BSB51107 - Diploma of Management
BSBCUS501A – Manage quality customer service

ASSESSMENT COVER SHEET

PARTICIPANTS FULL NAME: .................................................................

Participant declaration:

I certify that this work is my own, that I have not duplicated the information from another source. I
also state that I have referenced appropriately all information that I have gathered from other
sources.

I confirm that I have kept a hard copy and a soft copy of this work.

Signature ..................................................................................

DATE OF WORK SUBMITTED: / /

ASSESSORS NAME: .................................................................

COMPETENT [ ] NOT YET COMPETENT [ ]

DATE: / /

ASSESSORS SIGNATURE:..........................................................

The MalkaGroup
Registered Training Organisation
Provider Number 21694
29 Ellingworth Parade
Box Hill, VIC 3128
Ph: (03) 9890 3350
Email: info@themalkagroup.com
Website: www.themalkagroup.com
Assessors Comments
(To be sent back to the participant – if requested)

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________
Assessment Instructions for the Student

Assessment by completing questions within this book:
This booklet contains assessment questions and tasks which will allow you to provide evidence toward gaining this qualification. If you have been able to demonstrate competence through recognition for any unit(s) then your Trainer will advise of which questions for that particular unit(s) that you will not need to complete.

Assessment Strategy
Assessment Tasks to establish competency in this unit may include: self assessment exercises; workplace scenarios; workplace tasks; short answer questions (explanation); short answer questions (analysis); short answer questions (description); case study; self performance analysis; self reflection/observation with checklists; reports; diary/journal; research projects; scenarios - problem solving; plans; and multiple choice.

Demonstrating Competency
To demonstrate competence you must complete all assessment tasks. Each task is linked to specific competency element/s or critical aspects of assessment.

Customising Assessments
Students may negotiate to customise assessment tasks to meet their individual needs in relation to workplace setting, interests, learning style, literacy or cultural background. The original integrity of the assessment must be maintained.

Assessment Task Length
Where space/lines have been provided for addressing an assessment task, the student should be guided as to the length of their answer by the space provided. If more space/lines are required, the student should attach a separate page containing their name and with the assessment task number clearly indicated. Where no space/lines have been provided, the student should complete the answer on a separate page and attach it to the assessment containing their name and with the assessment task number clearly indicated.

Assessment
When you have completed all assessment tasks, complete the information at the front of the booklet and submit it to your trainer. Your trainer will provide you with feedback and you will be assessed as Competent or Not Yet Competent in this unit. If you are assessed as Not Yet Competent you will have an opportunity to be reassessed.

Workplace Observation Assessment
As part of your assessment for this course, there may be a need for your Trainer to come and observe you demonstrating skills in the workplace that reflect elements and criteria of this course. If this is the case, your Trainer will advise you of this requirement and organise a time with you to conduct this observation.
BSBCUS501A – Manage quality customer service

There is not a minimum word count for your answers. All questions require a written response and please note that some questions have more than one part. Your assessment will be assessed as ‘NYC’ (Not Yet Competent) and returned to you if all questions have not been answered.

Assessment Format

- Activities are set out below with associated questions. Answer the questions in the space provided.
- Include appropriate references, quotes and bibliography
- Attach relevant and supporting information as appendices where necessary

Read Cole ‘Management: Theory and Practice,’ Chapter 19, Caring for Customers and answer the following questions:

Assessment Task 1
Business Analysis

1. Describe your business from the perspective of a customer

   The answer will vary according to the specific context, but may include:
   - Knowledgeable and friendly staff
   - Well presented
   - Promises of marketing and promotional information delivered
   - Meeting of a need
   - Exchange of resources – time, money, service, product

2. What do your internal and external customers want from your business?

   The answer will vary but may include:
   - Problems solved
   - Needs met
   - Expectations of service/product satisfied
   - Support
   - Advice
   - Quality
   - Value for money
   - Processes to achieve desired outcome

3. How do you know what the customer needs are?

   Answers may vary but may include:
   - Direct feedback
   - Surveys
   - Consultation
4. How are customer needs included in business planning processes?

Answers may vary but may include:
- Feedback is used for product/service analysis and modification
- Benchmarking
- Records are used for trend analysis and decision making
- Marketing plan incorporates customer perspective
- Customer perspective is used as a basis for development of key performance targets
- Quality, time and financial measures are based on customer feedback

5. How do you ensure customer cost, quality and time specifications are met?

Answers may vary but may include:
- Establishment of standards that incorporate these specifications
- Management processes are put into place that meet minimum requirements
- Effective provision and management of staff
- Appreciation of the value of time and cost from customers perspective
- Review of services against cost, quality and time
Assessment Task 2
Case Study

Your management team are about to enter into a business planning exercise. Your industry is highly competitive and price sensitive. On broad level the industry is experiencing restructure and challenge from several angles such as increasing technology demands, revenue pressures and decreasing demand. In the past five years many small operators have joined chain operations or closed up. Preferred supplier arrangements (with large corporate clients) have increasingly becoming the norm in the industry but these arrangements involve some long term risk to business independence and profitability.

Your management believe that you provide a professional service and costs are reasonable. Growth of the business is a strategic target. Management has determined that the whole business will need to increase its customer service as a key strategic advantage to assist the business to grow its market share and maintain financial sustainability.

You, as a supervisor of a work area with high levels of customer interaction, have been requested to attend the business planning sessions and contribute your ideas.

Questions

1. What might you need to consider before you participate in the business planning session?

Answers may vary but may include:
- Ensure thorough understanding of business processes, customers, market and resources
- Sustainability of business financially
- Training and skill levels of staff
- Efficiencies and gaps
- Point of difference
- SWOT
- Feedback from stakeholders
- Market position
- Customer complaints and records
- Continuous improvement
- Trends

2. Explain how you might develop plans and strategies to meet customer needs, including staff training

Answers may vary but may include:
- Know and define customer needs
- Ensure staff awareness of customer needs
- Review services/products against known customer requirements
- Brainstorm ideas from those involved
- Evaluations of service/products from staff – feedback
- Performance reviews
- Rewards program for effective behaviours
- Lead by example
- Develop culture of customer service
3. What can you do to ensure customer service is part of everyday operations?

Answers may vary but may include:
- Ensure staff receive orientation on customer service
- Include customer service in every job role – internal or external customers
- Lead by example
- Culture of customer service
- Develop relevant KPI’s
- Standardize expectations in service/product - uniformity
- Communications with staff and customers – include the message as relevant

4. What quality/customer service initiatives would you include in the business plan?

Answers may vary but may include:
- Performance targets that identify the quality and customer service expectations
- Market share targets
- Definition of customer base
- Business development activities using referrals
- Loyalty program
- Staff performance incentives as relevant

5. What implications do increased customer service standards have on how you will manage your team’s performance?

Answers may vary but may include:
- Education program regarding new increased standards and expectations
- Training staff in new skills
- Monitoring of staff regarding new increased customer service standards
- Advertise/promote new increased standards
- Self monitoring tools/ checklists for major functions involving customer service
- Reward and recognition for appropriate performances
- Include in revised position descriptions

6. Explain how approaches below can be used to support your team achieve excellence in customer service?

Leadership
- Set an example
- Outline expectations
- Support/recognize effective performances and repeats of such
- Include in targets – individuals, team etc
- Communication regarding concept
- Develop training
- Include in team meeting agenda

Supervision
- Ensure staff are aware of performance targets
- Monitor performance
- Reward performance as relevant
- Teach and coach effective performances
- Recognize staff with effective behaviors
• Discipline/follow up on poor behaviours
• Outline requirements clearly
• Educate where required

Coaching
• Training programs provision
• Set an example
• Set up buddy system
• Establish performance worthy of repeat and focus on these
• Revise ineffective performances and train to gaps
• Provide information, steps and checklist for employees

Mentoring
• Provide examples
• Use web-based knowledge/information
• Develop regular mentoring program
• Establish time and resources for programmed regular mentoring
• Teach senior staff mentoring skills

7. At what point would you consider a service team simply could not perform their role?

Answers may vary but may include:
• When customer is repeatedly not happy
• Work load is too much
• Standards for work/product/service are not met after support and training is provided
• Poor attitude and values of team
• Time, quality or financial targets are not met
Assessment Task 3

Group Task

Industry Report

Working as an individual or in small groups, prepare a report on a selected industry. 500 words minimum

Outline the following:

1. Tool and strategies that can be applied to monitor service targets and quality standards

Exploration of the following may apply:
- MTOs (moments of truth) - internal & external customers
- Review of all customer feedback (recorded and analyzed)
- Review of the performance against check sheets/procedures
- Establishment and monitoring of performance targets - for individuals or departments
- Human Resources –
  - tight parameters for staff recruitment – right skills for the job. Accurate job descriptions with performance measures
  - staff training programs for skills development
  - performance review programs
  - rewards programs
- Standards for:
  - Branding - Marketing and promotional materials
  - Facilities standards and presentation
  - Maintenance of property
- Record keeping for all of this information is the key. This is the only way we can make a true analysis of our service standards.
- Benchmarking customer service standards &. How else can we see if our standards are high enough?

2. Optimal approaches to gathering feedback from customers

Exploration of the following may apply:
- Customer surveys
- Customer behaviors records - analyze customer purchase history, customer retention & identify opportunity to improve service standards
- Complaints register
- Profiling our customers – service needs/spend/demographic/expectations
- Consultation with different target groups
- Discussion with staff
3. Commonly used resources employed to support quality service provision to clients

Exploration of the following may apply:

- Continuous improvement program to help develop and improve customer standards
- Rewards and recognition programs staff for high levels of internal & external customer service.
- Communications programs – staff meetings, memos,
- Benchmarking against competitors
- Customer complaints
- The use of flow charts can help staff understand how we will handle all complaints to a positive outcome.
Assessment Task 4

Case Study

Sally was working hard at her tasks to complete a transaction for a customer. When she completed this task she indicated with a hand wave to the next customer to come forward to the desk. The next customer was agitated. They had come into the office with a complaint regarding continued correspondence for a person who no longer resided at the same address. The customer complained that this was the third time they had raised the complaint and none of the staff listened. Further to this the customer complained about the length of time it “always took” to be served, that the communication style of the staff was disrespectful and that chairs should be provided in the waiting area.

1. As the manager, what would recommend?
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………

2. Who would you consult? Why?
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………

3. For each of the following listed customer service difficulties, describe (in brief dot points) how you would help staff overcome each one.

   Poor handling of customer complaints
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………

   Lack of product knowledge
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………

   Difficulty understanding customer inquiries
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
   …………………………………………………………………………………………………………………………………………
Difficulty aligning customers’ needs with products and services

4. Draft up a flow chart for a complaints resolution process relevant to your workplace

5. What five important questions can customer records answer?

6. A customer may require a product or service just outside your organization’s ability to deliver. Discuss the options you have in this situation. What are the ethical, moral and operational influences that may influence your decision?
Third Party Report - BSBCUS501A – Manage quality customer service

A supervisor is to initial each performance criteria as appropriate to the demonstrated skills and knowledge of the trainee.

Trainee Name: …………………………………………

Supervisor Name: …………………………………………

<table>
<thead>
<tr>
<th>Performance Criteria</th>
<th>Y/N</th>
<th>Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Investigates, identifies, assesses, and includes the needs of customers in planning processes?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Ensures plans achieve the quality, time and cost specifications agreed with customers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3Delivers products and/or services to customer specifications within organisations business plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1 Manages team performance to consistently meet the organisations quality and delivery standards?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2 Assists colleagues to overcome difficulty in meeting customer service standards using leadership, supervision, coaching and mentoring?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 Develops and uses strategies to monitor progress in achieving product and/or service targets and standards?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2 Develops and uses strategies to obtain customer feedback to improve the provision of products and/or services?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3 Develops, procures and uses resources effectively to provide quality products and/or services to customers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4 Makes decisions to overcome problems and to adapt customer services, products and/or service delivery in consultation with appropriate individuals and groups?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.5 Manages records, reports and recommendations within the organisation’s systems and processes?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Supervisor’s signature: ………………………………………………..

Trainee signature: …………………………………………………

Date: ………………………………………………………….