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The Wholesale and Retail Sector Education and Training Authority

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15 OCTOBER 2003

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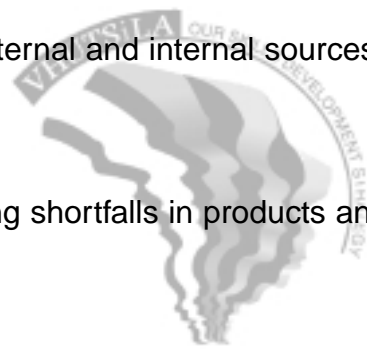
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Key of icons used in text

NB



Example



Definition



Activity



Self-assessment



Dear Learner

We welcome you to our workshop/learnership or as a distance learning candidate.

Congratulations on choosing to upgrade your skills. We believe that this is one of many workshops/distance courses that will develop and improve your skills.

Over the past couple of years and months, South Africa has made a significant shift from the old dispensation in education (where learners used to be bombarded with theory and very little practical work) to an outcomes-based education model (based on competency rather than on theory). The aim of the shift is to make the South African labour force more productive and show them how to apply the knowledge that they have gained from training programmes.

The programme you are about to start is outcomes-based and in line with the outcomes as stipulated in the applicable unit standard. The assessment is also in line with the assessment criteria as stipulated in the unit standard. Once you have been declared competent on the outcomes of this unit standard, you will receive **credits** towards a nationally recognised qualification.

On page vi-viii please see the cluster of unit standards that make up a qualification as well as a possible career path (page ix) for your future development. The significance of this is that in the past when you attended workshops or completed distance courses similar to this, it was usually seen as induction and did not count towards any form of qualification. As this qualification is based on the outcomes of a unit standard that is registered on the NQF, you will receive credits towards a formal qualification. Should you attend follow-up workshops/distance courses based on the unit standards, as on pages vi-viii, you will eventually end up with a recognised qualification which you can utilise in the greater South African labour market and which is also nationally recognised.

You will be assessed formatively and summatively. The formative assessment will be conducted as you work through the manual and the summative assessment at the end of the workshop/distance course. Assessment can also be defined as the method that is used to determine whether you have mastered the skills that you will be taught during this workshop/distance course. Assessment usually consists of two components, namely, instructional learning (as conducted during this workshop/distance course) and the workplace assessment - to determine your practical skills.

The purpose of the workplace guide will be to assess whether you can apply what you have learned.

Another added advantage to the new dispensation is the fact that recognition of prior learning is also considered and can count towards achieving credits to skills programmes, which in turn leads towards a qualification. Life experience, work experience and previous courses attended can be taken into consideration for recognition of prior learning purposes; should it relate to the specific skills programme or qualification that you are working towards. This is merely a brief introduction to the new dispensation and barely covers what one can learn about this.

We hope that this makes you as excited as it does us and it is a real privilege for us to be able to facilitate and assess you on the outcomes of the unit standards that we are about to start.

Please feel free to communicate any questions to your facilitator or to our customer service/information department.

Friendly regards

National Certificate in Retail and Wholesale Processes

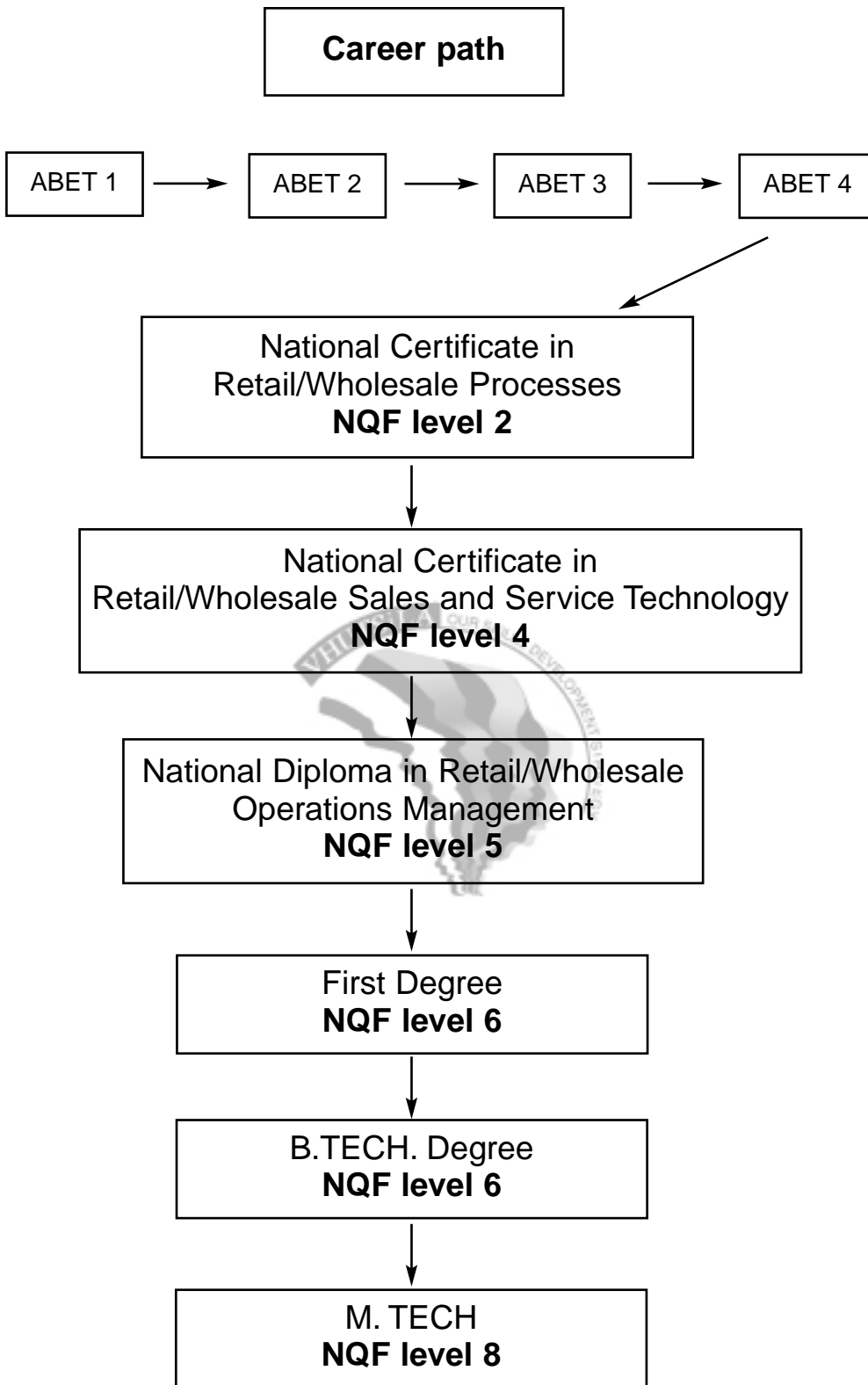
Fundamental	Core	Elective
<ul style="list-style-type: none"> Performing basic business calculations in retail & wholesale practices Credits: 6 RW/F/CALC/2 Compiling verbal and written communications in retail & wholesale practices Credits: 20 RW/F/COMM/2 Using computer technology in retail & wholesale practices Credits: 10 RW/F/COMP/2 	<ul style="list-style-type: none"> Handling stock Credits: 16 RW/C/STOCK/2 Attending to customers Credits: 20 RW/C/SERVE/2 Displaying and marking merchandise Credits: 8 RW/C/DISP/2 Applying safety, security and housekeeping Credits: 12 RW/C/SAFE/2 Understanding industry, structures, terms and concepts Credits: 8 RW/C/IND/2 Promoting merchandise Credits: 16 RW/C/PROM/2 Processing retail/wholesale documents Credits: 12 RW/C/ADMIN/2 Handling cash Credits: 12 RW/C/CASH/2 Processing credit transactions (optional) Credits: 8 RW/C/CREDIT/2 	<ul style="list-style-type: none"> Applying furniture and appliance in retail & wholesale practices Credits: 20 RW/E/FURN/2 Applying CFTA in retail & wholesale practices Credits: 20 RW/E/CFTA/2 Applying food handling in retail & wholesale practices Credits: 20 RW/E/FOOD/2 Applying speciality merchandise in retail & wholesale practices Credits: 20 RW/E/CONS/2

National Certificate in Retail and Wholesale Sales and Service Technology

Fundamental	Core	Elective
<ul style="list-style-type: none"> • Compiling and delivering presentations and persuasive written communications to enhance retail & wholesale practices Credits: 20 RW/F/COMM/4 • Interpreting financial reports in retail & wholesale practices Credits: 10 RW/F/REP/4 • Generating electronic data to enhance retail & wholesale practices Credits: 6 RW/F/COMP/4 	<ul style="list-style-type: none"> • Processing stock Credits: 12 RW/C/STOCK/4 • Providing customer service Credits: 16 RW/C/SERVE/4 • Monitoring cash systems in retail & wholesale Credits: 12 RW/C/CASH/4 • Co-ordinating promotional activities Credits: 16 RW/C/RPOM/4 • Monitoring flow of retail & wholesale documents Credits: 12 RW/C/ADMIN/4 • Monitoring credit in retail & wholesale (optional) Credits: 20 RW/C/CREDIT/4 • Selling goods and services (optional) Credits: 16 RW/C/PROD/4 • Buying merchandise (optional) Credits: 20 RW/C/MERCH/4 	<ul style="list-style-type: none"> • Implementing furniture and appliance in retail & wholesale practices Credits: 20 RW/E/FURN/4 • Implementing CFTA in retail & wholesale practices Credits: 20 RW/E/CFTA/4 • Implementing food handling in retail & wholesale practices Credits: 20 RW/E/FOOD/4 • Implementing speciality merchandise in retail & wholesale products practices Credits: 20 RW/E/CONS/4

National Certificate in Wholesale and Retail Operations Management
(Level 5)

Fundamental	Core	Elective
<ul style="list-style-type: none"> Influencing stakeholders of a retail & wholesale business Credits: 15 Level: 5 RW/F/COMM/5 	<ul style="list-style-type: none"> Understanding industry, structures, terms and concepts Credits: 8 Level: 2 RW/C/IND/2 Displaying and marking merchandise Credits: 8 Level: 2 RW/C/DISP/2 Processing stock Credits: 12 Level: 4 RW/C/STOCK/4 Managing the operations of retail/wholesale business Credits: 25 Level: 5 RW/C/OPS/5 Managing the cash in a retail/wholesale business Credits: 20 Level: 5 RW/C/CASH/5 Managing and leading people in a retail/wholesale business Credits: 25 Level: 5 RW/C/PEOP/5 	<ul style="list-style-type: none"> Co-ordinating promotional activities Credits: 16 Level: 4 RW/C/PROD/4 Selling goods and services Credits: 16 Level: 4 RW/C/PROD/4





Individual pre-course assessment checklist

A1

Individual pre-course assessment checklist

Please remove pages A2-A5 from your manual and complete them. Hand them in to your facilitator **or** if you are a distance learning candidate remove and file in your portfolio of evidence under the section **“INDIRECT EVIDENCE”**.

Date:

Name:

Company

Tel: Fax:

E-mail:

.....

.....

.....

.....

.....

.....

.....

.....



Pre-course assessment

Name: _____

ID no: _____

Unit standard: Providing customer service

Unit standard no.: RW/C/SERVE/4

Competency	Please tick one of the following					Comments on how competence was achieved	Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills		Yes	No
When a customer has a problem, I always listen, show empathy, make notes, find out what the customer wants me to do.								
I can explain our record systems with confidence.								
I always try to ensure that I keep my part of our customers' record system current.								
My records on customers are always up-to-date.								
I prefer to rely on my memory rather than a record system.								
I know exactly where to look for product information.								
I know exactly where to find information on our customers.								



Competency	Please tick one of the following					Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills	Yes	No
I make notes of expressed customers' needs to see if we cannot include them in our products or services.							
I regularly make suggestions about improving our customers' service.							
I try to use every available opportunity to expand my network of contacts.							
I regularly visit trade fairs to expand my product knowledge.							
I insist that I be informed and trained on new products or services introduced to our organisation.							
I make a point of walking around our organisation to see what new products or services we have.							
I regularly meet with or talk to my colleagues on ways to improve our service to customers.							



Competency	Please tick one of the following					Comments on how competence was achieved	Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills		Yes	No
I make a real effort to eliminate shortcomings in our products or services.								
I am always on the lookout for changes in customers' needs.								
I cope very well with changes to our products or services.								
When I perceive a change in customers' needs I bring it to the attention of my manager as soon as possible.								
Changes in customers' needs don't bother me much.								
I resist changes in our organisation.								



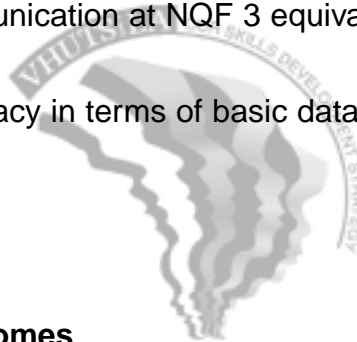
Unit standard

A2

Unit standard number	RW/C/SERVE/4
Unit standard level	NQF 4
Credit value	16
Field	Services
Subfield	Retail and Wholesale
Issue date	1 June 1999
Review date	31 May 2001

■ **Learning assumed to be in place**

- English communication at NQF 3 equivalent
- Computer literacy in terms of basic database and spreadsheet programmes



■ **Specific outcomes**

The demonstrated ability to make decisions and consider options when:

- Responding to customers' queries and complaints by offering a range of solutions for resolving customers' dissatisfaction in retail/wholesale outlets
- Recording telephonic queries and complaints to initiate future actions for customers' dissatisfaction in retail/wholesale outlets
- Negotiating with internal and external resources for providing effective solutions to customers' queries/complaints in retail/wholesale outlets
- Identifying and alerting co-workers to shortfalls in products and services in retail/wholesale outlets

- Updating and maintaining customers' information using a range of data capturing processes for recording customers' details in retail/wholesale outlets

■ **Assessment criteria**

The ability to produce all of the following types of evidence:

- Describe organisational policy on customer service for retail/wholesale outlet
- Describe organisational procedures for handling customers' complaints/queries
- Demonstrate techniques for updating and maintaining customers' information records in retail/wholesale outlets
- Demonstrate techniques for providing customer service using internal and external communication channels to resolve customers' queries/complaints
- Demonstrate techniques for alerting co-workers to shortfalls in product and service delivery retail/wholesale outlet.

(The evidence must be judged by a registered retail assessor, both in-store and at the training centre.)

■ **Range statement**

- Solutions for resolving customers' dissatisfaction, including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet
- A range of data-capturing processes for recording customers' details in retail/wholesale outlets, including manual/electronic data-capturing systems

■ **Notes (1) : Embedded knowledge**

The demonstrated understanding of:

- Verbal communication and negotiating techniques for dealing with internal and external customers
- Organisational procedures/processes for recording and dealing with customers' complaints/query details
- Knowledge of ranges of merchandise, pricing structures and delivery procedures for merchandise stocked by associated retail/wholesale outlets
- Organisational structure and internal/external resources/communication channels for resolving customers' queries/complaints

■ **Notes (1) : Critical cross-field and development outcomes**

The ability to:

- Organise oneself and one's activities when resolving complaints so that internal stress is controlled when handling customers' conflict situations
- Collect and critically evaluate information when responding to telephonic queries and complaints so that appropriate solutions are offered to dissatisfied customers
- Communicate effectively when negotiating with internal and external resources so that customers' requirements are clearly understood and effective actions are initiated to resolve customers' dissatisfaction
- Work with others as a team when informing co-workers of shortfalls in product and service delivery so that all co-workers are committed towards rectifying customers' dissatisfaction
- Use science and technology effectively so that customers' information is accurately recorded and regularly updated
- Understanding the world as a set of related systems where a clear understanding of customers' expectations leads to providing the correct solutions for resolving customers' dissatisfaction



Providing customer service

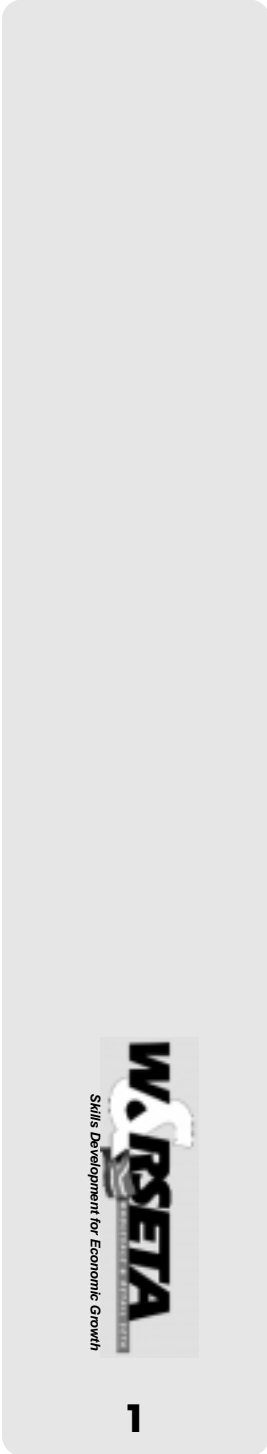
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Module

1

Solving problems for customers

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Specific outcomes

- Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets.
- Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail or wholesale outlets

Assessment Criteria

- Successfully identify customer complaints using relevant techniques to maintain customer satisfaction.
- Identifying appropriate solutions to customer complaints that leads to customer satisfaction.
- Responding to customer queries through display of product/service knowledge.
- Responding to customer queries or complaints utilizing organisational support systems, policies and procedures.
- Maintaining a balance between the needs of customers and the interests of the organisation.
- Keeping the customer informed of progress concerning problems raised.
- Maintaining customer relations while resolving customer queries or problems.

■ Where do customer problems come from?

No matter how hard we try to provide the best possible service to our customers and try to think of everything possible when dealing with a customer, things sometimes still go wrong.

As long as we deal with and rely on people and manufactured items, problems will creep in and we may be disappointed. It is only human. If we are however committed to excellent customer service and have a passion for it, it should not detract from our efforts to keep on wanting to get it perfect.

Many times employees and managers become cynical about the whole issue of customer service and start to question whether it is worth the effort.

It is not uncommon to come across some of the following views about customer service when talking to people who had to deal with things that had gone wrong:

- "Customers simply complain about anything. They can simply not be satisfied no matter how hard you try."
- "The customer will not use our service again, so why bother trying to remedy the matter in the first place."
- "Some customers are just natural trouble makers and will never be satisfied, so why bother?"
- "I do not have the time to concern myself with customer complaints, I have a business to take care of."
- "I only concern myself with serious customer complaints that might have a serious impact on my business, The less important complaints are not worth worrying about."

One can perhaps have long debates about these points of view but the bottom line is, the "Customer is King". It has been recognized for

Notes

■ Why do customers have problems?

There are many reasons for customers having problems. Some of the more common ones are listed below:

- They did not get the product or service they want to satisfy their needs.
- They are unhappy with the quality of the product or service they have purchased.
- They have been inconvenienced by the systems, procedures and/or "red tape" of the organisation where they bought the product or service.
- They have been upset by someone in the organisation, either because that someone has been rude or bad-tempered or because someone has been careless or made a mistake.
- Negligence on the part of the organisation has resulted in their initial minor complaint which is now becoming a major issue.

From the above it is quite obvious that customers have problems because organisations provide bad customer service!

The sad thing is that many organisations still do not pay much attention to customer service or pay lip service to the concept. They decorate their walls with impressive slogans or declared commitments to customer service yet what they practise is very far removed from what they preach.

It must be understood that customer service is not only important in the local or national market that your organisation serves. Collectively the attitude of South African organisations, both Public and Private, projects the image of the country as a whole in terms of customer service to the rest of the world.

Notes

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South Africa as a country currently ranks very low on an international rating scale on many issues, not the least of which is customer service. This can severely affect our ability to become an economic power and compete internationally. The power of the customer in the local, national and even global environment must never be underestimated.

The Power of the Customer

A disgruntled American who claims that South African Airways on one of their flights treated him very poorly proves this point. He went so far as to create a website calling it 'neverflysaa.com". SAA is now trying to obtain a court order to stop this person from continuing to operate this website. The sad thing is that hundreds of other customers, disgruntled with the service of SAA, are now telling their stories on this website as well!

Whether the complaint of this customer is valid or not is irrelevant. The fact of the matter is that through use of technology he /she is damaging the image of SAA and it may lose many potential and existing customers as a consequence.

Sunday Times – 27 January 2002

Every customer problem (big or small), which is not dealt with efficiently, may result in:

- Lost customers.
- Competitors reaping the benefits from your poor customer service as customers vote with their feet.
- A dissatisfied customer telling 5 – 10 others of his/her bad experience, resulting in the loss of unknown quantities of potential customers.

Many organisations also reason that if their product or service is good and their prices are competitive then they are doing well. They forget that that is only half the recipe for business success.

Businesses, which offer the best choice and value at the best prices, together with the best customer service, will both keep their existing customers and draw new customers to do business with them.

- Think back to an occasion when you were a customer and had a problem that was not well handled. What was the problem?

- Why did you feel it was not handled well?



Notes

Activity





Activity



- Describe how you felt about it

- Did you tell other people about your experience? Who were they?

- Will you do business with that organisation again?

■ How do I solve a customer's problem?

Before getting into the various possible steps that you can take to ensure that you resolve a problem satisfactorily, it is wise to consider another aspect that is vital to customer service in general and solving customer problems in particular.

One can attempt to resolve a customer problem in a fairly "mechanistic" way, that is, memorizing the problem solving procedure and applying it as a matter of routine. The chances are that you may solve the problem but still lose the customer. Why?

It is a matter of solving problems effectively and doing it with the correct attitude. A customer who perceives that by attending to his/her problem you are doing them a favour or that they should feel guilty or indebted to you because of your "sacrifice of time and resources", is a customer lost forever.

- Correct attitude towards customers is displayed in the following ways:
 - Treating customers with courtesy and efficiency.
 - Treating customers as individuals with individual needs.
 - Putting customers first, rather than routines, systems or procedures.
 - Making customers feel valued.
 - Giving each and every problem (no matter how small or insignificant it may appear to you), equal care and attention.
 - Always aiming for maximum customer satisfaction.

■ Understanding the Problem

Solving problems successfully and efficiently requires a structured approach or methodology. To follow this procedure and make it part of your natural behaviour requires practice, practice and more practice.

Notes

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Somebody once summed up the general approach of many people to problem solving in this very catching phrase; “The most exercise that a lot of people get is by jumping to conclusions, passing the buck and dodging the issues”.

It is so easy to also fall into that trap. Few people like to be faced with problems and even fewer like to be the one expected to solve them!

Activity



Think about the way that you usually tackle a problem when you are expected to resolve it. Tick the statements below that describe your behaviour best.

- I need only to hear part of the story to be able to know what the problem is.
- I try to think of possible solutions while the customer is explaining the problem
- I try to find out who is to blame for the problem occurring.
- I usually have a solution long before the customer has finished his/her story.
- I ask the customer to put the complaint in writing to give us time to consider it.
- I don't need to know all aspects of the problem to know what to do.
- I try to get rid of the customer as quickly as possible, using promises because complaining customers irritate me limitlessly.

Before you can start to solve your customer's problem, you must be absolutely clear about the nature of the problem.

Not all customers have the ability to explain their problem with equal clarity. Some customers have the ability to explain exactly what is wrong, whilst others may give a confusing or rambling description. Some people may be so angry or upset that it can be very difficult to get a clear picture.

Your first task when dealing with a customer problem is to identify exactly what is wrong and why the customer is unhappy. Not until you do this will you be in position to help.

To make sure you identify exactly what is wrong you must:

- Listen carefully to what the customer is saying.
- Not interrupt the customer or try to finish their sentences.
- Look the customer in the eye, nod, smile, and project a supportive body language.
- Try not to think of possible solutions while the customer is explaining.
- Ask questions.
- Show empathy for the customer. Try to put yourself in the customer's shoes and see the problem from his/her perspective.
- Take notes of important points and issues.
- Summarise how you understand the problem to verify correct problem identification.

NB



Helpful tips



Activity



Identifying the problem.....?

Receptionist: "Good morning sir, how may I help you?"

Customer: "Good morning, I have been sent here about a problem with....."

Receptionist: "Sorry sir I cannot help you. Please go to our Complaints Department and speak to the clerk at counter no 2."

Customer: "But er..."

Receptionist: "Don't worry sir, she will be able to help you."

Clerk at

Counter no 2: "Morning, How may I help you?"

Customer: "Morning I have been sent here about a problem with...."

Clerk: "Please complete these two forms in duplicate and hand them to the clerk in Room no 5 on the first floor."

Customer: "But I thought....."

Clerk: "Not to worry sir, our complaints procedure is well organized and very efficient."

Clerk,

Room no 5: "Can I have the forms please?"

Customer: "Here they are, I have completed them but I don't..."

Clerk: "Thank you sir, you have done well. Please take this copy down to our receptionist and she will finalise the matter for you."



Notes

When you are dealing with customer problems, the key pieces of information you need to gather from the customer are:

■ **What does the customer think the problem is?**

People have the ability to look at the same situation and perceive it in totally different ways. This is ascribed to numerous factors such as culture, religion, education, experience etc. Perception can be defined as "reality as seen through my eyes."

It is therefore very probable that a customer may have quite a different view and understanding of a problem, than what you may have.

Activity



• **What is the real problem?**

Recently an organisation involved in education and training wanted to have the examination papers of two of its candidates re-marked. The examination papers were set and marked by an independent examining body and the re-marks had to be performed by this independent body as well.

The training institution sent one of its staff members to register the re-marks with the examining body and pay for it at the same time.

The customer arrived at the premises of the examining body at 11:45 and to her astonishment the Receptionist informed her ... "Sorry all our staff members are attending a staff meeting. There is no one available to accept the re-mark registration forms and payment. If you want to, you can wait until 13:00 when they will be back."

What do you think the real problem of the customer was in this case?



Notes

The reason why many problems re-occur after we think we have solved them, is because we do not get down to identifying the real problem. We tackle the symptoms of the problem and quickly address them, leaving the real problem unresolved.

In the example above and many similar situations, we may be inclined to see the real problem as poor customer service and decide that the receptionist needs to be thoroughly disciplined. That would certainly make the customer happy.

The customer would most probably agree that the attitude displayed by the receptionist leaves a lot to be desired and taking some action against the receptionist may seem quite appropriate. The fact of the matter is, however, that after that has been done, the candidates who require a re-mark are still not registered!

NB



The real problem the customer has, is to get her students registered. To correct the poor customer service needs a solution to help the customer register her two students, without causing her any further inconvenience.

■ What is the history of the problem?

Having identified the problem you need to obtain further information as below, if applicable:

- When did the problem occur?
- Has the customer (or other customers) complained about this problem before?
- What, if anything, has already been done so far to rectify the problem?

■ What is the current situation?

- What is happening right now? What is wrong with the product or service?
- Where is the product?
- In what condition is the product?

■ What does the customer want?

- What, for the customer, would be the ideal solution?

Remember, their ideal solution may be different to yours. For instance, you might think they want the receptionist disciplined when, in fact, they want to register their students first and foremost.

Clearly, you will only be able to obtain all this information by careful listening and questioning.

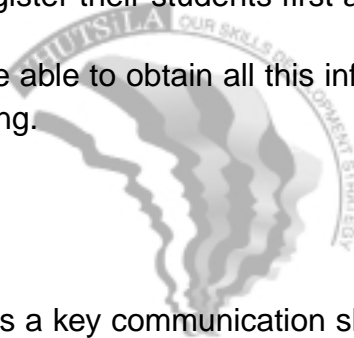
■ Listening

Even though listening is a key communication skill, we often find that listening with our full attention is something which is quite difficult to do.

This is because, every day, the average person is bombarded with thousands of messages in the form of both spoken and written words. We receive messages as:

- face to face conversations
- telephone conversations
- overhead conversations
- newspapers and magazines

Notes



Notes

- letters
- bills, reminders, parking tickets, junk mail
- radio
- television
- billboards and other large advertising displays

If we were to pay full attention to every message that is directed towards us, we would have brain overload. So, instead of paying full attention, we tend to filter-out most of the incoming messages and only really listen to those which we perceive as important for us. For example, if you have the radio on at home whilst you are reading a book, providing you are absorbed in your task, you will filter-out the sound. But if a favourite programme comes on you will tune-in to that and suddenly become aware of what you are missing, even though the volume on the radio has not been turned up.

As a result, all of us are very good at not listening, and usually not so good at listening. We can easily fall into the habit of thinking:

- "Oh no, I've heard this before!"
- "I'm not interested in this!"
- "Here we go again!"
- "I know about this, so I don't need to listen"

We become passive rather than active listeners which means that, when someone talks to us, we can easily switch off to concentrate on our own thoughts. Even though we may give the appearance of listening, we are actually paying very little attention either to the speaker, or what is being said.

The following activity will give you an opportunity to think about how you respond when you are not being listened to.



Recall a situation where you were not being listened to. Answer the following questions relating to that situation.

- What was it that made you realize you were not being listened to?

- How did you feel about not being listened to?

- What effect did this have on your attitude towards the other person?

Activity



Notes

In response to the last activity you probably said that you know when somebody is not listening because of their body language, (non-verbal communication). Clearly, if someone is looking at the ceiling, yawning, continually checking their watch or looking away from you, then they **are not listening and not paying attention**.

And it is more than likely that you will have said that when you are not being listened to you feel:

- Angry
- Irritated
- Disappointed
- As though carrying on with the conversation would be a waste of time
- That you did not feel as though you want to listen to anything the other person has to say to you

Obviously if there is someone, either at work or at home, who consistently does not listen to you, then this is bound to have a bad effect on your relationship with them.

Activity



How do you rate your listening skills? Do you:

- Switch off people who say something you don't agree with or don't want to hear?

Never	Sometimes	Most of the time
-------	-----------	------------------
- Concentrate on what is being said, even if you are not really interested?

Never	Sometimes	Most of the time
-------	-----------	------------------
- Assume you know what the speaker is going to say next and stop listening?

Never	Sometimes	Most of the time
-------	-----------	------------------



- Think about what you are going to say next while a person is still talking?

Never Sometimes Most of the time

- Daydream while the speaker is talking?

Never Sometimes Most of the time

- Listen to the speaker without judging or criticising or jumping to conclusions "inside your head" while they are talking?

Never Sometimes Most of the time

- Finish the speaker's sentences for him/her

Never Sometimes Most of the time

- Listen more carefully to important people and less carefully to less important people?

Never Sometimes Most of the time

Activity



Notes

Switching off	Even though the person speaking may be telling you something you do not want to hear, or something you disagree with, switching off or tuning them out will not help the situation. In fact, it will probably make matters worse because once they realise you are not listening they will become irritated and annoyed.
Concentrating	Effective listeners concentrate on the message and really try to understand what is being said.
Assuming	Although it is often easy to assume we know what is coming next or that we have heard it all before, we can never really be sure. Making assumptions about what the speaker is going to say can be very dangerous, particularly when dealing with customer complaints.
Thinking ahead	It is impossible to simultaneously concentrate on what is being said and think about what your reply will be. Effective listeners consider what they want to say only after the speaker has finished speaking.
Daydreaming	Daydreaming or just giving the appearance of listening is a waste of time and extremely unprofessional.
Mentally judging and/or criticising	It is impossible to give the speaker your full attention if you are mentally judging or criticising some aspect of what they are saying or their appearance or personality or mannerisms.
Finishing sentences	Even when the speaker is long-winded, confusing or confused, effective listeners never interrupt, talk over or finish other people's sentences for them. Yes, it can be difficult, but effective listening is hard work sometimes!
Status	Effective listeners pay equal attention to everyone, and do not allow a person's status, (regardless of whether the speaker is the Managing Director of the Company or the most junior member of the team), to affect how well they listen.
Non-Verbal Communication	Body language is a very powerful means of communication. The way we stand, look at people, use our arms and so on can all signal how we are feeling. If, for example, we are feeling nervous, bad tempered, bored or unfriendly, other people can easily detect this from our body language, even if we have not said a word!

Notes

Negative Body Language, which shows you are NOT listening includes

- Turning away.
- Frowning, glaring or remaining impassive and "stony-faced".
- Leaning back, arms folded, or behind your head.
- Refusing to maintain eye contact, looking away or gazing over the speaker's head.
- Foot or pen tapping.
- Drumming on the table/desk with your fingers.
- Shuffling papers
- Looking at your watch, computer screen, gesturing to colleagues .



■ **Questioning**

Asking the right kinds of questions will often be the only way to find out:

- What the problem really is
- What the customer really wants you to do about it

There are three types of questions which can be asked, and it is important that you understand the difference between them and know which kinds of questions should be used to gain the maximum amount of information.

Closed questions	<p>Closed questions generally invite a one-word, factual answer, most usually "Yes" or "No".</p> <p>Some examples of closed questions are: Did you pay cash for this? Answer 1 : Yes Answer 2: No Is it broken? Answer 1 : Yes Answer 2: No</p> <p>Closed questions will not encourage the customer to give you a great deal of information, and will generally not help very much in trying to identify and solve a problem.</p>
Leading questions	<p>Leading questions should also be avoided because they suggest to the customer that you expect a certain kind of answer. Leading questions will not help you to get to the root of the problem, and may annoy customers. Some examples of closed questions are:</p> <ul style="list-style-type: none"> • I suppose you read the instruction manual, didn't you? • Do you realise the guarantee expired more than 5 months ago? • I don't suppose you kept the battery fully charged, did you?
Open questions	<p>Open questions generally begin with:</p> <ul style="list-style-type: none"> • How? • Why? • What? • Who? • When? • Where? <p>and will provide you with maximum amount of information. This is because they require the person being asked the question to really give the matter some thought. Some examples of open questions are:</p> <ul style="list-style-type: none"> • How did you start the lawnmower? • When did you first notice the problem? • How have you tried to repair it? • Why do you think that the lift mechanism does not work? • Where does the fault seem to be? • What seems to be wrong with the mechanism? • Who have you spoken to about this?

Notes

Notes

■ Understanding and Owning the problem.

It is important that the customer realizes that you acknowledge the problem and that you are taking ownership of it. Never say:

- "I don't think there is a problem here."
- "It is your fault not ours."
- "I am sorry, it is not my responsibility."
- "There is nothing we can do about this."

The best way to show a customer that you understand the customer's problem is to summarise key points of what they have said.

- "You bought this from our store and it is not working. Is that right?"
- "Am I right in my understanding that you have paid for this service more than a week ago and no one has showed up to render it?"

■ Doing something about the problem.

Customers are angry or dissatisfied when they raise a question, but most of them are also very reasonable when their problems seem to be addressed.

NB



What makes a customer furious is when an organisation promises to resolve the problem as agreed and then does nothing about it. That really adds insult to injury!

When you have agreed to a method of solving a problem with a customer, make sure that you:

- Have the necessary authority to do what you have agreed to do.
- Set the process in motion as soon as possible.
- Inform colleagues/co-workers/departments involved of the actions required.
- Check on the date promised that action has taken place.
- Contact the customer to ascertain satisfaction.

■ **Recording complaints and problems**

We all learn from our mistakes, or should do. When an organisation gets a number of similar complaints, it is a sign that things need to be put right. No one will know whether the problem is one that keeps recurring unless there is a proper system of recording.

Recurring problems must be brought to the attention of the appropriate person. For example, if there is a stream of complaints about the time it takes for the switchboard to answer a call, the manager responsible must be informed.

One way to record recurring problems is to make a list of requests and comments made by customers. This could also include a list of goods or services that seem to be causing problems. Lists could also be drawn up for complaints against staff or delays in deliveries.

Once the information is available, you or your managers can act, trying to remove the causes of the recurring problems.

The way you record customer complaints will differ from organisation to organisation. There may be a complaints record that has to be filled in each time a customer has a problem. There may be follow-up questionnaires designed to pick up any dissatisfaction. Whatever the system, there should be clear procedures.

Notes

Activity



What follows is a number of statements. You are required to decide whether the statements are **true** or **false**.

1. Some customers cannot be satisfied, no matter how hard I try. True False
2. I should only concern myself with serious customers' problems that may have an impact on my business. True False
3. Customers are only dissatisfied if the product they buy does not work. True False
4. Minor problems can become very large issues. True False
5. Dissatisfied customers will tell 5 to 10 people about their experience. True False
6. Solving customer dissatisfaction problems requires a structured, methodical approach. True False
7. As long as I hear part of the story, I know exactly what the problem is. True False
8. When listening to a customer's complaint I should never interrupt, or finish the sentences for them. True False
9. After I have heard the complaint it is a good idea to summarise what I have heard to check my understanding. True False
10. Perceptions are important. Perception can be defined as "reality as seen through my own eyes". True False
11. I do not need any of the history of the problem. I just need to know what the current situation is. True False





12. Everybody is automatically a good listener. You must just hear what the other person is saying.

True	False
------	-------

13. If customers perceive that you are not listening to them, they can become angry, frustrated or irritated.

True	False
------	-------

14. Positive body language is important when listening to customers.

True	False
------	-------

15. The customer will always give you all the information you require to solve a problem. There is no need to ask questions.

True	False
------	-------



Activity



Updating and maintaining customer information

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Specific outcomes

- Updating and maintaining customer information using a range of data-capturing processes for recording customer details in retail/wholesale outlets

Assessment Criteria

- Records are regularly and accurately checked, updated and corrected.
- Documentation is comprehensive, correct in detail and contains relevant facts.
- New information is captured into record storage systems following organisational procedures.
- Out-of-date information is dealt with as directed.
- Stored records are maintained in good order in the appropriate location.
- Others can retrieve records easily.
- Suggestions for improvements of record systems are based on customer needs.



■ Why keep records?

It may seem a strange question to ask, but occasionally it may be necessary to ask the reason for and consider the effectiveness of the systems we use, because any use of resources has to be for a purpose and that purpose must benefit the organisation. Keeping records is time-consuming and we must therefore be aware that they serve a useful purpose for the department or organisation.

- Draw up a list of record systems that your organisation keeps to maintain customer records and information.

- In what format are these records kept?

- Who is responsible for keeping and maintaining them?

Notes

Activity



When you visit your doctor he or she does not rely on his/her memory, or for you take your own notes with you. He or she keeps a comprehensive record of your health and medical history.

By referring to this the doctor has a picture of your background and your situation and updates the records after the consultation. The records not only have your personal details, but a history of ailments, treatments and current condition so that the doctor can respond to your needs.

Keeping records about customers for customer service purposes is exactly the same. You will need to keep a certain number of records so that you can respond promptly and accurately to your customers to meet their needs.

■ Why can you not rely on memory alone?

Memory has some distinct advantages. It is usually convenient, quicker to use and is more flexible and it is always available.

- However, it does have some disadvantages, which you must have experienced and which caused serious embarrassment. Write those down below:

- What could you have done to prevent the situation?

Notes

Activity



Notes

Memory can fail you. Unless you have an incredibly good and organised memory, it is possible and likely that you will forget. We are all subject to pressures and a sudden telephone call, distraction or emergency will serve to put other things to the back of our mind and if it is recalled it may be too late or is recalled at a time when we can't use it.

It is personal to us. People cannot share our memory or read it, so if we work as team or want others to take action, we need to communicate with them.

People cannot read our memory, unless we deliberately tell them and they remember. It is easier to put it in writing.

It is temporary. Memory has a limited span and it generally deteriorates with time. Information in written form has a virtually indefinite span and can be stored and accessed at will.

It is visible evidence. Because memory is fallible, customers sometimes forget that they have agreed to something and many want visual “proof” of agreements, payments etc. It is often difficult to convince people unless they see it.

Valuable evidence. Although a verbal contract can be legally binding, it is normal practice to have some written form of evidence regarding the terms and conditions of the contract and it is reasonable and indeed useful for both you and the customer to have copies of these.

■ **What kind of records does your organisation keep?**

- Copies of contracts or agreements.
- Accounting records, recording payments, balances, etc.
- Personal details
 - Name-
 - Address-
 - Telephone numbers, fax numbers, E-mail addresses
 - Other specific personal details to aid service (e.g. how to contact)

Notes

It is likely that you will have systems in place which will collect/collate and update records that are kept, and it is essential that they are efficient, for it is easy for records to become out of date, which can cause problems.

■ Using computerized record systems

The capabilities are great, so are the potential limitations.. Unless the database has facilities built in, it may be difficult to add individual notes ('works nights', contact Mr. Jones (telephone no.)), etc. Not all correspondence is kept on computer (and if it is, it will be on a different programme).

NB



Don't forget GIGO (garbage in, garbage out) - whatever you put in will come out. Don't forget also that the computer is an electronic unit and interruption of electricity supply can cause havoc.

Back up regularly - at least once a day, and be prepared for difficulties.

■ Using Card Systems

Like computers, cards are easily accessible, easy to use and convenient, but there are limits to the amount of information that can be stored and subsidiary information will be required in many cases. Their uses are limited in that usually only one person at a time can use them.

■ Suspended File Systems

Very popular in use, suspended files are cheap, able to store large amounts of information in document form and can be accessed

relatively easily through an efficient filing system. They are difficult for more than one person at a time to use, limited in physical space and are prone to misfiling or mislaying.

Types of records used for customer service purposes.

- Personal details of customers (name, address, contact numbers)
- Other customer details (products/services records, purchased, maintenance schedules, guarantees, warranties, product/service histories)
- Customer financial records (past and current information)
- Customer agreements
- Organisational policies, procedures
- Price lists and structures
- Discount structures
- Credit policies
- After sales service – schedules and contracts
- Product and service information
- Information on competitors products, services
- Limits of Authority

■ Who holds information on customers in the organisation?

Service departments will hold records of any services carried out for the customer and any particular aspects of the application. It is not unknown for changes or alterations to be made without other departments being made aware of them.

Technical departments that will keep records of any technical aspects or applications that affect customer services.

Notes

Notes

Sales and Marketing departments keep records of customers for purposes of servicing them with new product or service information, re-ordering and after sales support.

Financial departments will keep records of all financial transactions and customer accounts information relating to the customers of the organisation.

Public relations departments will keep customer information for purposes of maintaining and improving the image of the organisation by regularly supplying customers with general information of the activities of the organisation.

Contracts departments will keep copies of all contracts and formal agreements with customers.

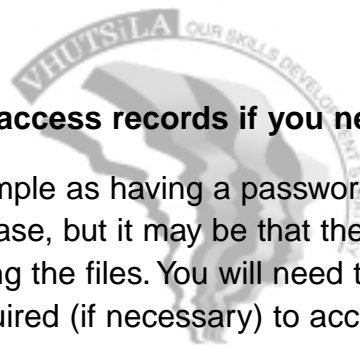
■ How can you access records if you need to?

Often it may be as simple as having a password if they are all contained on a database, but it may be that there is a company procedure for obtaining the files. You will need to know the procedure and the authority required (if necessary) to access the information.

■ Confidentiality of Customer Information.

From a customer service perspective it is also very important to protect the confidentiality of a customer's information. Customers do not appreciate information about their purchases, credit ratings and other personal information being misused by organisations.

Many unscrupulous organisations "sell" customer information to marketing agencies for marketing purposes. It is advisable to obtain authorization from a customer first before making any of their information available to any third party for whatever reason.



■ Recording the needs of customers

- How are customer needs recorded in your organisation?

- In what form are they kept?

- Are they easily accessible?



Notes

Activity





Activity



What kind of information is being kept?

Among the records kept, will be those of your customers' needs. They may well be recorded electronically or in writing, depending on the nature of the information and the systems used in the department/organisation.

The information will again depend upon the type of service or product the organisation offers, but the information recorded should enable the organisation to not only recognise the needs of the customer, but to meet them in the most cost-effective way.

To facilitate this, there may well be a mix of information, formal and informal, comprising:

- Personal details or customer details of product/service to be supplied. Copies of official agreement/sales orders etc.
- Copies of computer/manual arrangements.
- Copies of letters/memos/reports etc.
- Any special arrangements or instructions agreed upon.

We have seen earlier there is a need for you and the organisation to keep records if you are to identify and meet the needs of the customer. What are the likely benefits of this?

- To your customer
- To the organisation
- To you

The likely benefits to the customer are that they will have their needs satisfied promptly and efficiently, making them satisfied.

Satisfied and loyal customers will keep the organisation satisfied and keep you happy

However this can only happen if the information contained in the records helps us to deliver excellent customer service, and the records will only help us if they give us the correct information on the customer, product, situation, etc. If they are out of date, or incorrect they will give us false information.

What might the effect of incorrect records/information be?

Think of a work-related instance where incorrect customer information resulted in poor customer service delivery. Write it below.

Notes

Activity



Notes

At the very least, incorrect information will cost the business in terms of resources (time, money) but at the worst it may result in the loss of a good customer, and if the customer doesn't complain directly you may not only lose them, but others too.

It should be recognised that information is an essential commodity and that information should be accurate, brief and clear - the ABC of communication.

For it is only in identifying customer needs and matching them with your product that a satisfied customer is produced.

“Business is about making money from satisfied customers. Without satisfied customers there can be no future for any commercial organisation.”

Sir John Egan - Jaguar Cars

Obviously, information that is recorded needs to be accurate. This requires:

■ Obtaining accurate factual information.

How often have you been given information that has turned out to be incorrect? Sometimes it may be deliberate, but more often it is due to the source and type of communication. Often people will tell you things in good faith that they have heard of, or from other people, that is not factual in origin.

When you read more about communication you can perhaps understand more easily how incorrect information arises, but if you are recording information you need to be sure it is factual, for once recorded it will be read as fact. Have you heard it correctly? Always check back.

■ Recording information accurately.

You will also need to ensure that you have recorded it accurately. Check it over carefully - a few seconds now may save hours later. In particular, check telephone numbers - is the code up to date? Take care that digits have not been transposed.

Being too brief can make information unclear, but being too long-winded can confuse. Try to choose the right words for others who will read it. Try to convey the information and any feelings as concisely as possible and in a logical order.

Being accurate and concise means achieving clarity. Is what I am communicating clear to others? Have I avoided ambiguous phrases, jargon, slang or other words open to misinterpretation?

Always make sure that the information that you record is factual and recorded in a form and manner that will ensure that subsequent readers will not misinterpret or misread it.

Also ensure that time is spent keeping it up to date and accurate. Ensure that all defunct, out-of-date information is deleted.

■ Where does an organisation get its information?

Most of the information will be generated from within the organisation but it is also likely that other essential information will come from other sources outside the organisation.

What systems exist for feeding information into your record systems?

Notes

Activity



Notes

Presumably you will have systems set up that ensure that all departmental information and transactions affecting your customers will be recorded.

Where possible, it is preferable that these occur as a natural consequence (for example, copies of letters / contracts to file) but it may be that staff are trained to appreciate the importance of 'occasional' information (for example, change of telephone number) and recognise the need to record it.

Activity



- What are the strengths of your record systems?

- What are the weaknesses of your record systems?

■ Suggestions for changes to record systems.

- What is the procedure for recommending improvements to record systems in your organisation?

- Who do you have to contact?

- What information must you supply?

Notes

Activity



Notes

It is likely that other departments may use the system and you may have to liaise with them to identify any likely effect your suggestions for change will make.

It would be beneficial to reach agreement before suggestions for change are submitted if the changes are likely to affect other parties.

It is unusual to have a records system that does not have other uses by other departments/services drawing on its information for other purposes.

It is likely therefore that the implication of changes will have to be identified before they are implemented and a higher authority may have to be involved to facilitate the changes.

That is not to say that changes could not or should not be made, but rather that they have to be thought through and the case presented. In finding out the procedure for recommending improvements, you will have found out the preferred form in which recommendations should be made and to whom they should be directed.

Some organisations will have formal suggestion schemes, others will have fairly informal arrangements.

Most suggestions will be required in writing and may demand presentation in a particular format and particular information such as:

- The change that is being suggested.
- Why the change is thought to be necessary.
- The benefits/changes it will bring to customer service.
- What possible costs there may be to implement the change.
- Effect it may have on other users of the particular system.
- Factual information supporting the suggestion.

Example



Assuming that information has to be used in the future, it should be maintained in good condition and in the right place.

Good condition means that it should be:

- **Readable** - in other words legible so that any writing hasn't faded away or is in such poor handwriting that no one can read it.
- **Understandable** - to anyone who reads it in future.
- **Complete** - without missing sections
- In the **correct order** (for instance if it is a 50-page report, each page is in order and complete)
- **Easily filed again** - this means having some kind of filing code or reference so anyone can put it back in the right place.

■ Information in the right place

The right place for information is usually where the organisation's procedures say it should be. Of course, there must be some logic to this so that everyone can understand how the system works. Let us now look at the **different types of filing** and recording systems. These can be broadly divided into:

- Manual Systems
- Computerised Systems.

Notes

Example



Manual systems of storage

In order to keep information in good condition, it needs to be kept somewhere safe, where it can be easily retrieved. Here are some of the most common manual storage systems:

Box files	These are literally boxes that can be stored on shelves. They are usually designed to accommodate “A4” sized sheets of paper. They can be indexed and easily stored on shelves.
Lever arch files	Similar to box files except that there is a mechanism for holding all the papers together.
Expanding or concertina files	This looks like a document bag that opens out to reveal separate compartments.
Ring binders	These come in different sizes. You can put paperwork into a desired order.
Folders	These come in different varieties but are essentially made of folded card into which papers can be safely filed. The contents can be labeled and stored in a filing cabinet

Computerised filing systems

Most organisations use some or other form of computerized system today. Filing of data is usually done by data being stored in the database of the computer. Computer systems have progressed a long way since the early days of computers and the systems are today very “user friendly.”

It is therefore not very difficult to access and obtain customer information very quickly from a computerised system. Having the information in a database makes the use of the information much more flexible. Information from the same source can be taken out in many different variations that make it much more useful for the purpose of a particular user.

Much more information from different customers can also be accessed very rapidly, speeding up responses, operations and improving customer service control mechanisms.

This test consists of a number of multiple-choice questions. Choose what you think is the right answer.

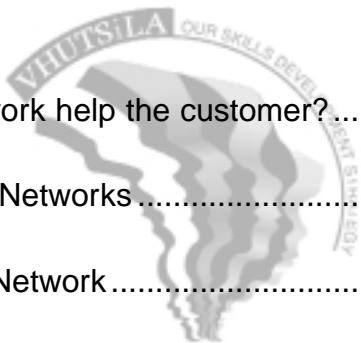
1. Your memory:
 - (a) lasts forever
 - (b) deteriorates over time
2. Record-keeping is:
 - (a) a waste of time
 - (b) essential for good customer service.
3. Customer service records should be:
 - (a) detailed and complicated
 - (b) contain enough information to solve a problem and provide useful customer information.
4. Records should be:
 - (a) readable
 - (b) made up of a secret code known only to top management.
5. GIGO means:
 - (a) "going in, going out"
 - (b) "garbage in, garbage out".

Activity



Using external and internal sources

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■ Building External Networks	59
■ Expanding your Network	61





Specific outcomes

- Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail and wholesale outlets



Assessment criteria

- Effective working relationships with colleagues are maintained.
- Organisational networks to support effective customer service are regularly evaluated.
- Communications with external parties are effectively maintained on behalf of customers.
- New contacts likely to benefit customer service are identified
- Networks are actively used to evaluate new ideas to help maintain and improve customer service.

In this module you will find out about working together with others to ensure that the quality of customer service is maintained at the highest possible level.

No person works in isolation and we all depend on colleagues to get a job done properly. Doing our job well entails forming working relationships with lots of different people and groups. These working relationships form the basis of 'networks' - simply a chain of contacts used to help carry out your job.

A good network can ensure that you can assist the customer in getting the best possible service level. To make sure that these networks work well, there must be close co-operation and trust between people. That is all the people you rely on (however insignificant) to ensure that the customer remains satisfied.

Notes

Activity



Think of the people and organisations that you depend on to help you maintain excellent customer service. List them below:

Notes

These networks of trust do not happen by themselves, nor do they spring up overnight. They need working on and developing. This is the theme of this element - to help you build up an effective and efficient network of working relationships.

You may have noticed that in your own network, there are different sorts of people - those who supply you with things, those who provide services, some who can help you and so on. We can categorise these networks as:

Informal	People not necessarily contracted to work with you but who give you help and assistance in some way. An example might be someone from another department whom you can turn to for advice, or it might even be someone who works in a different organisation
Formal	These are people who are expected to work with you - it could be people in your own office, factory or workspace, people in other departments, people in other organisations – and who are expected to have a working relationship with you.
Internal	People who work for the same organisation as you.
External	People who work for other organisations but with whom you are in contact.

You may want to categorise your network in a different way by thinking about what people do and how they assist you. Consider the following approach:

- **Internal customer:** People who receive "inputs" (goods or services) from the organisation.

- **Internal suppliers:** People from whom you receive "inputs" to be able to do your job.
- Your team members
- Your manager or supervisor.
- People who come to you for advice
- People you go to for advice (your mentors)

■ How can my network help the customer?

Building up excellent working relationships with others can only benefit all the members of the group and, in the end, the customer.

What do you think are the main advantages of building up a good network with internal and external customers, colleagues and people outside the organisation?

You might have pointed out the following advantages:

Information: If two heads are better than one, think of the impact of many of heads. Working as a team means that you can share information and build up ideas. Most organisations have extensive "grapevines" - informal routes of communication down which messages and information are passed and get exchanged. It can be very useful to tap into this grapevine - but make sure that you are dealing with positive contributions and not idle gossip

Information is nearly always a two-way process. Any advice you obtain from others can be matched by the experience and knowledge you have to offer the network. In this way the sum of the organisation's information grows.

Here is a suggested strategy for helping to build up a network team of working colleagues:

Notes

Notes

- Make sure that your aims are clear - what do you want to achieve. Start in a small way - don't be too ambitious at first - keep the team small and tight-knit until ready to expand.
- Make sure that everyone understands who they are in the team and what is expected from them and get everyone to agree to up time and make a commitment.
- Build in a timetable that is realistic and understood by everyone.
- Make sure that communication within the team is as good as possible.
- Don't ask people to do too much - be realistic.
- Short regular meetings may be better than infrequent ones that last for hours.
- Face up to problems with the whole team - discuss anything people are worried about.
- Do not raise false hopes and expectations.
- Re-organise the team if it is not functioning well.
- Be aware of the potential problems of getting people to work harmoniously together if there are differences in age, gender, status, and so on.
- Never force the pace
- Involve everyone in the team - people who feel left out will not want to be loyal to the team.

- Think about the impact on other teams - some groups may feel threatened or left out by the existence of your team however informal it is.
- Delegate tasks to members of the group according to individual skills, strengths and personal timetables.
- Never be afraid to ask for help.
- Expect to make mistakes and learn from them.

In summary - getting the best out of people in your team or network relies on:

- **Results** - do people know what is required of them?
- **Motive** - are the people motivated to produce good results?
- **Resources** - Do people have the resources to do the tasks properly?
- **Competence** - are the people in the network able to achieve the results?

■ Building External Networks

One of the problems you might be facing in building up good networks, is how to build up contacts in other organisations.

Notes

■ Expanding your Network

You want to keep your level of customer service at its peak - but how do you look for new opportunities? One way is to use your network of contacts and try to find new people and groups who can be of mutual assistance.

Staying ahead of the competition and getting a reputation for first-class customer care is never easy. One way is to extend and develop your network of working colleagues. How should you do this? There are several approaches to try:

- Try to meet people informally at lunch times, after work, in sports and leisure clubs and at professional or industry gatherings.
- Read industry-related journals to find out where likely people for your extended network may be gathering - seminars, exhibitions and trade fairs, lunches, product launches, talks, workshops and so on. Make an effort to attend.
- Use library sources (perhaps your organisation has one) to find out about other groups, bodies, suppliers, and so on that could be interested to work with you in some way. Look for newspaper cuttings, articles, journals, newsletters that relate to the area of your interest.
- Keep in touch with existing network contacts by sending greeting cards.
- Invite suppliers and so on to a function - lunch, a reception, a product launch - it doesn't really matter as long as the personal contact can be maintained.

Notes

Helpful tips



Activity



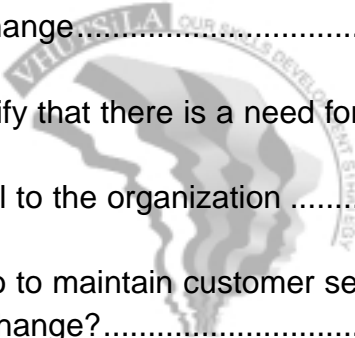
This activity requires that you write short essay-type answers to the questions asked.

1. What are the benefits of networks?
2. Write a brief description of each of the four types of network.
3. In what ways can a network help your customers?
4. Discuss any three of the ways in which you can build up a network.
5. Discuss the four ways in which you can get the best out of your network.



Identifying shortfalls in products and service

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Unit standard no: RW/C/SERVE/4

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Specific outcomes

- Identifying and alerting co-workers to shortfalls in products and services in retail/wholesale outlets.

Assessment criteria

- Comments on customer service are consistently obtained from customers.
- Complaints and enquiries from customers are used to evaluate products or services.
- Customer information is stored in appropriate methods.
- Implications of changes to products or services are identified and communicated to all concerned.
- Results of changes to improve customer service are regularly monitored and communicated to all parties concerned.
- Recommendations for improvement to customer service are communicated to colleagues and co-workers



■ Changes in customer needs

No organisation, no matter how well their products or services are supported by customers, can afford to become complacent about their ability to satisfy the needs of customers.

It is a fact of life that many things change over time. Customers and the satisfaction of their needs are no exceptions. Many changes in the needs of customers are externally motivated.

Organisations are always trying to create a demand for their products. They do this by studying the needs of customers and even “creating” needs for customers.

As an organisation you may be perfectly happy with the products or services that you provide, but along comes a competitor with a new product or service that totally upsets the apple cart. Very soon the needs of some of your customers are being re-directed towards your competitor’s product or service. If you do not recognize or take cognizance of this threat it can affect your business. Clearly this new product or service has highlighted a shortfall in what you have to offer your customers.

This shortfall must be addressed urgently in order to once again meet the needs of your customers.

- Think of 5 products or services that were very much in demand at one stage but are not available anymore today. Write them down below.

Notes

Activity



■ Resistance to Change

Many organisations acknowledge that changes occur in the needs and patterns of customers, yet as organisations they fail to take appropriate action to rectify their position.

Why do organisations ignore changes in customer needs? There may be a number of answers to this question but one very concerning reason lies in the resistance to change.

Very few people like change, because change brings uncertainty and uncertainty causes stress. The easy way out is therefore to resist change.

Organisations resist change just like individuals and it takes a concerted effort to mobilize an organisation to react proactively to change. Organisations may give many reasons to motivate their resistance to changes in customer needs. These reasons include:

- “We believe that our product is much better than the competitor’s product.”
- “We have a very loyal customer base. Our customers will not be attracted to the products of competitors.”
- “Making changes will upset our plans, strategies and budgets.”
- “The perceived change is just a fad. It is short-lived and no threat at all.”
- “It has been tried before and it didn’t succeed, so why will it succeed this time?”

Notes

Activity



■ **How do we identify that there is a need for change?**

Try listing some signs that you think customers may give to show that they are not completely satisfied anymore and are looking for change.

You have most probably identified a number of indicators that customers are not satisfied with your service anymore. The following indicators are also indicative that customer needs are changing:

Complaints	When customers complain, it is usually an indication that the service they are getting from you is not meeting with expectations. When there is an escalation in the number of complaints, it is a sure sign that things are changing.
Inquiries	When there is a noticeable increase in the number of inquiries received from customers about products/services not on offer or product or service related characteristics that are not available, you are dealing with indications of unrealized customer needs.
Returns	Goods returned are usually indications that customer expectations have not been met and needs are not satisfied. The reasons for returns should be thoroughly investigated. The chances are that the organisation is providing products or services to customers through overzealous sales staff. Customers are overwhelmed and only realize at a later stage that what they got is not what they need.





Requests for help	Failure by customers to make things work or assemble them may indicate that customers are not being catered for properly and changes are required.
Service Calls	Increases in service calls may indicate that customers are experiencing difficulties or problems and need changes to solve those problems. The reasons for such problems must be considered and changes made to eliminate them.
Angry customers	When customers get angry or frustrated it is an indication that things are not as they should be with your customer service and action is needed.

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■ Shortfalls internal to the organisation.

The discussion above focused on changes in customer needs induced by forces external to the organisation but those are not the only reasons for shortfalls in customer service. Shortfalls in customer service can also be caused by factors internal to the organisation. This implies that the customer service process within the organisation is not properly aligned and somewhere there are “breakdowns” in the service.

How do I recognize shortfalls internal to the organisation?

Shortfalls may occur as a result of:

- Your own performance not meeting expectations anymore.
- The performance of individuals/co-worker(s) or other team members not being up to standard anymore.
- The performance of a department or the co-operation between departments failing the standards.
- Policy or procedure changes causing customer service breakdowns

Activity



- **What must we do to maintain customer service during times of change?**

Think of a change that was implemented in your workplace that did not go down successfully. Write down the reasons why it was not a success:

Think of an occasion where a change was successfully implemented in the organisation. Write down the reasons for its successful implementation:

Compare your reasons to the procedure below to see to what extent you have followed a similar procedure successfully or not.

To successfully implement change, the following is necessary:

- Communicate the reasons for required changes to all parties affected.
- The resistance to change must be anticipated and the fears and objections dealt with in a positive and motivational manner.
- An organisational plan to deal with the implementation of the required changes must be drafted and agreed to by all concerned.
- Action plans must be formulated and authorities for implementation assigned.
- The action plans must be communicated to all persons affected and their involvement and commitment obtained.
- A time schedule must be agreed to when desired changes will be affected and finalized.
- Regular communication must take place to keep all informed of progress and results achieved.
- The results of the changes made must be measured and corrections made until the desired levels of customer satisfaction have been achieved.

The following actions are required to restore and maintain customer service during times of change:

- Recognise and accept that change is happening and needs to be addressed effectively.

Notes

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- Establish what the reasons are for the changes that are occurring.
- Identify feasible solutions to meet the new needs of the customers.
- Implement whatever actions are required to effectively address the needs
- Manage the changes brought about in the organisation to restore customer service levels.

■ How do we manage change effectively?

Organisational change will not happen automatically or spontaneously. It requires definite action and the process must be properly managed.

■ Pro-active response to customer service shortfalls

The discussions so far in this module focused on the fact that change in customer needs happens either because of external or internal disturbances. The result is a shortfall or breakdown in the level of desired customer service.

Action is then required by the organisation to correct the imbalance and restore the customer service levels. It should be clear to you that what has been discussed so far concerning shortfalls in customer service highlighted a re-active mode of operation in an organisation. This means that organisations **do something after the fact.**

Organisations should, however, try and prevent a situation where they have to be reactive. Being reactive is costly both in remedies, possible customers lost and damage to the image of an organisation.

Organisations should therefore ensure that they have structures in place that act as early warning systems to shortfalls in customer service, enabling the organisation to be pro-active and preventing such shortfalls.

What information on customer service is obtainable in your organisation?

Measures of customer service information varies, but it could include such sources as:

- Numbers of complaints
- Numbers of customer inquiries not met.
- Number of customer calls not returned.
- Response times to telephone calls.
- Number of products returned.
- Letters of commendation from customers.

Notes

Activity



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- Number of late deliveries
- Number of incorrect invoices, account balances, etc.

Activity



What structures does your organisation have for presenting customer service information?

Organisations have different systems that they use and not all systems are equally effective in all organisations. The following systems are, however, common to many organisations

- Monthly/weekly management reports.
- Departmental reports or meetings
- Internal customer survey reports
- Customer complaints logging systems
- Customer Help Desk reports

How does your organisation use the customer service information obtained

Activity



Despite the fact that many organisations do have systems that monitor customer behaviour and measure customer satisfaction, these systems are not always used effectively. In many instances these systems are initially implemented with vigor yet slide into disuse quite rapidly.

The reasons for this are firstly because customer needs do not change every day and changes are not always apparent. This “lack of action” on the part of the customer causes employees and managers to lose interest in tracking possible changes.

Secondly, systems are frequently implemented in organisations with very good intentions, but these systems don’t have “champions.” Champions are individuals or groups that keep systems alive, up-to-date and functioning. If no one accepts or is assigned responsibility for the maintenance of a system, it quickly falls into disuse.



This activity consists of various general questions.

1. Describe three indicators that change may be necessary.
2. List and describe three actions that you must take to ensure that change is successfully implemented.
3. How can you measure customer service?
4. List three systems that all organisations should have to deal with customer service matters.
5. What are the reasons that customer service systems often slide into disuse?



Activity





Individual post-course assessment checklist

C1

Individual post-course assessment checklist

Please remove pages C2-C5 from your manual and complete them. Hand them in to your facilitator **or** if you are a distance learning candidate remove and file in your portfolio of evidence under the section **“INDIRECT EVIDENCE”**.

Date:

Name:

Company

Tel: Fax:

E-mail:

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Post-course assessment

Name: _____

ID no: _____

Unit standard: Providing customer service

Unit standard no.: RW/C/SERVE/4

Competency	Please tick one of the following					Comments on how competence was achieved	Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills		Yes	No
When a customer has a problem, I always listen, show empathy, make notes, find out what the customer wants me to do.								
I can explain our record systems with confidence.								
I always try to ensure that I keep my part of our customers' record system current.								
My records on customers are always up-to-date.								
I prefer to rely on my memory rather than a record system.								
I know exactly where to look for product information.								
I know exactly where to find information on our customers.								



Competency	Please tick one of the following					Comments on how competence was achieved		Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills	Yes	No		
I make notes of expressed customers' needs to see if we cannot include them in our products or services.									
I regularly make suggestions about improving our customers' service.									
I try to use every available opportunity to expand my network of contacts.									
I regularly visit trade fairs to expand my product knowledge.									
I insist that I be informed and trained on new products or services introduced to our organisation.									
I make a point of walking around our organisation to see what new products or services we have.									
I regularly meet with or talk to my colleagues on ways to improve our service to customers.									

Competency	Please tick one of the following					Comments on how competence was achieved	Do you require assistance to comply with unit standard?	
	No skill	Some skill	Average skill	Above-average skill	Expert skills		Yes	No
I make a real effort to eliminate shortcomings in our products or services.								
I am always on the lookout for changes in customers' needs.								
I cope very well with changes to our products or services.								
When I perceive a change in customers' needs I bring it to the attention of my manager as soon as possible.								
Changes in customers' needs don't bother me much.								
I resist changes in our organisation.								



Course evaluation

C2

Providing customer service

Date:

Venue:

Presenter:

Co-presenter:
(if applicable)



We would appreciate your objective evaluation of the course



Please evaluate by using the following scale

Excellent = 3

Acceptable = 2

Unacceptable = 1

Presenter/s

To be completed by learners who attended a workshop on the content

1. How do you rate the presenter/s in terms of the following

Evaluation

- a) Style of presentation?
- b) Pace?
- c) Knowledge of subject?
- d) Obtaining participation?
- e) Clarity?
- f) Facilitation skills?

■ General comments on the presenter/s:

.....

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Training methodology

2. How do you rate the training and visual aids in terms of the following:

- a) Manuals and handouts? (all learners to complete)
- b) Transparencies/powerpoint slides

To be completed by learners who attended a workshop on the content

■ General comments on training methodology:

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3. Would you say that the course content is applicable?

Yes
No

■ If your answer is no, explain why.

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Value added

4. Rate your overall satisfaction

Excellent = 3
Acceptable = 2
Unacceptable = 1

■ Explain why

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Workplace guide

C3

Please remove pages C15-C20 from your manual

Present this workplace guide to your
line manager in order for your
line manager to coach you on the workplace
component of this unit standard



Introduction

This workplace assessment guide must be seen as a guide to workplace assessors and coaches responsible for learners' participation in the learning programme "Providing customers' service" as practiced in retail and wholesale outlets.

Purpose

The purpose of the guide is to indicate to workplace assessors and coaches those practical skills to be developed and demonstrated by learners in the workplace in order to meet the requirements of the specific outcomes as described in unit standard RW/C/SERVE/4.

Requirements

Learners must be able to prove their competence at the prescribed skills by being given the opportunity to participate in and perform the tasks/responsibilities that will expose them to the specific outcomes and skills.

Workplace assessors and coaches must assess competence in the workplace by looking for convincing proof of competence in a learner to perform the different tasks in a manner that meets the requirements of the unit standard. The following assessment methods may be used singularly or in combination to conduct the workplace assessment:

- Portfolio of evidence
- Simulations (where actual performance is not possible or impractical)
- Documentary evidence provided by learners
- Authenticated testimonials from third parties
- Storyboards (describing events that demonstrate competence) prepared by learners and authenticated by line managers
- Questioning and interviewing, and recording results

Workplace assessors and coaches must also ensure that the workplace:

- Is conducive to fair and objective assessments
- Enables the learner to apply and demonstrate skills and knowledge
- Allows the learner to feel comfortable to learn and be assessed
- Is supportive of the learning interventions



Workplace guide

Unit standard: Providing customer service

Unit standard : RW/C/SERVE/4

Month 1 -2			
Specific outcomes	Content overview	Workplace experience	Notional hours
<p>The demonstrated ability to make decisions and consider options when:</p> <ol style="list-style-type: none"> 1. Responding to customers' queries and complaints by offering a range of solutions for resolving customers' dissatisfaction in retail/wholesale outlets. 2. Recording telephonic queries and complaints to initiate future actions for customers' dissatisfaction in retail/wholesale outlets 3. Negotiating with internal and external sources for providing effective solutions to customers' queries/complaints in retail/wholesale outlets 	<p>Identifying customers' queries relating to:</p> <ul style="list-style-type: none"> • Customers' accounts & statements • Product or service information • Purchasing options • Product/service guarantees & warranties • Other queries relating to customers' service. <p>Customer problems relating to:</p> <ul style="list-style-type: none"> • Products or services • Commitments/promises not honoured by organisations • Poor customers' service provided by employees • Other problems relating to customers' service <p>Range of solutions includes:</p> <ul style="list-style-type: none"> • Replacing/repairing product • Resupplying to replace poor service 	<ul style="list-style-type: none"> • Learners will demonstrate applied competence in the workplace, demonstrating that they can effectively: <ul style="list-style-type: none"> - Interact with customers - Correctly identify customers' complaints and queries - Respond effectively to customers' complaints or queries of differing nature by offering a range of solutions - Remain objective and supportive of customers while resolving their queries - Recording customers' complaints or queries correctly telephonically to enable effective response. - Obtain the support of internal and external sources to resolve customers' complaints or dissatisfactions through excellent customers' service 	110



Specific outcomes	Content overview	Workplace experience	Notional hours
<p>4. Identifying and alerting co-workers to shortfalls in products and services in retail/wholesale outlets</p> <p>5. Updating and maintaining customers' information using a range of data capturing processes for recording customers' details in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Refunding customer. • Providing remedial action free of charge • Offering customers something extra to compensate for poor service • Other solutions offered by organisation • Recording telephonic customers' queries includes: • Recording customers' information and ensuring that adequate and relevant information is recorded to initiate action • Taking personal action to resolve queries • Handing over to appropriate individuals to attend queries • Following up results of resolving queries, manner of resolving and obtaining customers' response • Contacting external sources (e.g. suppliers) to assist with customers' complaint/queries • Obtaining external resources co-operation/support • Informing customers of actions to be taken • Implementing solutions and obtaining customers' responses • Identifying shortfalls in products or services provided 	<ul style="list-style-type: none"> - Identifying shortcomings in products or services and bringing it to the attention of appropriate persons to take remedial action. - Recoding customers' details and information in customers' information systems to keep the information current and up to date 	



Specific outcomes	Content overview	Workplace experience	Notional hours
	<ul style="list-style-type: none"> • Providing feedback to appropriate person(s) • Deciding on actions to be taken. • Implementing corrective actions • Monitoring implementations and recording results • Displaying knowledge of and use of customers' information recording systems used by organisation • Accessing these systems to extract customers' information for problem solving or answering queries • Identifying customers' information to be recorded as per company policies • Capturing customers' information into appropriate system • Verifying correctness of data captured • Checking currency of customers' information every time when dealing with customers to ensure database is correct and up to date • Negotiating permission or assistance/support of superiors/colleagues to resolve customers' problems • Undertaking the necessary intervention to resolve the queries/problems • Obtaining information on results achieved 		



