

Training Package	Retail Services (SIR07)		HSC Requirements and Advice
Unit title	Interact with customers		
Unit code	Competency field	Sector	HSC Indicative Hours 20
SIRXCCS002A	Client and Customer Service	Cross-Sector	

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to deliver service to customers. It entails being able to communicate effectively with customers, respond to their complaints, receive and process sales orders and identify special customer requirements.
Prerequisite units	Nil
Application of the unit	This unit applies to frontline service personnel. It requires the team member to demonstrate consistent application of store policies and industry codes of practice to provide a quality service environment by treating customers and team members in a courteous and professional manner through all stages of the service and sales procedure, and to accurately identify and resolve customer complaints.
Employability Skills	The required outcomes described in this unit contain applicable facets of Employability Skills. The <i>Employability Skills Summary</i> of the qualification in which this unit is packaged will assist in identifying Employability Skill requirements.

Evidence Guide

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

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Methods of assessment	Assessing Employability Skills
<p>Evidence of the following is <u>essential</u>:</p> <ul style="list-style-type: none"> consistently applies store policy and procedures and industry codes of practice in regard to customer service provides a quality service environment by treating customers and team members in a courteous and professional manner through all stages of the service and sales procedure accurately identifies the nature of customer complaints, resolves complaints and provides service to customers according to store policies uses effective questioning, active listening 	<p>Assessment <u>must</u> ensure access to:</p> <ul style="list-style-type: none"> a real or simulated work environment relevant documentation, such as: <ul style="list-style-type: none"> sales order forms complaint and return forms stock, inventory and price lists store policy and procedures manuals a range of customers with different requirements point-of-sale equipment and materials a communication system or a range of communication equipment. 	<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"> observation of performance in the workplace a role play third-party reports from a supervisor customer feedback answers to questions about specific skills and knowledge review of portfolios of evidence and third-party workplace reports of on-the-job performance. 	<p>Employability Skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.</p> <p>Employability Skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.</p>

Critical aspects for assessment and evidence required to demonstrate competency in this unit cont/d		Methods of assessment cont/d	
<p>and observation skills to identify special customer requirements</p> <ul style="list-style-type: none"> • accesses, records and processes sales orders accurately and responsibly according to store policy and procedures • collaboratively works within a team to meet customers' needs. 		<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"> • SIRXCCS001A Apply point of sale handling procedures • SIRXRSK001A Minimise theft • SIRXINV001A Perform stock control procedures • SIRXFIN001A Balance point-of-sale terminal. 	

Required Skills and Knowledge		HSC Requirements and Advice
This section describes the essential skills and knowledge and their level, required for this unit.		
<p>The following skills <u>must</u> be assessed as part of this unit:</p> <ul style="list-style-type: none"> • greeting and farewelling techniques • add-on selling concepts • literacy skills in the following areas: <ul style="list-style-type: none"> - written procedures for orders, in person, by telephone or in electronic format - message taking in person or by telephone - written record of complaints - sales, stock and delivery documentation • numeracy skills in regard to: <ul style="list-style-type: none"> - handling of tender - weighing and measuring of goods. 	<p>The following knowledge <u>must</u> be assessed as part of this unit:</p> <ul style="list-style-type: none"> • store policy and procedures in regard to: <ul style="list-style-type: none"> - customer service - dealing with customer complaints - allocated duties and responsibilities - customer returns and refunds - lay-by, gift voucher and rain-check procedures • merchandise and service range of store departments • location of store departments • functions and procedures for operating the store telephone system and other communication equipment and the relevant numbers • relevant legislation and statutory requirements • relevant industry codes of practice • relevant OHS requirements • questioning and active listening • conflict resolution • following set routines and procedures • handling difficult or abusive customers. 	<p>Key Terms and Concepts</p> <ul style="list-style-type: none"> • active listening • add-on selling • allocated duties and responsibilities • benefits of good customer service • communication • customer preferences, needs and expectations • customer satisfaction and dissatisfaction • customer special needs/requirements • establishing and maintaining contact with customers • establishing good work habits and customer service • farewell customers • follow-up action • handling customer complaints • handling difficult or abusive customers • internal and external customers • level of authority • lines of reporting • non-verbal signs • open, closed and reflective questions • personal attributes and work ethics • point of sale equipment • processing exchanges and returns • quality customer service • receive and process sales orders • receiving and recording requests, enquiries and complaints • sales documentation • sales orders • scope of responsibility • seeking assistance • telephone system and other communication equipment • workplace/company/store policy and procedures.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
1 Deliver service to customers	1.1 Conduct <i>communication</i> with <i>customers</i> in a professional, courteous manner according to <i>store policy</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. <i>Bold italicised</i> wording in the Performance Criteria is detailed below.</p> <p><i>Communication</i> techniques may include:</p> <ul style="list-style-type: none"> • using open and inclusive language • speaking clearly and concisely • using appropriate language • non-verbal communication • face-to-face or telephone contact with customers. <p><i>Customers</i> may include:</p> <ul style="list-style-type: none"> • new or repeat contacts • internal and external contacts • customers with routine or special requests • people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities. <p><i>Store policy</i> may relate to:</p> <ul style="list-style-type: none"> • customer service • dealing with customer complaints • processing sales orders • cash handling. 	<p>Learning experiences for the HSC must address:</p> <p>Importance of communication in a retail services environment.</p> <p>Types of communication:</p> <ul style="list-style-type: none"> • verbal • non-verbal • written. <p>Personal attributes and work ethics of retail services employees including:</p> <ul style="list-style-type: none"> • attendance and punctuality • ethical behaviour • honesty • work performance • taking directives • attention to detail • personal presentation and grooming • attitude • discretion • confidentiality • consistency of service • safe work practices. <p>Types of customers including:</p> <ul style="list-style-type: none"> • internal <ul style="list-style-type: none"> - workmates/colleagues/employees - departments • external. <p>A knowledge of:</p> <ul style="list-style-type: none"> • workplace/company/store policy and procedures in relation to establishing contact with customers • industry codes of practice in relation to quality customer service. <p>Methods of approaching a customer including:</p> <ul style="list-style-type: none"> • greeting • merchandise • service.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<p>Establishing good work habits through knowledge of the workplace/company/store:</p> <ul style="list-style-type: none"> • product/merchandise range and service(s) offered • location of other stores (if applicable) • client base • greeting, closing and farewelling procedures/ techniques • client interaction protocols • request/enquiry records and tracking • request/enquiry procedures • return or refund policy and procedures.
	<p>1.2 Meet <i>customer needs</i> and reasonable requests or refer to supervisor according to store policy and <i>legislative requirements</i>.</p>	<p><i>Customer needs</i> may include:</p> <ul style="list-style-type: none"> • information regarding store facilities and services • location of specific items within the store • product information • returns or refunds. <p><i>Legislative requirements</i> may include:</p> <ul style="list-style-type: none"> • Trade Practices Act • tobacco laws • lottery legislation • liquor licensing regulations • sale of X and R rated products • sale of second-hand goods • trading hours • transport, storage and handling of goods. 	<p>Learning experiences for the HSC must address:</p> <p>An awareness of the difference between preferences, needs and expectations.</p> <p>An understanding of the differing needs of internal and external customers.</p> <p>Establishing customer preferences, needs and expectations through:</p> <ul style="list-style-type: none"> • active listening • using open, closed and reflective questions • observation and recognition of non-verbal signs. <p>An awareness of customer needs including:</p> <ul style="list-style-type: none"> • information regarding store facilities and services • location of specific items within the store • product and service information • exchanges or returns. <p>Benefits of good customer service including:</p> <ul style="list-style-type: none"> • promoting goodwill • client loyalty/repeat business • new business • productivity • credibility • promoting workplace/company/store service ethic. <p>An awareness of factors customers expect in good service including:</p>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<ul style="list-style-type: none"> • individualised attention • price • quality • product knowledge • presentation • polite and courteous service • efficiency • consistency. <p>Establishing good customer service including:</p> <ul style="list-style-type: none"> • knowledge of workplace/company/store policies • use language that is targeted to the specific customer • present a friendly and courteous manner • use positive gestures and body language • ensure prompt response to enquiry/request • adopt a solutions-oriented approach • follow-up to maximise customer satisfaction. <p>Personal attributes that will assist employees to be responsive to customer needs including:</p> <ul style="list-style-type: none"> • sincerity • confidence • enthusiasm • efficiency • empathy • interest in other people. <p>Effective responses to a range of enquiries and requests.</p>
	1.3 Record customer details and information where necessary.		<p>Learning experiences for the HSC must address:</p> <p>Receiving requests, enquiries and complaints through:</p> <ul style="list-style-type: none"> • telephone • workplace forms (paper and electronic) • electronic mail • face-to-face • memoranda • facsimile • hand written notes/letters.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<p>An awareness of paper-based and electronic means for recording customer details and their requests/enquiries/complaints.</p> <p>The importance of recording information that is:</p> <ul style="list-style-type: none"> • clear • legible • accurate • concise • appropriate in terms of industry terminology and abbreviations.
	1.4 Identify and anticipate possible problems and take action to minimise the effect on customer satisfaction.		
	1.5 Recognise and act upon opportunities to deliver additional levels of <i>service</i> beyond the customer's immediate request.	<p><i>Service</i> may include:</p> <ul style="list-style-type: none"> • all store activities • internal and external customers • follow up in event of delays in service provision. 	<p>Learning experiences for the HSC must address:</p> <p>An understanding of:</p> <ul style="list-style-type: none"> • the relationship between customer service and business success • the concept of 'client-focused' workplace/company/store.
	1.6 Maintain contact with customer until sale is completed according to store policy.		
	1.7 Farewell customer appropriately and courteously according to store policy.		
	1.8 Use verbal and non-verbal communication to develop rapport with customers during service delivery.		<p>Learning experiences for the HSC must address:</p> <p>The importance of the following to verbal communication:</p> <ul style="list-style-type: none"> • appropriate language • clear voice • audible volume • courteous tone • active listening • asking questions or rephrasing to clarify or confirm understanding.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
	<p>1.9 Encourage repeat customers by promotion of appropriate services or products according to store policy.</p> <p>1.10 Process customer returns or refunds according to store policy and procedures.</p>		<p>The importance of communicating in a language that is:</p> <ul style="list-style-type: none"> • clear • concise • directive • purposeful • correct • courteous • culturally sensitive. <p>Effective communication techniques in relation to non-verbal communication including:</p> <ul style="list-style-type: none"> • understanding body language • interpreting <ul style="list-style-type: none"> - subtext - gestures • standards of dress • use of personal space. <p>Learning experiences for the HSC must address:</p> <p>A knowledge of add-on selling concepts.</p> <p>Learning experiences for the HSC must address:</p> <p>Workplace/company/store policy and procedures for customer exchanges and returns.</p>
2 Respond to customer complaints	2.1 Convey a positive, helpful attitude to customers when handling <i>complaints</i> according to store policy.	<p><i>Complaints</i> may relate to:</p> <ul style="list-style-type: none"> • service • products • prices. 	<p>Learning experiences for the HSC must address:</p> <p>Main types of customer complaints:</p> <ul style="list-style-type: none"> • prices • overcharging • value for money • poor or inconsistent service • product. <p>Skills required including:</p> <ul style="list-style-type: none"> • problem-solving <ul style="list-style-type: none"> - listen and acknowledge - identify problem - consider solutions

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<ul style="list-style-type: none"> - action - record - follow-up • decision-making • negotiating • prioritising. <p>An awareness of workplace/company/store complaints handling policy and procedures.</p>
	2.2 Handle complaints sensitively, courteously and with discretion.		
	2.3 Establish and confirm with customer nature of complaint by active listening and questioning.		
	2.4 Take action to resolve complaint to customers' satisfaction wherever possible.		<p>Learning experiences for the HSC must address:</p> <p>An awareness of the importance of:</p> <ul style="list-style-type: none"> • retail services staff and the customer agreeing on what is to be done in regard to the complaint • implementing solutions within acceptable time frames. <p>Techniques for handling difficult or abusive customers.</p> <p>How and when to seek assistance for issues that cannot be resolved effectively.</p>
	2.5 Promptly refer unresolved customer dissatisfaction or complaints to supervisor.		<p>Learning experiences for the HSC must address:</p> <p>The importance of acting within level of authority in terms of:</p> <ul style="list-style-type: none"> • taking initiative • problem-solving • decision-making. <p>Understanding lines of reporting and communication with supervisor/team leader and others in the workplace.</p>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			Awareness of the scope of responsibility of personnel to enable referral of dissatisfaction/complaint to the most appropriate person.
	2.6 Take the opportunity to turn incidents of customer dissatisfaction into a demonstration of high-quality service to customers according to store policy.		
	2.7 Complete documentation regarding customer dissatisfaction or complaints accurately and legibly.		<p>Learning experiences for the HSC must address:</p> <p>A knowledge of workplace/company/store practices for recording and reporting:</p> <ul style="list-style-type: none"> • formal/informal • verbal/written. <p>An awareness of the importance of documenting complaints and incidents.</p>
	2.8 Take <i>follow-up action</i> as necessary to ensure customer satisfaction.	<p><i>Follow-up action</i> may require:</p> <ul style="list-style-type: none"> • verbal and non-verbal communication with: <ul style="list-style-type: none"> - customers - staff - supervisors and management - suppliers • recommendations to supervisor regarding policy and procedure development or alteration. 	<p>Learning experiences for the HSC must address:</p> <p>An awareness of the benefits of following-up with customers post-resolution.</p> <p>Recognition of the value of complaints/customer feedback to the workplace/company/store including:</p> <ul style="list-style-type: none"> • improving business relationships • identifying and overcoming existing problems • eliminating entrenched work practices • improving productivity • enhancing output quality • future development of the workplace/company/store and the employees.
3 Receive and process sales orders	3.1 Record customers' details and information accurately.		
	3.2 Promptly refer customers to appropriate area as required.		<p>Learning experiences for the HSC must address:</p> <p>Awareness of the following to enable customer referral:</p> <ul style="list-style-type: none"> • scope of responsibility and allocated duties/area of expertise of other staff

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<ul style="list-style-type: none"> product(s) and service(s) provided in other areas/ sections/departments of the workplace/company/ store.
	3.3 Provide customers with information in clear, concise manner.		
	3.4 Process, record and act upon <i>sales orders</i> according to store policy.	<p><i>Sales orders</i> may be:</p> <ul style="list-style-type: none"> verbal written electronic. 	<p>Learning experiences for the HSC must address:</p> <p>A range of methods for recording sales orders including:</p> <ul style="list-style-type: none"> verbal written electronic. <p>Typical sales documentation including:</p> <ul style="list-style-type: none"> invoices credit notes stock, inventory and price lists order forms financial transaction dockets/slips lay-by slips credit slips product return slips. <p>A knowledge of workplace/company/store policies and procedures to access, record and process sales orders.</p> <p>Understanding of the functions and operational features of point-of-sale equipment.</p> <p>Workplace/company/store policy and procedures for:</p> <ul style="list-style-type: none"> lay-by gift vouchers raincheck. <p>An awareness of the importance of following workplace/company/store set routines and procedures.</p> <p>A knowledge of the functions and procedures for operating workplace/company/store:</p>

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<ul style="list-style-type: none"> • telephone system • other communication equipment.
4 Identify customer special requirements	4.1 Promptly identify customers with special needs or requirements by observation and questioning.		<p>Learning experiences for the HSC must address:</p> <p>A range of customers with different needs, preferences and expectations.</p>
	4.2 Verbally and non-verbally convey a willingness to assist.		
	4.3 Promptly service, refer or redirect customers' needs as required.		