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**Address Customer Needs**

Unit of Competency – BSBCUS402

Performance Evidence

**Workplace Assessment 1 of 1**

**Meeting Customer Needs**

**In the Workplace:**

To complete this assessment you will need to prepare for and conduct a discussion with a client about your products or services and record the outcome.

Once you have completed this discussion and recorded it, you will need to meet with your Manager to discuss the result and arrange sign off.

**There are 3 Parts to this assessment**.

Part 1 is to be completed after finishing Topic 1 “Assist customer to articulate needs”,

Part 2 is to be completed after finishing Topic 2 “Satisfy complex customer needs”,

Part 3 is to be completed after finishing Topic 3 “Manage networks to ensure customer needs are addressed”.

**Part 1 – Understanding Your Customer**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the first topic *‘Assist customer to articulate needs’.*

**Step 1**

At this point, please consider a client that you regularly have contact with. Then go to page 4 of this workbook and complete the ‘Exploring and Understanding Your Customer template. If you don’t have external clients these may be internal customers.

*Please note that inter-action with this client will form the basis for the remaining parts of this assessment. If you do not have access to a client, please use a ‘simulated environment’ to demonstrate your ability to manage a long term customer relationship.*

**Exploring And Understanding Your Customer**

|  |  |
| --- | --- |
| **Customer Characteristics** | **A Well Known Customer** |
| **Who they are**Are you selling to individuals or businesses?Individuals – what is their age, gender, marital status and occupation?Businesses – what size and kind (eg. Small business or multinational) |  |
| **What they do**Are you selling to individuals or businesses?Individuals – what is their occupation and interests?Businesses – what is their business aiming to achieve? |  |
| **Why they buy** |  |
| **When they buy**What time of day does your customer purchase? |  |
| **How they buy**What method does your customer use to purchase? (Website, face-to-face etc.) |  |
| **How much money they have** What can your customer afford? |  |
| **What makes them feel good about buying?**What makes them tick? |  |
| **How could this customer become difficult ?** |  |
| **What could you do to avoid the customer becoming difficult ?** |  |
| **What are their expectations of you ?** |  |

Now consider the conversation you are about to have with your customer. Consider their past history, their industry, size and potential product or service requirements – as well the information you have input above. In the table below, please describe some of your organisations products or services that may be suitable and a feature and a benefit for each one, that could match the customers needs.

|  |  |  |
| --- | --- | --- |
| **Potential Product** | **Feature** | **Benefit** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

*Please now go back online and complete Topic 2 ‘Satisfy complex customer needs’.*

**Part 2 – Customer Conversation**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the second topic *‘Satisfy complex customer needs’.*

**Step 1**

Now go ahead and speak with your customer to identify and address their needs for your products or services. Once the conversation is complete please provide a summary of the conversation below including how you matched your products or services with their needs and arranged a follow up action.

|  |  |
| --- | --- |
| **Customer Name:** |  |
| **Date:** |  |
| **Customer Need:** |  |
| **Products Discussed:** |  |
| **Product customer decided on:** |  |
| **Was the customer satisfied with the outcome?** |  |

*Please now go back online and complete Topic 3 ‘Manage networks to ensure customer needs are addressed.*

**Part 3 – Networks and Manager Sign Off**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the third topic *‘*Manage networks to ensure customer needs are addressed*’.*

**Step 1**

Consider the customer you have been working with throughout this module. There will be times where you will be unable to meet their needs and you will be required to refer them to some of your networks. This may be another department in your organization, an office in a different state or location or it may be a network external to your organization.

Please complete the table below, identifying networks that you may refer your customer to and what customer needs could be met by referring them.

**Step 2**

Now meet with your Line Manager to discuss the outcomes of the conversation with your customer and gain sign off for this Unit.

Please note, if you are unable to meet with your manager there are 3 other options available for sign off:

1. Attend a Proteus Implementation Day to be assessed by a Proteus Coach (ph: 1300 219 903 for further information).
2. Arrange an appointment at a Proteus office to be assessed by a Proteus Coach (ph: 1300 219 903)
3. Arrange an appointment to be assessed by a Proteus Coach over the phone. (ph: 1300 219 903)

**Networks**

Please complete the table below, identifying networks that you may refer your customer to and what customer needs could be met by referring them. These may be internal (other departments, other locations etc) or they may be external networks that you trust with your customers.

|  |  |
| --- | --- |
| **NETWORK** | **POTENTIAL CUSTOMER NEED** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Question 1 – Please explain below how you have developed these networks and how you maintain the relationship so that you are comfortable in referring your customers to them (100 words).**

**Your Response:**

**Manager’s Sign Off**

|  |  |  |
| --- | --- | --- |
| **Address Customer Needs – Workplace Assessment 1** | **Yes** | **No** |
| Did the student interact with a customer to articulate their needs and evaluate options? |  |  |
| Did the student provide product options to a customer to match their needs? |  |  |
| Has the student established regular communication with the customer including a set follow up time?  |  |  |
| Does the student have the ability to explain the customers rights and responsibilities to them? |  |  |
| Did the student use their organisations procedures to document customer satisfaction? |  |  |
| Did the staff member identify potential difficulties in meeting the customer needs and take appropriate action to overcome them? |  |  |
| **Feedback – Skills Performance** |  |  |
| What feedback can you give you the staff member regarding the standard of their performance in these skills listed above? (50-100 words). Please consider areas of success and areas of development. |
| **Your Feedback:** |

**Your Name:**

**Your Job Title:**

**Your Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date:**

**ASSESSMENT INSTRUCTIONS**

This is the end of Workplace Assessment 1.

Please now go online to the topic menu for ‘Unit 9 - Address Customer Needs’ and click on the box **‘Workplace Assessment’** to submit Workplace Assessment 1.

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**Grading and Feedback.**

Feedback will be provided for each question through the Online Learning System. You will receive an email notification of feedback being posted.

If there are any required changes you will be given an opportunity to resubmit.

Proteus Leadership – 1300 219 903 – online@proteusleadership.com

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