



Assessment Tasks

Assessor Guide

**BSBCUS401A Coordinate implementation of
customer service strategies**

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Assessment Documentation

This Assessor Guide is designed to provide standardised documentation and assessment procedure for the assessment processes conducted by this RTO.

The assessment tools that are used by you (the assessor) will result in evidence being generated by the student targeting this unit of competency. The evidence is kept by the RTO and is required for audit purposes.

The following table summarises the types of evidence students can generate as proof of competence. The table contains information based on the AQF (Australian Qualifications Framework) Level for the unit **BSBCUS401A Coordinate implementation of customer service strategies**. Sample assessment tools have been suggested as a means of assisting students in generating the appropriate form of evidence for this unit.

AQF Level	Distinguishing Features (Source: AQF Implementation Handbook 2007: Guidelines)	Type of evidence to be used	Sample assessment tools
Certificate IV	<ul style="list-style-type: none">▪ Demonstrate understanding of a broad knowledge base incorporating some theoretical concepts▪ Apply solutions to a defined range of unpredictable problems▪ Identify and apply skill and knowledge areas to a wide variety of contexts with depth in some areas▪ Identify, analyse and evaluate information from a variety of sources▪ Take responsibility for own outputs in relation to specified quality standards▪ Take limited responsibility for the quantity and quality of the output of others	<ul style="list-style-type: none">▪ Workplace achievement▪ Answers to case study▪ Work samples from a range of areas▪ Practical demonstration▪ Role playing a specific process▪ Log book▪ Photographs / videos▪ Third party report	<ul style="list-style-type: none">▪ Performance checklist for demonstrations / role plays▪ Case study scenarios and questions with benchmark answers▪ End product summary checklist▪ Written/oral questions and benchmark answers

The assessment activities associated with the unit of competency **BSBCUS401A Coordinate implementation of customer service strategies** are listed below:

Assessment 1: Written	<ul style="list-style-type: none">▪ Written answers to questions
Assessment 2: Project	<ul style="list-style-type: none">▪ Written responses to tasks
Assessment 3: Project	<ul style="list-style-type: none">▪ Written responses to tasks

Assessment Information

The candidate has been given the following information

This guide contains all of the assessment tasks required for completion of unit of competency **BSBCUS401A Coordinate implementation of customer service strategies**.

Prior to commencing the assessments your assessor will explain each task to you. You will be given the opportunity to ask questions and to seek clarification on any of the tasks, and your assessor will remain available to support you through the assessment process.

Your assessor is also available to discuss Recognition of Prior Learning and whether this applies to your circumstances.

Terms and conditions

Submitting your evidence portfolio

You are recommended to seek the advice of your assessor when putting together your evidence portfolio in order to confirm that you have provided sufficient evidence of competency.

You should note that your evidence portfolio must be retained by the Registered Training Organisation for audit purposes and will not be returned to you. If you wish to keep any evidence, you should make a copy prior to submission for assessment. You are advised to make sure you clearly label each answer and task and complete all sections of each assessment.

If possible, you should also submit copies of any workplace documents that may be relevant to this unit of competency. In this case you will need to gain approval to provide the copies from your employer.

Ownership and plagiarism

You are advised by accepting these terms and conditions you have declared the evidence that you submit is your own work or the result of your own research. By signing the declaration below you acknowledge your assessment is your own and contains no material written by another person except where due reference is made. Note that if you quote any source in your evidence, you must provide a reference to the source in order to ensure that you do not breach Copyright legislation. You need to be aware that a false declaration may lead to the withdrawal of a qualification.

Re-submission of your evidence portfolio

If your evidence meets the requirements of the unit of competency you will be assessed as Competent (**C**) in this unit. If your evidence does not meet the requirements of the unit of competency you will be assessed as Not Yet Competent (**NYC**). If you are assessed NYC, it is important to discuss your re-submission with your assessor as you will be given one opportunity only to revise and re-submit your evidence portfolio.

Candidate's declaration of original authorship

The candidate is required to sign the following declaration in the Candidate copy of this Assessment.

I declare that this assessment is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of a qualification

BSBCUS401A Coordinate implementation of customer service strategies

Elements

1. Advise on customer service needs

Performance Criteria (PC):

- 1.1 Clarify and accurately assess customer needs using appropriate communication techniques
- 1.2 Diagnose problems matching service delivery to customers and develop options for improved service within organisational requirements
- 1.3 Provide relevant and constructive advice to promote the improvement of customer service delivery
- 1.4 Use business technology and/or online services to structure and present information on customer service needs

2. Support implementation of customer service strategies

Performance Criteria (PC):

- 2.1 Ensure customer service strategies and opportunities are promoted to designated individuals and groups
- 2.2 Identify and allocate available budget resources to fulfil customer service objectives
- 2.3 Promptly action procedures to resolve customer difficulties and complaints within organisational requirements
- 2.4 Ensure that decisions to implement strategies are taken in consultation with designated individuals and groups

3. Evaluate and report on customer service

Performance Criteria (PC):

- 3.1 Review client satisfaction with service delivery using verifiable data in accordance with organisational requirements
- 3.2 Identify and report changes necessary to maintain service standards to designated individuals and groups
- 3.3 Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of client service strategies
- 3.4 Maintain systems, records and reporting procedures to compare changes in customer satisfaction

Required Skills

- RS 1. literacy skills to read a variety of texts, to prepare general information and papers, and to write formal and informal letters according to target audience
- RS 2. planning skills to develop implementation schedules
- RS 3. problem-solving skills to diagnose organisational problems relating to customer services

Required Knowledge

- RK 1. key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
- anti-discrimination legislation
 - ethical principles
 - codes of practice
 - privacy laws
 - environmental issues
 - occupational health and safety (OHS)
- RK 2. principles of customer service
- RK 3. organisational business structure, products and services
- RK 4. product and service standards and best practice models

Critical aspects of evidence

Evidence of the following is essential:

- CAE 1. identifying needs and priorities of the organisation in delivering services to customers
- CAE 2. responding to and reporting on customer feedback
- CAE 3. designing strategies to improve delivery of products and services
- CAE 4. knowledge of the principles of customer service

Employability Skills

Industry and enterprise requirements for the qualification:

- ES 1. Communication
 - conducting research to collect and analyse information in a range of reports
 - consulting with others to develop a range of plans and reports
 - liaising with stakeholders and promoting participative workplace arrangements
 - negotiating solutions to new and emerging issues
- ES 2. Teamwork
 - contributing to the development of other team members
 - providing feedback on team performance to colleagues and managers
- ES 3. Problem solving
 - applying risk management processes to business operations
 - assessing financial viability of new opportunities and matching organisational capability with market needs
- ES 4. Initiative and enterprise
 - encouraging creative and innovative workplace solutions
 - identifying new and emerging opportunities for the business and developing strategies to capitalise on them
 - managing, fostering and facilitating change
- ES 5. Planning and organising
 - developing systems that are flexible and responsive to changing circumstances
 - planning for contingencies and performance of staff and systems
- ES 6. Self management
 - dealing with contingencies
 - managing own time and priorities
 - taking responsibility as required by work role and ensuring all organisational policies and procedures are adhered to
- ES 7. Learning
 - assisting others to acquire new knowledge and skills to improve team and individual performance
- ES 8. Technology
 - using electronic communication devices and processes such as internet, intranet, email to produce written correspondence and reports
 - using technology to assist the management of information and to assist the planning process

Candidates targeting unit **BSBCUS401A Coordinate implementation of customer service strategies** need to complete all formative activities in preparation for the three summative assessment activities required for this unit.

The candidate is provided with instructions for each of the summative assessment activities in her/his assessment task book.

If at any stage of the assessments, you believe that the safety of anyone is in jeopardy, you should abort the assessment session.

Assessment 1: Written Test

The following instructions have been provided to the candidate.

Instructions to Candidate

You are required to answer the following questions to confirm your knowledge in relation to unit **BSBCUS401A Coordinate implementation of customer service strategies**.

You may refer to your training materials and other research while completing the answers.

Write your answers in the spaces below using a blue or black pen. Alternatively type a document and provide a printed copy. If you re-type the document, repeat each question in the document and type your answer under the question.

Instructions to Assessor: Written Benchmark Answers

The following answers are supplied for you (the assessor). Please ensure when marking the candidate's work that you adhere to the prescribed answers. The benchmark answers in the following table are intended as a guide to ensure consistency of assessment.

NOTE: Questions 1 to 8 are required knowledge for this unit and other units- BSBCUS402A Address customer needs and BSBMKG413A Promote products and services. They need to be completed only once by candidates.

Questions and benchmark answers	Mapping
Question 1. Each State and Territory is responsible for its own OHS Act, regulations and codes of practice. Which two of these three have legislated penalties for a breach?	
<i>Answer should indicate the following:</i> Act, regulations	RK1
Question 2. What is the purpose of codes of practice?	
<i>Answer should indicate the following:</i> Codes of Practice give practical advice and guidance on how to comply with the general obligations set out in the Act and Regulations.	RK 1
Question 3. What are the two main aims of OHS legislation?	
<i>Answer should indicate the following:</i> Ensure all areas of the workplace are safe and employees have the skills and equipment to perform their jobs safely.	RK1
Question 4. What is the purpose of the Queensland Anti-Discrimination Act 1991?	
<i>Answer should indicate the following:</i> To promote equality of opportunity for everyone by protecting them from unfair discrimination in certain areas of activity and from sexual harassment and certain associated objectionable conduct	RK1

Questions and benchmark answers	Mapping
<p>Question 5. Name six grounds that are prohibited by the Queensland Anti-Discrimination Act 1991.</p>	<p>RK1</p>
<p><i>Answer should identify 6 of the following points:</i></p> <p>The Act prohibits discrimination on the basis of the following attributes—</p> <ul style="list-style-type: none"> (a) Sex; (b) Relationship status; (c) Pregnancy; (d) Parental status; (e) Breastfeeding; (f) Age; (g) Race; (h) Impairment; (i) Religious belief or religious activity; (j) Political belief or activity; (k) Trade union activity; (l) Lawful sexual activity; (m) Gender identity; (n) Sexuality; (o) Family responsibilities; (p) Association with, or relation to, a person identified on the basis of any of the above attributes. 	
<p>Question 6. What is the annual turnover figure which separates businesses who must comply with the principles of the Commonwealth Privacy Act 1988 from those organisations that may be exempt?</p>	<p>RK1</p>
<p><i>Answer should indicate the following:</i></p> <p>The privacy provisions apply to businesses (including non-profit organisations) with an annual turnover of more than \$3 million and health service providers. Businesses with an annual turnover of \$3 million or less are exempt from the privacy laws unless the business falls under specifically identified areas.</p>	
<p>Question 7. Which information processing guidelines are outlined in the Queensland Information Privacy Act 2009?</p>	<p>RK1</p>
<p><i>Answer should indicate the following:</i></p> <p>How personal information can be collected, used, disclosed, altered, kept secure and managed.</p>	
<p>Question 8. Briefly explain why it is important that a manager understands ethical principles and behaves in an ethical manner.</p>	<p>RK1</p>
<p><i>Answer should indicate the following:</i></p> <p>A manager acts as a role model for the business by reinforcing the values, standards and ethics of the organisation. A manager also acts as a role model when it comes to communicating behavioural standards to subordinates and peers. By having regard for the other person's values, beliefs and expectations, a manager is able to demonstrate integrity, credibility, respect and empathy. Integrity in a leader is shown when they are honest, trustworthy and fair. By being honest and showing integrity a manager will build trust and credibility with subordinates and peers.</p>	

Questions and benchmark answers	Mapping
Question 9. List four principles of customer service.	
<p><i>Answer should identify 4 of the following points:</i></p> <p>Principles of customer service may include but are not limited to the following:</p> <ul style="list-style-type: none"> • Be helpful and courteous • Treat customers with respect and courtesy • Ensure customers have easy access to business products/services • Respond promptly to customers • Provide customers with clear and accurate information • Be consistent, reliable and fair • Seek customer views when considering a change to products or services • Clearly and truthfully explain all options available • Respect the legal, ethical and moral rights of customers • Identify and meet customer needs • Active listening • Honesty and ethics. 	RK2 CAE4
Question 10. It is important to understand the organisation's business structure in order to identify responsibility levels of certain roles (job positions) as well as the reporting lines within the business. What is the name of the diagram that illustrates these structures?	
<p><i>Answer should indicate the following:</i></p> <p>Organisational chart</p>	RK3
Question 11. To enable you to assist customers, you need detailed knowledge on the products and services available. Identify two ways to ensure staff have current knowledge on available products and services.	
<p><i>Answer should identify 2 of the following points:</i></p> <ul style="list-style-type: none"> • Provide regular meetings to update staff on products/services • Encourage and provide time for staff to read brochures from suppliers/distributors • Provide opportunities for staff to network with suppliers/distributors • Provide opportunities for staff to contribute and be involved in product/service promotions • Encourage staff to network and be involved with industry groups 	RK3
Question 12. It is important to understand and maintain product and service standards. Provide two points as to why it is important for a business to ensure high product/service standards.	
<p><i>Answer should identify 2 of the following points:</i></p> <ul style="list-style-type: none"> • Product/service standards define the level of service or product quality. Some products/services have a legal (legislated) standard that must be maintained. • The standard of products/services delivered to customers can enhance or reduce the reputation of a business. • The standard of products/services delivered to customers can impact on the market share of the business. • The customer base of a business is built on the standard of products/services provided to customers. 	RK4
Question 13. A business is continually seeking ways to improve its customer service. There are a number of best practice models which provide guidelines on customer service. Explain one technique a manager could use to identify the most appropriate model?	
<p><i>Answer should indicate the following:</i></p> <ul style="list-style-type: none"> • Research into customer service models used by similar businesses • Ask industry advisors (e.g. government business advisors) • Ask for feedback from customers, staff and other business managers • Identify industry benchmarks and KPIs of customer service models 	RK4

Total Questions	13
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Assessment checklist – Assessor Note

Please complete the assessment checklist in the Candidate Guide to record the assessment process and outcome.

The checklist contains a declaration by the candidate as follows:

- The purpose and outcomes of the assessment have been explained.
- I have received information about the unit of competency.
- I understand the type of evidence to be collected.
- The appeals system has been explained to me.
- I have notified my assessor of any special needs that may need to be considered during the assessment.

The checklist contains a section for the assessor to record the following:

- Whether RPL / Accelerated progression is required
- Whether Language / Literacy / Numeracy support is required
- Any other special needs

Assessment 2: Project

The following instructions have been provided to the candidate.

Instructions to Candidate

This activity is related to the unit of competency **BSBCUS401A Coordinate implementation of customer service strategies**. In particular, you will be required to demonstrate your skills and knowledge in relation to this unit of competency.

You may refer to your training materials and other research if required. The activity may be completed in the workplace or a simulated workplace.

Your assessor will use a checklist to record the assessment decision.

Overview

Below are a number of practical tasks to be completed over a period of time in a real or simulated workplace where you will perform the duties of a **manager**. The times for completion of the tasks are to be negotiated between yourself and the assessor. The tasks will reflect your ability to:

Project: Advise on customer service needs and implement strategies to improve customer service.

Your assessor will provide you with instructions and complete a checklist on which they will record your satisfactory performance of workplace tasks.

The Project Tasks table below identifies the documents that you are required to prepare and submit in your evidence portfolio. They may be presented in printed format in a folder or as an electronic copy.

Ensure both your name and student number is clearly displayed.

Instructions to Assessor

The following benchmarks are supplied for you (the assessor). Please ensure when marking the candidate's work that you adhere to the prescribed benchmarks which are intended as a guide to ensure consistency of assessment.

Project Tasks	Mapping
<p>The following tasks may be completed as a workplace project based on your own organisation and job role, or as a simulated workplace project based on a fictitious organisation, or an organisation you are familiar with.</p>	
<p>1. As a manager it is important that you review customer service and seek ways to make improvements. It is important to consider improving not only your own standard of customer service but also to assist others to make improvements in their standard of customer service.</p> <p>In order to identify ways to make improvements in customer service, you need to clarify and accurately assess the needs of customers. There are a number of ways this can be accomplished but they are all based on communication techniques. By ensuring there is good communication with customers, the number of customer complaints will reduce.</p> <p>Communication techniques may relate to:</p> <ul style="list-style-type: none"> Analysing customer satisfaction surveys Analysing quality assurance data Conducting interviews Consultation methods, techniques and protocols Making recommendations Obtaining management decisions Questioning Seeking feedback to confirm understanding Summarising and paraphrasing <p>Part A- Assess customer needs</p> <ul style="list-style-type: none"> Develop a questionnaire (minimum of 10 questions) which you could use to gather information from customers on their service needs and areas in customer service that may be improved. Customers should remain anonymous. <p>Customer needs may relate to:</p> <ul style="list-style-type: none"> Accuracy of information Advice or general information Complaints Fairness/politeness Further information Making an appointment Prices/value Purchasing organisation's products and services Returning organisation's products and services Specific information. 	<p>PC1.1-1.4, 2.1 RS1, 3 RK1-4 CAE1-4 ES1-4, 6-8</p>

Project Tasks	Mapping
<ul style="list-style-type: none"> Ask (at least ten) customers to complete the questionnaire. If you are in a simulated environment, you may use fellow students, family and friends to act as customers. <p>Customers may include:</p> <ul style="list-style-type: none"> Corporate customers Individual members of the organisation Individual members of the public Internal or external Other agencies. <ul style="list-style-type: none"> Analyse the feedback from the questionnaire and create a report explaining your findings (i.e. what are the customer's needs) and make a comment (recommendation) on areas in customer service where improvements could be made. <p>Part B- Identify ways to improve customer service</p> <p>Using the information from Part A, explain in a report the customer service issues and problems you diagnosed and the appropriate options you identified to improve customer service. You need to mention how these options meet with the organisation's requirements i.e. business aims, objectives, strategies and provide opportunities for continuous improvement.</p> <p>Organisational requirements may include:</p> <ul style="list-style-type: none"> Access and equity principles and practice Anti-discrimination and related policy Confidentiality and security requirements Defined resource parameters Ethical standards Goals, objectives, plans, systems and processes Legal and organisational policies, guidelines and requirements OHS policies, procedures and programs Payment and delivery options Pricing and discount policies Quality and continuous improvement processes and standards Quality assurance and/or procedures manuals Replacement and refund policy and procedures Who is responsible for products or services? <p>Strategic areas for improvement may include:</p> <ul style="list-style-type: none"> Courtesy/politeness Delivery times Merchandise characteristics Price offers Product/refund guarantees Product/service availability. <p>Part C- Provide advice on improving customer service</p> <ul style="list-style-type: none"> Step 1- Develop a PowerPoint presentation to present your findings from Parts A and B on service needs of customers and ways to make improvements. The number of slides should not be more than 12. The presentation will be shown to management, staff and other interested 	

Project Tasks	Mapping
<p>parties to promote strategies to improve customer service.</p> <ul style="list-style-type: none"> • Arrange with management, staff and other interested parties to attend the presentation on customers' service needs and strategies to improve customer service. If you are in a simulated workplace environment, you may ask your fellow students to represent the invited individuals and groups. <p>Individuals and groups may include:</p> <ul style="list-style-type: none"> ○ Colleagues ○ Committee ○ Customers ○ External organisation ○ Line management ○ Supervisor. <ul style="list-style-type: none"> • Design a presentation feedback form (of at least 5 questions) to gather comments from your audience on customer service needs and your proposed improvements. Provide a copy of the feedback form to your assessor. • Gather and analyse the presentation audience feedback on customer service needs and your proposed improvements. Explain your findings in a report i.e. did the audience agree, disagree, support your findings and ideas, reflect concern to change, etc. <p>You are required to provide your assessor with the following document/s:</p> <ul style="list-style-type: none"> • Part A- A questionnaire on customer service needs and analysis report with recommendations • Part B- A report on diagnosed customer service problems and options to improve customer service. • Part C- A PowerPoint presentation (printed 6 slides to a page), presentation feedback form and report on audience reaction to customer service needs and your proposed improvements. 	

Has the candidate met the following criteria for Task 1:

Candidate's responses may vary

- Part A- A questionnaire on customer service needs and analysis report with recommendations
- Part B- A report on diagnosed customer service problems and options to improve customer service.
- Part C- A PowerPoint presentation (printed 6 slides to a page), presentation feedback form and report on audience reaction to customer service needs and your proposed improvements.

Part A Assess customer needs

- The candidate should provide an example questionnaire (minimum of 10 questions) which will gather information on service needs of customers and areas in customer service that may be improved. Customer names should not be required.

Questions on customer service needs may relate to:

- Accuracy of information
 - Advice or general information
 - Complaints
 - Fairness/politeness
 - Further information
 - Making an appointment
 - Prices/value
 - Purchasing organisation's products and services
 - Returning organisation's products and services
 - Specific information.
- The candidate should collect questionnaire responses from at least ten customers
 - The candidate needs to provide a report on the analysis of the questionnaire findings and a recommendation on areas for customer service improvement

Part B Identify ways to improve customer service

The candidate should provide a report on the diagnosed customer service issues and problems and appropriate options to improve customer service. The improvement options need to be realistic.

The candidate needs to mention how the options meet the organisation's aims, objectives, and/or strategic requirements as well as provide opportunities for continuous improvement.

Part C Provide advice on improving customer service

- The candidate should provide a PowerPoint presentation of no more than 12 slides (printed 6 a page) which presents their findings from Parts A and B on service needs of customers and ways to make improvements.
- The candidate should arrange for a presentation with management, staff and other interested parties on customers' service needs and strategies to improve customer service. (If the candidate is in a simulated workplace environment, they may ask their fellow students to represent the audience.) The candidate should provide a suitable presentation feedback form (of at least 5 questions) to gather relevant comments from the audience on customer service needs and their proposed improvements.
- The candidate should provide a report on the analysed presentation feedback with comments relating to the audience's agreement, disagreement, support for the candidate's ideas on customer service, and/or the audience's concern to change, etc.

Project Tasks	Mapping
<p>2. In Task 1 you identified strategies and opportunities to improve customer service and meet the needs of customers. You presented and promoted these ideas to the appropriate organisational individuals and groups. It is now appropriate to organise the implementation of those strategies.</p> <p>Part A- Before implementation you will need to plan the implementation schedule and identify the who, what, when and how. Select one customer service objective and in a report (a table may be used) identify:</p> <ul style="list-style-type: none"> • The customer service objective i.e. What is the customer service goal? • The customer service strategy that is to be implemented i.e. What steps are required to achieve the goal? • The activities/tasks involved in the implementation i.e. A list of the activities/tasks that need to be undertaken • The staff required i.e. all staff, specific departmental staff (marketing, sales, etc), new casual employees, etc. • Budget i.e. financial resources required (costs to cover telemarketing phone calls, printing, advertising, newsletters, etc). Total estimated costs. • Other physical resources or supplies i.e. display stands, promotional boards, customer database, etc. • A schedule of timeframes for the activities/tasks i.e. Gantt chart • What resource and activity approvals need to be arranged and with whom i.e. job role/position to be identified (names are not required). If you are the responsible person and no further approvals are required, then this should be indicated in your report. <p>Part B- Before implementing your plan you need gain the necessary approvals and consult with management and staff to gather their comments and commitment to achieve improved levels of customer service. After you have received approval and management commitment, arrange a meeting with your staff to discuss the customer service improvement plans and gain their agreement on the plan and overall customer service objectives. If you are in a simulated environment, use your fellow students to act as staff. The meeting minutes are to be provided to your assessor. The minutes should demonstrate:</p> <ul style="list-style-type: none"> • Discussion by staff to demonstrate commitment to achieving the customer service goals i.e. support implementation activities • Discussion and agreement by individuals or small groups on activities/tasks, timeframes and physical and budget resources required • Discussion and confirmation as to what, when and how resources will be provided to individuals/groups to enable them to complete the activities/tasks <p>You are required to provide your assessor with the following document/s:</p> <ul style="list-style-type: none"> • Part A- A report on the implementation of one customer service strategy • Part B- Minutes of the consultative meeting to implement customer service improvements. 	<p>PC2.2, 2.4 RS1-3 RK1-4 CAE1, 3-4 ES1-8</p>

Has the candidate met the following criteria for Task 2:

Candidate's responses may vary

- Part A- A report on the implementation of one customer service strategy.
- Part B- Minutes of the consultative meeting to implement customer service improvements.

Part A- The candidate should select a customer service objective and explain in a table or report format:

- The customer service objective e.g. To reduce goods returned for replacement or refund by June 20XX. (clear, concise, realistic, measurable)
- The customer service strategy that is to be implemented e.g. Staff training, formal/informal feedback on performance, regular reviews with customers and staff on complaints, refunds, replacements.
- The activities/tasks involved in the implementation e.g. Individual and group activities/tasks including monitoring and reviews
- The staff required e.g. all full time and casual staff in sales.
- The budget needs to be a total of reasonable estimates. They do not need to be accurate e.g. Monthly costs
Customer feedback calls \$500.00
Newsletter mailouts \$300.00
Customer service training \$500.00
Staff feedback meeting lunches \$200.00
Total monthly budget \$1500.00
- Other physical resources or supplies e.g. training room and learning materials.
- A schedule of timeframes for the activities/tasks. The timeframes need to be reasonable and match the identified activities/tasks mentioned earlier.
- The responsible person mentioned who provides resource and activity/task approval needs to reflect a normal business structure. The person mentioned may be the candidate as they do not need to gain approval from another as they are the manager and are the deemed responsible person.

Part B- The candidate should provide minutes of a meeting that detail:

- A discussion by the manager and staff to support and facilitate achievement of the customer service goals
- A discussion and agreement by individuals or small groups on the activities/tasks, timeframes and resources required. The candidate's plans from Part A should be discussed.
- A discussion and confirmation by the candidate (manager) as to what, when and how resources will be provided to personnel/groups.

Project Tasks	Mapping
<p>3. As a manager you need to provide templates of letters for staff to use as examples of the standards and requirements of business letters when responding to customers' difficulties and complaints. Following the organisation's procedures and using templates when resolving customer difficulties and complaints encourages prompt action and ensures a standard approach in quality customer service. Customer complaints may be received as a letter, email, phone call or orally from the customer. The letter templates should display the content, structure, layout and format of two types of customer service letters- formal and informal.</p> <p>Procedures to resolve customer difficulties may include:</p> <ul style="list-style-type: none"> • External agencies (e.g. Ombudsman) • Item replacement • Referrals to supervisor • Refund of monies • Review of products or services • Using conflict management techniques. <p>Customer complaints may include:</p> <ul style="list-style-type: none"> • Administrative errors such as incorrect invoices or prices • Customer satisfaction with service quality • Damaged goods or goods not delivered • Delivery errors • Products not delivered on time • Service errors • Specific e-business problems and issues: <ul style="list-style-type: none"> ○ Difficulty accessing services ○ Inactive links ○ Not appreciating differing hardware and software ○ Services not available ○ Supply errors such as incorrect product delivered ○ Time taken to access services ○ Unfriendly website design ○ Website faults • Warehouse or store room errors such as incorrect product delivered <p>Develop examples of two template customer service letters- an informal and formal letter acknowledging the complaint, advising the customer the actions that will be taken in order to satisfy their needs, and that the organisation will look forward to satisfying their needs in the future. You should ensure the templates are readable, appropriate and mechanically sound as well as display:</p> <ul style="list-style-type: none"> • In the formal letter- seven standard parts of a business letter • In the formal and informal letter- use of the AIDA formula (attention, interest, desire, action) <p>You are required to provide your assessor with the following document/s:</p> <ul style="list-style-type: none"> • Two customer service letter templates when responding to customers' complaints- formal and informal letters. 	<p>PC2.3 RS1 RK2 CAE4 ES1-8</p>

Has the candidate met the following criteria for Task 3:

Candidate's responses may vary

Two customer service letter templates when responding to customers' complaints- formal and informal letters

The candidate should provide two sample customer service letters- an informal letter and a formal letter acknowledging the complaint, advising the customer the actions that will be taken in order to satisfy their needs, and that the organisation will look forward to satisfying their needs in the future. The letters should display the content, structure, layout and format to meet the standards and requirements of the business. The letters should be:

- Easily understood by the reader
- Appropriate for the audience
- Mechanically sound (grammar, spelling, paragraph and sentence structure)
- Displaying the seven standard parts of a business letter -in the formal letter and some of the parts in the informal letter
- Using the AIDA formula (attention, interest, desire, action)

Project Task

Mapping

The overall project task:

Compile all the above documents together. They will be assessed separately and then assessed for overall readability, which includes use of appropriate grammar and punctuation in sentences and paragraphs.

ES 1, 8

Has the candidate met the following criteria for the overall project task

Reports display appropriate readability by using appropriate grammar and punctuation in sentences and paragraphs.

Assessment checklist – Assessor Note

Please complete the assessment checklist in the Candidate Guide to record the assessment process and outcome.

The checklist contains a declaration by the candidate as follows:

- The purpose and outcomes of the assessment have been explained.
- I have received information about the unit of competency.
- I understand the type of evidence to be collected.
- The appeals system has been explained to me.
- I have notified my assessor of any special needs that may need to be considered during the assessment.

The checklist contains a section for the assessor to record the following:

- Whether RPL / Accelerated progression is required
- Whether Language / Literacy / Numeracy support is required
- Any other special needs

Assessment 3: Project

The following instructions have been provided to the candidate.

Instructions to Candidate

This activity is related to the unit of competency **BSBCUS401A Coordinate implementation of customer service strategies**. In particular, you will be required to demonstrate your skills and knowledge in relation to this unit of competency.

You may refer to your training materials and other research if required. The activity may be completed in the workplace or a simulated workplace.

Your assessor will use a checklist to record the assessment decision.

Overview

Below are a number of practical tasks to be completed over a period of time in a real or simulated workplace where you will perform the duties of a **manager**. The times for completion of the tasks are to be negotiated between yourself and the assessor. The tasks will reflect your ability to:

Project: Monitoring, evaluating and reporting on customer service.

Your assessor will provide you with instructions and complete a checklist on which they will record your satisfactory performance of workplace tasks.

The Project Tasks table below identifies the documents that you are required to prepare and submit in your evidence portfolio. They may be presented in printed format in a folder or as an electronic copy.

Ensure both your name and student number is clearly displayed.

Instructions to Assessor

The following benchmarks are supplied for you (the assessor). Please ensure when marking the candidate's work that you adhere to the prescribed benchmarks which are intended as a guide to ensure consistency of assessment.

Project Tasks	Mapping
The following tasks may be completed as a workplace project based on your own organisation and job role, or as a simulated workplace project based on a fictitious organisation, or an organisation you are familiar with.	
<p>1. Business strategies and standards are continually monitored and evaluated with the aim of identifying areas for improvement. Continual improvement in customer service requires the customer service systems and processes to be regularly and systematically monitored and evaluated.</p> <p>In Assessment 2 Task 1 you developed a questionnaire to gather feedback on customer service needs and areas for improvement. Now you need to re-evaluate the customer service being provided by the business since the changes in customer service were implemented (refer Assessment 2 Task 2).</p> <p>Part A- Using the reports from Parts A and B in Assessment 2 Task 1, identify 5-8 key performance indicators (KPIs) that you could use in monitoring and evaluating the current level of client satisfaction with customer service. The KPIs need to relate to the business aims, objectives, and/or strategies.</p> <p>Develop a client satisfaction survey checklist using the following headings:</p> <ul style="list-style-type: none">• KPI statement (list the KPIs under this heading)• Satisfied (checkbox or tick)• Not satisfied (checkbox or tick)• Comments/further improvements <p>Part B- Using the checklist from Part A, conduct a survey with your customers to review client satisfaction on the level of customer service currently being delivered.</p> <p>Step 1- The survey may be conducted using the internet, email, telephone, or face-to-face. You will need to gather a minimum of ten customer responses. If you are in a simulated environment, you may use fellow students, family and friends to act as customers.</p> <p>Customers may include:</p> <ul style="list-style-type: none">• Corporate customers• Individual members of the organisation• Individual members of the public• Internal or external• Other agencies.	PC3.1-3.4 RS1, 3 RK1-4 CAE1-4 ES1-8

Project Tasks	Mapping
<p>Step 2- Analyse the feedback from the survey and create a client satisfaction feedback report explaining your findings i.e. were the KPIs met? Has the level of client satisfaction with customer service improved? If not, why? Are further improvements needed?</p> <p>In your report you will need to:</p> <ul style="list-style-type: none"> • Refer to evidence gathered from the survey. • Make a comment on the areas in customer service that have been improved and also where further improvements could be made. • Provide advice and make a recommendation on the future direction of client service strategies for the business. Future directions should relate to the overall aims and objectives of the business. <p>Part C- The client satisfaction feedback information needs to be passed onto the manager and staff. Arrange a meeting with the manager, staff and any other interested parties to discuss your findings from the client satisfaction survey. If you are in a simulated environment, use your fellow students to act as the manager, staff and any other interested individual/group. The meeting minutes are to be provided to your assessor. The minutes should demonstrate:</p> <ul style="list-style-type: none"> • Discussion by the manager and staff to demonstrate acknowledgement of client satisfaction successes and commitment to take steps to make improvements where required to maintain customer service standards • Discussion and agreement by individuals or small groups on activities/tasks to be undertaken to improve customer service standards <p>Individuals and groups may include:</p> <ul style="list-style-type: none"> • Colleagues • Committee • Customers • External organisation • Line management • Supervisor. <p>Part D- To be successful in quality customer service, records need to be maintained so as to make past and future comparisons and identify areas that may cause future issues and problems. In a report explain the role and purpose of maintaining systems, records and reporting procedures to ensure continuous improvement in levels of customer service.</p> <p>You are required to provide your assessor with the following document/s:</p> <ul style="list-style-type: none"> • Part A- A client satisfaction survey checklist • Part B- A report on the client satisfaction survey • Part C- Minutes of a meeting with the manager and staff to discuss the client satisfaction survey findings • Part D- A report on the role and purpose of maintaining systems, records and reporting procedures on customer service. 	

Has the candidate met the following criteria for Task 1:

Candidate's responses may vary

- Part A- A client satisfaction survey checklist
- Part B- A report on the client satisfaction survey
- Part C- Minutes of a meeting with the manager and staff to discuss the client satisfaction survey findings
- Part D- A report on the role and purpose of maintaining systems, records and reporting procedures on customer service.

Part A- A client satisfaction survey checklist

The candidate should provide a client satisfaction survey checklist identifying 5-8 key performance indicators (KPIs) taken from Assessment 2 Task 1 reports. The KPIs need to relate to the business aims, objectives, and/or strategies referred to in Assessment 2 Task 1.

The client satisfaction survey checklist should use the following headings:

- KPI statement (listing the KPIs)
- Satisfied (only a checkbox or tick is required)
- Not satisfied (only a checkbox or tick is required)
- Comments/further improvements (sufficient blank space for a short comment)

Part B- A report on the client satisfaction survey

The candidate should provide a report on the analysed results of the client satisfaction survey conducted on at least ten customers. The candidate should comment on:

- Which KPIs were met- needs to refer to survey evidence
- Are clients satisfied with the level of customer service- needs to refer to survey evidence
- Where has the level of customer service improved- needs to refer to survey evidence
- Where are the improved areas and what areas require to be improved- needs to refer to survey evidence

The candidate needs to provide advice and make a recommendation on the future direction of client service strategies for the business. Future directions should be realistic and relate to the overall aims and objectives of the business as stated in Assessment 2 Task 1.

Part C- Minutes of a meeting with the manager and staff to discuss the client satisfaction survey findings

The candidate should provide evidence of a meeting between the manager, staff and any other interested parties where they discuss the findings from the client satisfaction survey. Students in a simulated environment may use fellow students to act meeting attendees. The minutes should demonstrate a discussion:

- By management and staff on client satisfaction successes and their commitment to make improvements where required in customer service standards
- By individuals or small groups on agreed activities/tasks to be undertaken to improve customer service standards

Has the candidate met the following criteria for Task 1:

Part D- A report on the role and purpose of maintaining systems, records and reporting procedures on customer service.

The candidate should explain the role and purpose of maintaining systems, records and reporting procedures to ensure continuous improvement in levels of customer service.

The candidate may mention:

- Consistency of service levels and processes to maintain and improve levels of customer service
- Provides comparative data
- Provides an organised approach to business improvement in customer service
- Provides effective and efficient mechanisms for continuous improvement
- Provides reporting responsibility levels
- Identifies acceptable performance levels and expectations of staff
- Identifies areas for staff training

Project Task	Mapping
<p>The overall project task:</p> <p>Compile all the above documents together. They will be assessed separately and then assessed for overall readability, which includes use of appropriate grammar and punctuation in sentences and paragraphs.</p>	ES 1, 8
<p>Has the candidate met the following criteria for the overall project task</p> <p>Reports display appropriate readability by using appropriate grammar and punctuation in sentences and paragraphs.</p>	

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