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**Implement Customer Service Standards**

Unit of Competency – BSBCUS403

Performance Evidence

**Workplace Assessment 1 of 1**

**Customer Service Action Plan**

**In the Workplace:**

To complete this assessment you will need to access your organisations Customer Service policies and procedures. You will need to review these in terms of what is relevant for your team and also consider improving these policies and procedures or improving the implementation of them.

You will also need to access customer feedback on the service your team has provided over the past 6 months. This will assist you in coming up with ideas for improving the level of service your team provides.

Once you have completed the Customer Service Action Plan you will need to present your findings to your team based on what they can do to meet and exceed Customer Service levels. You will also need to meet with your Manager to discuss the plan and arrange sign off for this Unit.

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

Part 1 is to be completed after finishing Topic 1 “Contribute to quality customer service standards”,

Part 2 is to be completed after finishing Topic 2 “Implement customer service systems”

Part 3 is to be completed after finishing Topic 3 “Implement team customer service standards”.

**Part 1 – Your Organisations Customer Service Standards**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the first topic *‘Contribute to quality customer service standards’.*

You should have also accessed and read the Customer Service Standards for your organization as well as accessed and read Customer Feedback for your team for the past 6 months.

**Step 1**

At this point, please go ahead and complete pages 3 & 4 of this workbook which is the start of your Customer Service Action Plan.

**Developing And Implementing A Customer Service Action Plan**

Create A Customer Service Action Plan

You are required to develop and implement a ‘customer first’ program for your team/department. You are to review your organisations customer service policies as well as customer feedback for your team, and prepare a plan and present back to your team and Line Manager.

What is your overall objective for this Customer Service Action Plan:

(i.e. what do you want to achieve from your “Customer First” program?)

Using some of the concepts covered in this Unit or other Units, please answer the following questions.

|  |  |
| --- | --- |
| **How will you go about changing the service culture permanently in your area?** |  |
| **How will you handle the negative people?** |  |
| **How will you motivate the people to make positive changes?** |  |
| **What evaluation methods will you put in place?** |  |

|  |  |
| --- | --- |
| **What does your team/department currently do well?** |  |
| **How can you develop these strengths?** |  |

*Please return online and continue with Topic 2 – Implement customer service systems.*

**Part 2 – Customer Service Action Plan**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the second topic *‘’Implement Customer Service systems”.*

**Step 1**

At this point, please go ahead and complete page 6 of this workbook. You will need to identify 6 areas where Customer Service can be improved in your team or organization and come up with an idea to improve each one.

**Step 2**

Once you have your 6 areas for improvement and your ideas to do this on page 6, please proceed through pages 7 to 12 where you will expand on each idea by identifying how you will implement your action, what customers will be impacted, when the change will take place and what resources you will require.

**Customer Service Action Plan**

**Action Plan**

List ways in which you believe your team/department can improve its customer service.

|  |  |
| --- | --- |
| **Areas for Improvement** | **Ideas for Improvement** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Using the template on the following pages, take the areas of improvement for your team or department’s customer service approach that you would like to see improved. Identify who the customers that will be impacted are, then develop an action plan by recommending a change, outlining how you will do this, who is responsible, when the change will take place and how you will gather feedback for the change.

**Customer Service Action Plan**

**Improvement Idea 1**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea ?** |  |

**Customer Service Action Plan**

**Improvement Idea 2**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea ?** |  |

**Customer Service Action Plan**

**Improvement Idea 3**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea ?** |  |

**Customer Service Action Plan**

**Improvement Idea 4**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea?** |  |

**Customer Service Action Plan**

**Improvement Idea 5**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea?** |  |

**Customer Service Action Plan**

**Improvement Idea 6**

|  |  |
| --- | --- |
| **Areas for Improvement** |  |
| **Ideas for Improvement** |  |
| **Customers Impacted** |  |
| **How will you implement?** |  |
| **How will you gather feedback?** |  |
| **Who will be responsible?** |  |
| **When will the change take place?** |  |
| **What resources are required to implement the idea?** |  |

*Please return online and continue with Topic 3*

*– Implement team customer service standards.*

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

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the third topic *‘Implement team customer service standards’.*

**Step 1**

At this point, please proceed through pages 14 to 17 of this workbook. You will need to prepare and deliver a presentation to your team on how they will implement the new customer service standards you have created and how this will ensure you all provide exceptional customer service.

**Step 2**

After the presentation please meet with your Line Manager to discuss the outcomes of the Customer Service Action Plan 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)

**Delivering Exceptional Customer Service**

**Customer Service Presentation**

Using the template on the following page prepare a presentation to your staff explaining the new Customer Service Policy & Procedure for your area.

Your objective should be to communicate the changes and to encourage your team to implement them.

When developing your scene points you may like to cover:

* Why the new policy
* What the new policy is
* How to implement the changes
* When it will be rolled out

**Delivering Exceptional Customer Service**

**Customer Service Presentation**

It is now time to construct a full presentation on how your team will provide exceptional customer service in the future. You will then present this to your group and gain feedback. Prior to commencing preparation, complete the checklist below. This will help to make your presentation more relevant and ensure better outcomes.

Presentation Checklist

|  |  |
| --- | --- |
| **Checklist** | **Actions** |
| **Who is your audience?** |  |
| **What are some of the key characteristics of your audience?** (eg. Age, cultural, educational, gender, language, physical ability and experience with the topic). |  |
| **What visual aids and materials will you use in your presentation?** |  |
| **What examples will you use to illustrate your key points?** |  |
| **What persuasive communication techniques will you use?** |  |
| **How will you build rapport and make your presentation fun and interactive?** |  |
| **How will you give participants opportunities to seek clarification of central concepts during or after the presentation?** |  |

**Customer Service Topic:**

***INTRODUCTION***

Hello, my name is…

I am here today to talk about (topic)…

***SELF***

My background is…

OTHERS

Before we start, I would like to ask…

Today I would like to talk about…

***SCENE (4 dot points)***

*\**

*\**

*\**

*\**

My OBJECTIVE today is…

As a RESULT of this you will be able to…

THE BODY

Point 1

\*

\*

\*

Point 2

\*

\*

\*

Point 3

\*

\*

\*

Point 4

\*

\*

\*

In CONCLUSION today we have covered…

**Scene:**

\*

\*

\*

\*

As a RESULT you will be able to…

**Manager’s Sign Off**

|  |  |  |
| --- | --- | --- |
| **Implement customer service standards**  **– Workplace Assessment 1** | **Yes** | **No** |
| Did the student access, interpret, apply and monitor the customer service standards of the organisation? |  |  |
| Did the student access and read customer feedback about the service provided by the team, from within the last 6 months? |  |  |
| Has the student shown demonstrated compliance with customer service systems and standards? |  |  |
| Has the student reviewed and analysed customer feedback to assist them in identifying Areas for Improvement in Customer Service? |  |  |
| Did the student present their Customer Service Presentation to yourself and the team? |  |  |
| **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 page for ‘Unit 10 - Implement customer service standards’ 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](mailto:online@proteusleadership.com)

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