or policy and record follow-up action taken in regard to the client request or enquiry</p>	<p>Verbal and non-verbal communication skills to convey comprehensive technical information to client in a clear, coherent, concise and jargon-free manner.</p> <p>An awareness of the importance of ICT staff and the client agreeing on what is to be done in regard to the request/problem.</p> <p>Sources of information and possible solutions:</p> <ul style="list-style-type: none"> <li>• colleagues</li> <li>• company/organisation policies and manuals</li> <li>• consultants</li> <li>• suppliers</li> <li>• personal/professional contacts</li> <li>• ICT industry publications</li> <li>• trade shows</li> <li>• the internet</li> <li>• technical manuals</li> <li>• help documentation.</li> </ul> <p>Benefits and limitations of a range of solutions:</p> <ul style="list-style-type: none"> <li>• hardware <ul style="list-style-type: none"> <li>- upgrades</li> <li>- new</li> </ul> </li> <li>• software <ul style="list-style-type: none"> <li>- upgrades</li> <li>- new</li> </ul> </li> <li>• user training</li> <li>• implementing a new system.</li> </ul> <p>A knowledge of the process for developing macros and templates:</p> <ul style="list-style-type: none"> <li>• analyse client requirements</li> <li>• design solutions</li> <li>• discuss solutions with the client and choose a solution</li> <li>• create and test solution</li> <li>• demonstrate solution to client</li> </ul>	<p>Link to Task 1.</p> <p>Discuss the implications for the client and the IT organisation if an action/solution hasn't been agreed to.</p> <p>Link to Tasks 1 and 2.</p> <p>Prepare a proposal to improve the IT facilities at the school or for a local business:</p> <ul style="list-style-type: none"> <li>• for both hardware and software, summarise the benefits and limitations of upgrading the existing or buying new</li> <li>• include discussion on the implications for training users.</li> </ul> <p>Select one of the following problems and develop and implement a macro and template:</p> <ul style="list-style-type: none"> <li>• printing specific cells in a spreadsheet that aren't contiguous</li> <li>• reformatting text in a specific manner</li> <li>• backup and restore procedures for a spreadsheet</li> <li>• standard formatting of pictures in a word processing</li> </ul>

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	<ul style="list-style-type: none"> <li>• refine the solution</li> <li>• document the solution.</li> </ul> <p>Writing a range of macros and templates.</p> <p>Application of known solutions to a range of predictable problems.</p> <p>An awareness of the importance of:</p> <ul style="list-style-type: none"> <li>• implementing solutions within acceptable timeframes</li> <li>• minimising impact on client’s daily responsibilities.</li> </ul> <p>An awareness of the benefits of following up with clients post-resolution.</p>	<p>document.</p> <p>Link to Task 1 and 2.</p> <p>Class discussion.</p> <p>Class discussion on the benefits of client follow-up for both satisfied and dissatisfied clients.</p>
<p><i>ICAS3031A Provide advice to clients</i></p> <p><b>3 Obtain client feedback</b></p> <p>3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about the solution and support provided</p> <p>3.2 Provide client with instructions on how to complete the form or use other means of providing feedback</p> <p>3.3 Distribute the evaluation or feedback to the client</p> <p>3.4 Review the feedback from the client to identify areas for improvement</p>	<p><b>Feedback</b></p> <p>Types of feedback:</p> <ul style="list-style-type: none"> <li>• positive</li> <li>• negative</li> <li>• constructive.</li> </ul> <p>Recognition of the value of client feedback to the company/organisation:</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 company/organisation.</li> </ul> <p>Methods to obtain client feedback:</p> <ul style="list-style-type: none"> <li>• questionnaire <ul style="list-style-type: none"> <li>- paper</li> <li>- electronic</li> </ul> </li> <li>• interview</li> <li>• focus group.</li> </ul>	<p>Identify the different types of feedback and discuss the value of each.</p> <p>Brainstorm the benefits of receiving feedback for the company and for the client.</p> <p>Discuss ways to elicit constructive feedback.</p> <p>Investigate each of the methods listed for obtaining client feedback and evaluate them in terms of:</p> <ul style="list-style-type: none"> <li>• validity</li> <li>• cost</li> <li>• effectiveness.</li> </ul>

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	<p>Points to consider when designing feedback mechanism:</p> <ul style="list-style-type: none"> <li>• use of language                             <ul style="list-style-type: none"> <li>- targeted to client</li> <li>- plain English</li> <li>- minimising technical/industry jargon</li> </ul> </li> <li>• questioning technique                             <ul style="list-style-type: none"> <li>- open, closed and/or reflective</li> <li>- avoiding bias/leading questions</li> </ul> </li> <li>• opportunity for ‘free-response’.</li> </ul> <p>How to interpret feedback in order to improve work practices.</p> <p>Reporting feedback to appropriate person(s):</p> <ul style="list-style-type: none"> <li>• supervisor/team leader</li> <li>• management</li> <li>• vendor</li> <li>• supplier</li> <li>• trainer</li> <li>• colleagues.</li> </ul>	<p>In groups review samples of both good and bad examples of client feedback mechanisms noting the features of each.</p> <p>Link to Task 1.</p> <p>In small groups analyse sample feedback for a range of situations and identify how the feedback can improve immediate and future work outcomes.</p> <p>Link to Task 1.</p> <p>Identify a range of methods for reporting feedback based on the feedback mechanism used.</p>